

PRONTO xi

Applications Overview



Project

Part of the Asset & Facility
Management application

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Project

Project automates the time-consuming aspects of project quotation for greater cost control

Project integrates with other Pronto Xi modules to keep you updated on work orders, sales orders and service calls, minimising unforeseen costs.

Key features of Project include:

- multiple cost centres and budgets per project
- full Cost Breakdown Structure (CBS) for greater cost granularity
- Project Tasks and milestones, helping you achieve greater control over project activities and deliverables
- full integration of Project Tasks into Resource Management for clear visualisation and scheduling
- flexible, progressive invoicing or billing via Claim Schedule

- project hierarchies of up to 20 levels
- customisable profit take-up and release rules
- flexible timesheet creation via Project or Resource Management, with seamless updates to Payroll

Executive Summaries

Project Executive Summary is a powerful analysis tool that provides instant insights. It also allows you to drill down to source data without creating reports.

Project Summary Views are highly customisable and can be based on a combination of Project dimensions. Use the predefined views or customise numerous drill paths to suit your requirements. You can also use project hierarchies to group data.

Project Costs Analysis (In progress)

As at 01-JUL-2024 08:23:59

Melbourne

PROJ E015

Drill

Criteria

Period: November 2022 - 2023

Where: Status Equal To I

☒ Suppress Zero

☐ Suppress Total

Standard

-

20

+

Code	Cost Category Type	Cost Nov. 2022-2023	Budget Cost Nov. 2022-2023	Variance	% Variance	Cost PAT	Budget Cost PAT	Variance	% Variance
L	Labour	514,952.96	500,000.00	-14,952.96	-2.92	1,867,765.87	1,951,250.00	83,484.13	4.28
M	Material	1,006,163.54	952,350.00	-53,813.54	-5.65	3,060,985.13	2,985,310.00	-75,675.13	-2.53
O	Overhead	0.00	0.00	0.00	0.00	229,528.66	653,438.04	423,909.38	64.87
S	Subcontract	0.00	0.00	0.00	0.00	100,892.14	279,852.50	178,960.36	63.95
	Total	1,521,116.50	1,452,350.00	-68,766.50	-4.73	5,259,171.80	5,869,850.54	610,678.74	10.40

View comprehensive project data and drill down to underlying projects

The screenshot shows the PRONTO XI Project Maintenance interface. The main window displays project details for 'Three Story Basement Carpark' (Project ID: 000712, Status: In Progress). The interface is divided into several sections:

- Left Sidebar:** Contains navigation links for Facilities Management, Project, Project Tasks, Scheduling - Project, Project Timesheet Entry, Project Reports, Transactions, Enquiries, Maintenance, and Configuration.
- Top Bar:** Includes a search bar and a list of tabs: Find, Entry, Correct, Actual, Budget, Transactions, Selective, Notes, Raise Orders/Call, Summary, Toggle, Address, Status, Tax Rules, RM Attributes, and Extra.
- Project Details:** A central area containing various fields for project information, including Type (N), Branch (MELB), Customer Ref. (PO36432), Sal. (RS), Parent (000724), PM (rons), Customer (10MULTIPLE), Address (Level 22, 135 King St Melbourne VIC 3000), GL Account, Item (ZZDELETED), Asset, and Tender.
- Reporting Details:** A section on the right containing fields for Project Type (2), Report Unit (1), Market (V), Order Type (1), Proforma, Start Date (15-JUL-2023), Budget Date (15-JUN-2023), Handover (15-JUL-2023), Kick Off (20-JUL-2023), Finish Date (31-DEC-2023), and Invoice Date (16-MAY-2024).
- Options:** A dropdown menu on the far right listing various options like Claim Schedule, Tasks/Task Resources, Variations, Orders, Forecast Costs, Subcontract Details, Budget Summary, Chargeout, Raise Invoice, Profit Takeup, Extra Details, Issues Register, Audit, Cost Breakdown, and Timesheets.
- Budgets and Costs:** A section at the bottom displaying financial data for Budget Values, Forecast, Actual Values, and Percentages. It includes fields for Revenue, Cost, Profit, Margin%, and Hours.

Find all project details in one central area

Project types

A “project” is any work undertaken by your company over any time period. It is either performed for a customer defined in Accounts Receivable, or is posted to a General Ledger or Fixed Asset account.

Project allows you to create number of different project types, including:

- contract
- time and materials
- asset creation
- enhancement
- General Ledger cost
- cost tracking
- warranty
- rework
- manufactured (requires Shopfloor Manufacturing)
- maintenance management (requires Maintenance Management)
- service (requires Service Management)

Project workflow

Creating a quotation or responding to a tender? Define a hierarchical Cost Breakdown Structure (CBS) for all related labour and materials. Simply apply margins to each element to formulate a detailed Claim Schedule, which can be used as the basis for billing. Set up Project Tasks to define the activities, resources and commitments required to carry out each project phase.

Once projects are in progress, track incurred costs and income earned. Project fully integrates with Pronto Xi modules, such as Accounts Payable and Purchasing, allowing you to record the project and cost category against any purchase order or supplier invoice.

In addition, you can directly raise purchase orders for required materials from project budgets and apply these to each relevant Project Task. This ensures all commitments are managed in conjunction with the project activity or deliverable. Purchase orders can also be consolidated to help save on shipping costs, and materials held in a dedicated warehouse until due onsite.

Where items are built specifically for a project, Project creates manufacturing work orders based on a standard bill of material (BOM). You can also customise configurations using the Sales Configurator tool.



Project integrates with Pronto Xi's Payroll, Resource Management, Resource Scheduler and Fixed Asset modules, allowing you to record labour expenses and equipment hire through timesheet entry. Where applicable, Project automates Payroll postings on costs to the project so the true cost of a resource is accounted for.

Throughout the project lifecycle, you can examine costs and income for each cost category or against the master item details referenced by the project to easily compare the information to your original budgets.

Project tightly controls variations to the original quotation. Enter provisional variations, submit these to the customer, record them as rejected or approved, and modify the budgets accordingly.

The Master Claim Schedule also reflects these costs and income against the original item list or any items defined as variations of the project.

Project lifecycles

A project goes through a number of stages from creation to completion, and a different status represents each stage.

Raise a Quotation

Generate quotations based on estimated costs, and record customer details and nature of the project at the same time.

Modify Quotation

Modify quotations at the negotiation or re-evaluation stage. If costs are incurred before the final budget sign-off, record these before moving the project to In Progress.

Accept/Reject Quotation

Once the quotation is raised, accept or reject it. An accepted quotation becomes a project In Progress, while a rejected quotation is archived as a lost quotation.

Setup

Capture initial project details during the setup stage. You can also record any costs against the project and revise original cost estimates.

In progress

Once a project is In Progress, record costs incurred against the project, as well as invoices generated, variations processed and profit taken up.

Close the project

When a project is complete, the close-out operation calculates its final profit/loss (profit can be taken up to a nominated account in the General Ledger) and its status changes to "finished".

The close-out operation is irreversible, but sub-projects can be attached to a closed parent project.

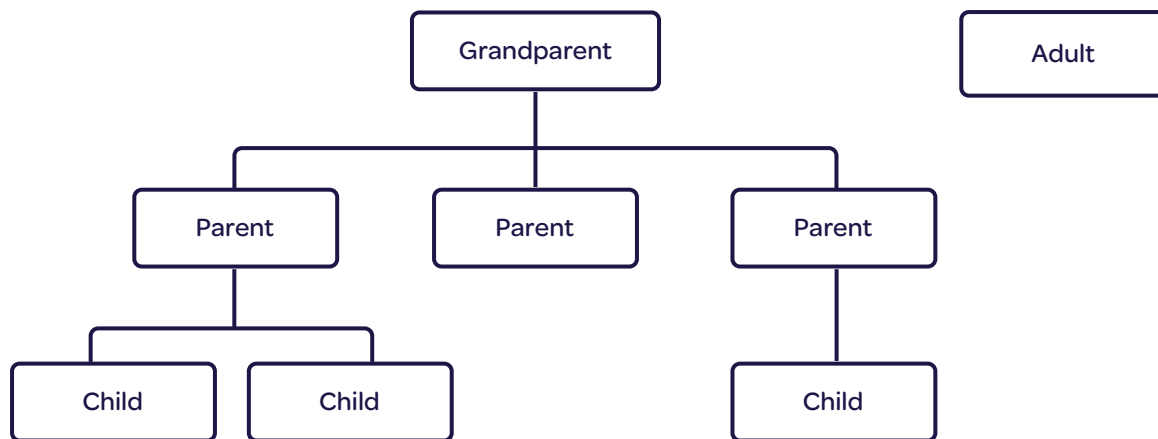
Close-out rules

Set close-out rules according to different types of projects and locations, providing flexibility for businesses that need it.

For example, choose to fully invoice contract projects to their full value before close-out. Or invoice the value for time-and-materials projects once those costs are determined.

Apply up to 11 close-out rules to a project. These can include:

- prevent closing if the project is not invoiced fully according to contract value
- prevent closing if purchase orders are not both received and invoiced
- prevent closing if work in progress is not cleared
- prevent closing until all variations are approved
- run a system integrity check upon closing
- use a defined method of profit take-up at closure, or define that no profit take-up is used at all



Set up a project hierarchy

Relationships between projects

Use Project to build a hierarchy of projects for enquiry, reporting and invoicing purposes. Four hierarchy levels are available, with up to 20 Child projects available under the Grandparent/Parent hierarchy. The levels are:

- **Grandparent** — The highest-level projects, available only for enquiry purposes. Pronto Xi rolls up the budgets and actuals of the lower-level projects to the Grandparent
- **Parent** — These projects can have sub-projects attached, with budgets and actuals rolled up to the Parent project for enquiry and reporting. If the customer is invoiced at this level, costs from the Parent and sub-projects aggregate, the mark-up is applied, and the parent project is billed
- **Child** — These sub-projects are attached to a Parent project but have their own budgets and scheduling. Costs may be posted directly to sub-projects and projects invoiced at the Parent or Child level
- **Adult** — Independent projects with no relationship to other projects

Cost management

Project enables you to maintain accurate and timely cost control of projects with its Cost Breakdown Structure (CBS), allowing for greater costing granularity, cost allocation and margin management.

The CBS provides a sequential framework of activities and their related costs. You can itemise and prioritise tasks within a cost category to assist in the scoping, quoting and tendering of projects.

Multiple CBS levels can be linked to a Project Task to align material commitments and resource requirements with activity time frames. By breaking down costs within a hierarchical structure, you gain greater control when applying mark-ups, factoring variations or managing the analysis of project budgets versus actual costs.

To further streamline the quoting process, Pronto Xi includes a Copy to Claim Schedule option to pass detailed cost structures directly to the Claim Schedule area. This ensures greater consistency across the project and delivers the foundation elements for quoting and invoicing.

Benefits include:

- consolidation of multiple CBS structures when tendering for multi-site opportunities
- user-defined CBS row colours so segments can be easily visualised and differentiated
- the ability to upload CBS structures from Excel
- automation of actual cost disbursement across CBS elements
- the ability to copy CBS structures from other projects
- visibility of what percentage is completed for linked tasks
- the ability to identify and minimise potential cost overruns while the project is in progress
- the capacity to generate more accurate quotations, cost tracking and service warranties

Cost categories

You can group certain types of costs within a project into cost categories and assign separate budgets and cost totals to each category to assist with budgeting and analysis.

Costs

There are multiple ways to incur direct costs against a project, including:

- sub-contracting
- purchasing
- inventory
- supplier invoices
- journals
- timesheets

Issue inventory to a project directly or via a sales order, purchase order or supplier invoice.

Timesheet entries record costs for labour and equipment hire, including overhead cost generation.

Journal entries — using the journal function in Financials — can be used to record indirect costs against projects.

Variations

Project allows you to make and manage variations to the original project.

Monthly summary

Project stores data in monthly buckets each time a transaction is processed against a project, dramatically increasing the efficiency of enquiry functions.

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Facilities Management Project

Project Tasks Project Reports

Scheduling - Project Transactions

Project Timesheet Entry Enquiries

Project Reports Maintenance

Transactions Configuration

Enquiries

Maintenance

Configuration

Cost Breakdown Structure

Details

Project: 000712 Three Story Basement Carpark
Customer: TOMULTIPLE Brookfield MULTIPLEX
Variation No:
Version No:
PROJ M117

Standard 20

Sequence	Description	Cost Category	Cost Allocation	UOM	Qty	Hours	Unit Cost	Cost Per	Cost	Total Cost	Percentage Markup	Markup Value	Cost + Markup
1	Three Story Basement Carpark		0										
2	Site Establishment		0										
2.1	Labour		1										
4.1	Foundations		1										
4.2	Concrete	CONC	1	EACH	1.0000		89000.00	1	89000.00	89000.00	25.000	22250.00	111250.00
4.3	Pump Hire	HIR	1	HR	20.0000		200.00	1	4000.00	4000.00	25.000	1000.00	5000.00
4.4	Labour		0							110000.00			
4.4.1	Apprentice	LABA	1	HR	200.0000		60.00	1	12000.00	12000.00	25.000	3000.00	15000.00
4.4.2	Tradesman	LABT	1	HR	1000.0000		80.00	1	80000.00	80000.00	25.000	20000.00	100000.00
4.4.3	Foreman	LABF	1	HR	200.0000		90.00	1	18000.00	18000.00	25.000	4500.00	22500.00
4.5	Materials	MAT	1		1.0000		50000.00	1	50000.00	50000.00	25.000	12500.00	62500.00
4.6	Barriers/Traffic Control	SUB	1		1.0000		40000.00	1	40000.00	40000.00	25.000	10000.00	50000.00
5	Carpark Level 1		0							463900.00			
5.1	Concrete	CONC	0	M3	3000.00		85.00	1	255000.00	255000.00	25.000	63750.00	318750.00
5.2	Pump Hire	HIR	0	HR	200.00		300.00	1	60000.00	60000.00	6.125	3675.00	63675.00
5.3	Labour		0							100000.00			
5.3.1	Apprentice	LABA	0		300.00		50.00	1	15000.00	15000.00	25.000	3750.00	18750.00
5.3.2	Tradesman	LABT	0		1000.00		70.00	1	70000.00	70000.00	25.000	17500.00	87500.00
5.3.3	Foreman	LABF	0		200.00		90.00	1	18000.00	18000.00	25.000	4500.00	22500.00
5.4	Materials	MAT	0		1.0000		45900.00	1	45900.00	45900.00	25.000	11475.00	57375.00

Review granular cost details with the Cost Breakdown Structure

View details of a Project Task

Project Tasks

Project Xi's Project Tasks functionality improves your ability to manage projects by activity and duration. By attributing a task to a specified element within the project CBS, Project Tasks brings together budgeted cost estimates and the activity details necessary to get the job done on time and on budget.

Project Tasks allows you to view each task's percentage completion and status, helping to deliver greater insight into the project's progress. Under the Project Task structure, you can plan and organise deliverables in line with critical milestones, ensuring preliminary tasks are completed before subsequent tasks begin.

Attach purchase orders, material requisitions, resources and CBS elements to tasks, allowing better tracking and commitment reconciliation at the activity level.

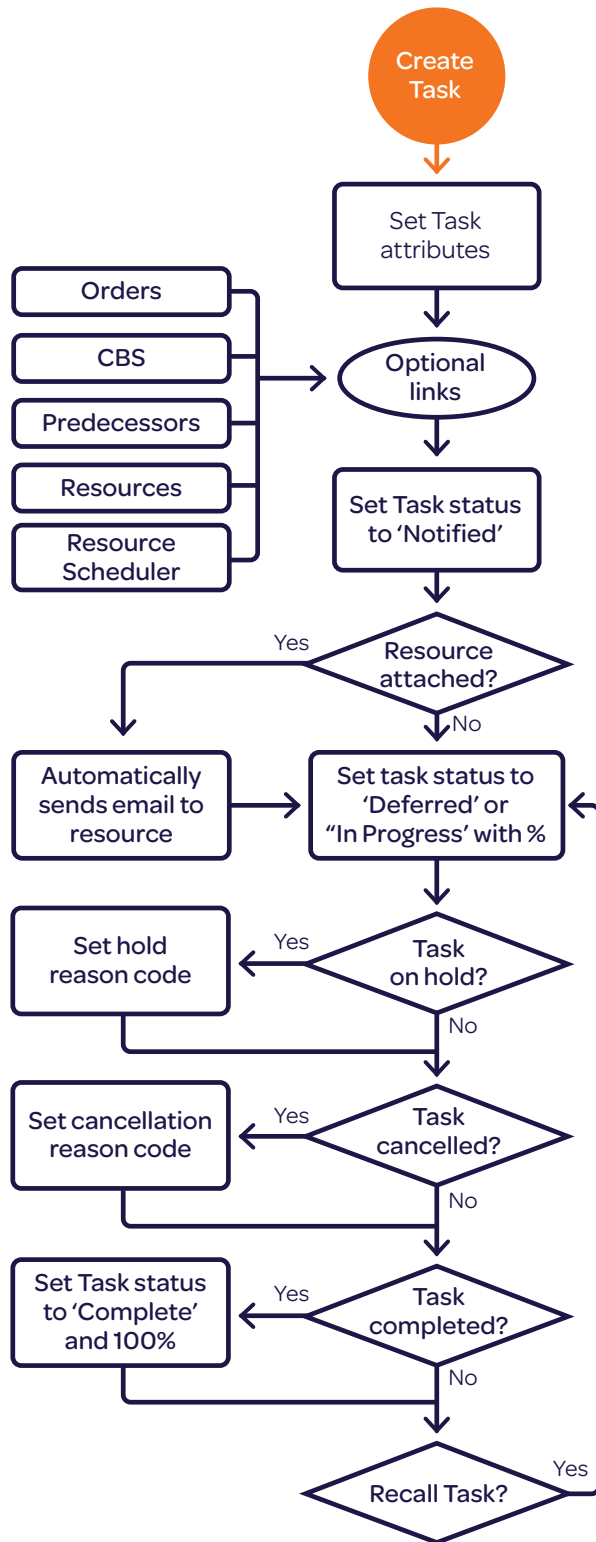
Importantly, Project Tasks delivers the framework you need to efficiently allocate resources — such as personnel/employees, plant equipment or contractors — to tasks. Through Resource Management, you can also use generic resources, resource your teams, and accept and decline workflows.

Project Tasks also manages communications with your resources. As time frames change and milestones are impacted, it delivers instant notifications to keep all allocated resources fully informed.

Find Project Tasks on the Resource Scheduler. Email key task details to allocated staff in advance of the scheduled work and attach calendar appointments that include the task details.

Other key features of Project Tasks include:

- an intuitive and logical task workflow
- Resource Scheduler for graphical visualisation and task rescheduling
- a rescheduling tool that automatically reschedules task time frames and resources where capacity clashes are identified
- the ability to copy a task profile from an existing project
- the ability to link tasks to create dependencies so that a task may not commence until the preceding task is complete



Visualise and reschedule planned tasks, then import your final plan back to Project

Scheduled project claims

The Project Claim Schedule creates invoices for customer billing, and can be used to develop a project budget.

Customer claim entry

Work begins once the project status is In Progress and you can raise claims to invoice the customer.

The Claim Control function facilitates three claiming methods:

- **Invoice method** — A direct invoicing method that does not consider certification or progress claims.
- **Progress invoices** — These are based on costs for time and materials, defined project stage completion, or percentage completion.
- **Progress claim** — This method creates a sales order invoice but holds the order back from invoicing and tax presentation until the claim is certified

Claim retention percentages

You can define retention percentages for the overall project and for each claim, helping to ensure the customer does not attempts to retain more than the agreed values.

Claim entry

Enter claims manually or in bulk via an amount or percentage. Define these values against a master item or any of the sub-total or grand total lines of the claim, then apply pro rata across the appropriate sections of the claim.

Claim lifecycle

A typical claim lifecycle progresses through a number of stages, represented by the following statuses: Entered, Internal Approval, On Hold, Submitted, Certified and Paid.

Actions

Actions record the various events for a claim, including status changes and other manual events that can be entered to add value to the claim process.

To assist you when you are reviewing a project, use the notes tool against each action to capture details, such as phone calls, letters and faxes.

Certification

A submitted claim is sent to the customer for their review and approval before they return a payment advice. This document states the claimed, assessed and retention amounts defined by the customer, and any prepayment drawdown amounts.

These details are entered against the claim via the certification process, where any differences are recorded against the claim details.

Various methods are available to certify claim amounts.

The defer method records the difference as a separate amount on each claim item. You can then discuss this with your customer and potentially offset in the future.

Customer retention release

If the customer retains funds during the claim process, you can request their release via a retention release order. This can occur at any time but typically happens towards the end of a project.

Claims enquiries

The Claims Enquiry screen makes it easy to find claims through powerful search parameters, including dates, statuses, types of claims and claims with variations.

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Details of Project Schedule Claims for Project: 000728

Project: 000728 Exploration project for client
Claim No.: CLAIM003 Status: Entered
Description: Progress claim

Master Values
Contract: 800000.00
Variations: 0.00
Total: 800000.00

Claim Details
Customer: 10ACCESS
Our Reference: CLAIM3
Cust. Reference: Q41344
Approval By:
Hold Reason:
Hold Until:
☐ Lump Sum
☐ Schedule of Rates
☒ Both/Undefined
Order No: 0
Created: 15-APR-2023
Internally Approved:
Submitted:
Certified:
Paid:
Retention Release:

Current Claim

	Total Claim	Claim Amount	+ Def Claimed	Claim %	Retained	Paid
Submitted:	100000.00	100000.00	0.00	12.50%	0.00	0.00
Expected:	100000.00			12.50%		
Certified:	0.00	0.00	0.00	0.00%		
Deferred:	0.00			0.00%		

Other Claims

	Total Claim	Claim Amount	+ Def Claimed	Claim %	Retained	Paid
Submitted:	300000.00	300000.00	0.00	37.50%	0.00	250000.00
Expected:	300000.00			37.50%		
Certified:	0.00	0.00	0.00	0.00%		
Deferred:	0.00			0.00%		

Total All Claims

	Total Claim	Claim Amount	+ Def Claimed	Claim %	Retained	Paid
Submitted:	400000.00	400000.00	0.00	50.00%	0.00	250000.00
Expected:	400000.00			50.00%		
Certified:	0.00	0.00	0.00	0.00%		
Deferred:	0.00			0.00%		

Create and submit Project claims



Income

In addition to capturing incurred costs, Project records income earned. Recognise income by posting an invoice in Accounts Receivable, manually raising a sales order, or generating a progress invoice or claim.

Invoice income category

Income transactions are posted to the project as a “credit” in an income category. You can have multiple income categories on a project.

Progress invoices

Project calculates invoices for time-and-materials projects using costs recorded against the project.

Generate invoices in stages using an invoice schedule based on either a fixed amount or a percentage complete.

Progress claim

A sales order invoice is created for progress claims but is held back from invoicing and tax presentation until the claim is certified.

Profit

Progressive profit take-up is often used on long-term projects. Project uses a “percentage of completion” method to determine the profit to take. If no profit is taken up during the project’s lifecycle, 100% of the profit is taken up when the project is closed.

Profit take-up methods

To suit different types of projects, there are four methods that can be used for taking up profit:

- **Cost-based method** — Assumes that the true completion status of a project is best measured using the actual costs as a percentage of the forecast cost
- **Sales-based method** — Assumes that the true completion status of a project is the amount invoiced against the contract value
- **Actual-based method** — Assumes a project is 100% complete and takes up all actual values
- **Cost/sales-based method** — Uses the cost-based method to calculate the percentage complete but does not allow you to take up more revenue than you have invoiced

Posting rules

Project allows you to set up different posting rules to the General Ledger based on user-definable fields and project types. This ensures postings end up on the correct balance sheet or profit-and-loss statement according to your business’s general ledger requirements.

Project management tools

Contacts and Functions

The Contacts and Functions feature records the names and details of people associated with the project for your team and your customers' team, helping to facilitate communication.

Issue Register

The Issue Register lists administrative events and activities that need to occur during a project, and assigns responsibility for events and activities to specific individuals. The My Issues function allows individuals to review allocated issues and actions across multiple projects; any issues or actions approaching their due date display in calendar view.

Sub-contracting

Project Sub-Contractor is a sub-module that provides functions and controls to initiate and manage outsourced project tasks.

Supplier agreements

Sub-contractor or supplier agreements create a commitment that you can break down across multiple cost categories.

Capture details of the tasks performed by sub-contractors as:

- scheduled rates or lump-sum payments
- retention percentages
- currency codes
- estimated start and end dates

Sub-contractor claims

Enter claims for work performed by sub-contractors using either a summary or detail method and assess them based on the terms and conditions of the sub-contractor agreement.

Entries include:

- claimed and assessed amounts
- reasons for any differences
- retention amounts
- tax amounts
- percentage of labour

Project Sub-Contractor automatically calculates the default retention amount and the assessed amount's tax component.

Once all amounts are accepted, you can raise a claim or invoice showing the claim number, amount, currency rate, date and pay-by date.

Variations

During the life of a sub-contractor agreement, either you or the sub-contractor may request changes to the terms or scope of work. Project Sub-Contractor facilitates multiple variations that can be made to agreements during the claim entry process.

Sub-contractor retention release

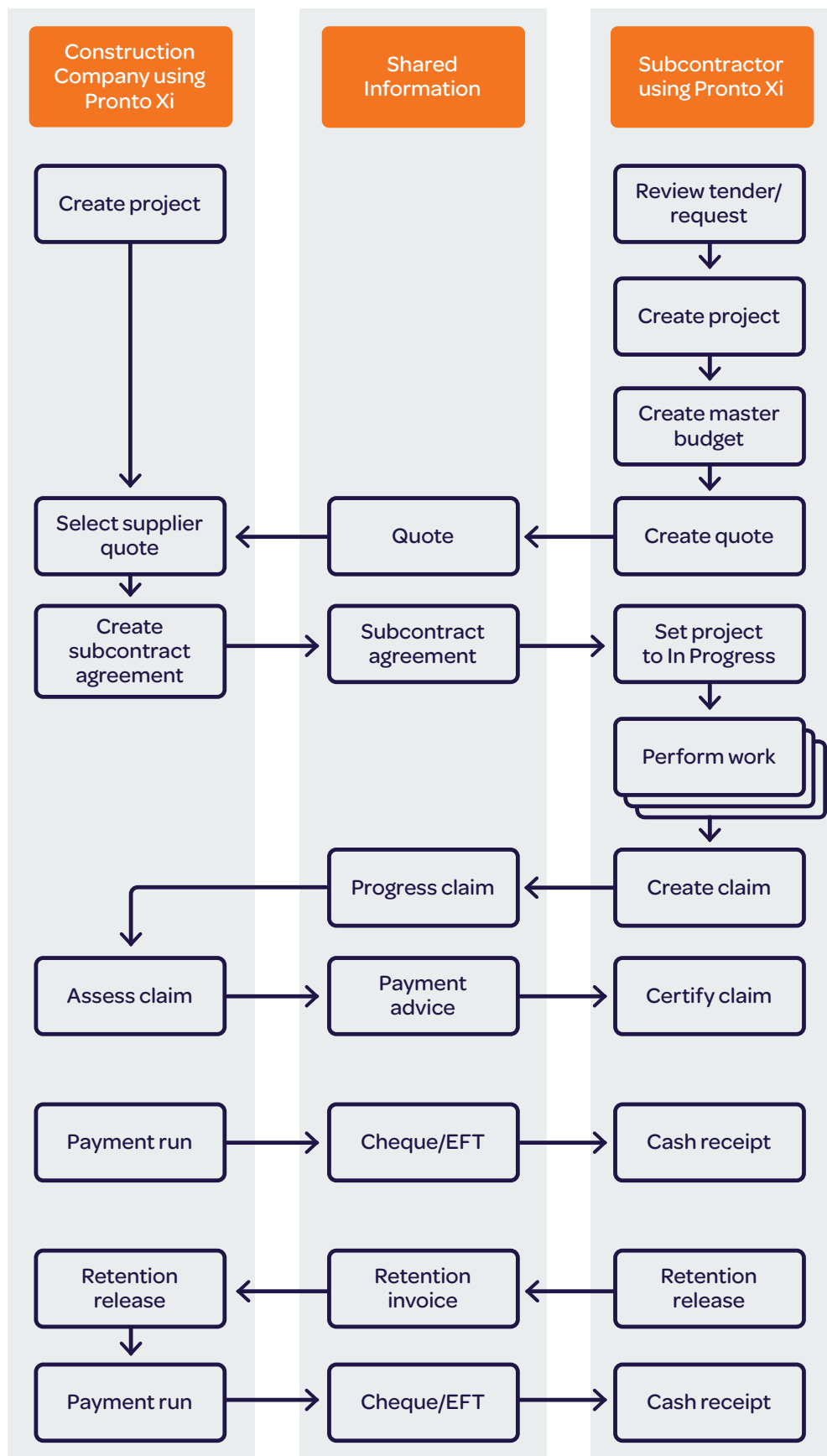
Release held retentions at any point in the lifecycle of a sub-contractor agreement. Any retained funds are held in a separate General Ledger account. When they are ready for release, Pronto Xi will automatically create a taxable payment for the sub-contractor.

Enquiry on sub-contractor agreements

A single project manager may be responsible for many sub-contractors and projects, making it important to have a powerful enquiry tool. With Project Sub-Contractor, you can filter sub-contractor data according to various criteria.

You can also filter agreements by type (such as lump sum, scheduled rates or supply), status, variation types or claim types. Use criteria to select matching sub-contractors.

The enquiry tool allows users to drill down into the detail of the record based on the criteria entered.



Security

Budget limits

Project Manager Limits enables you to set the budget or contract value amount for a manager to control at different stages of an individual project. You can also set an in-progress limit but not a completion limit.

Branch masking

Restrict users to specific projects based on branch masking rules to ensure branch data remains secure.

Credit limits

Project notifies you if a project budget takes a customer over their credit limit. You can receive a warning message but allow the project to continue, or you can leave the project at the quotation stage until approval to proceed is received from a credit officer.

With the Timesheet Control table, customise timesheet entry based on your business needs. Customisation options include:

- a variety of methods for calculating cost rates
- a variety of methods for calculating charge-out rates
- the option to integrate timesheets with Payroll, either via Projects or using the Resource Management module (if turned on)
- choice in the detail required for timesheet entry
- the ability to post additional on-costs (for example, superannuation or personal/carer's leave)
- timesheet approval

Add timesheet security requirements at different levels, such as authorising specified users to run reports or to maintain and set up timesheet control records.

You can also set rates for overhead recovery against labour costs and automatically post these.

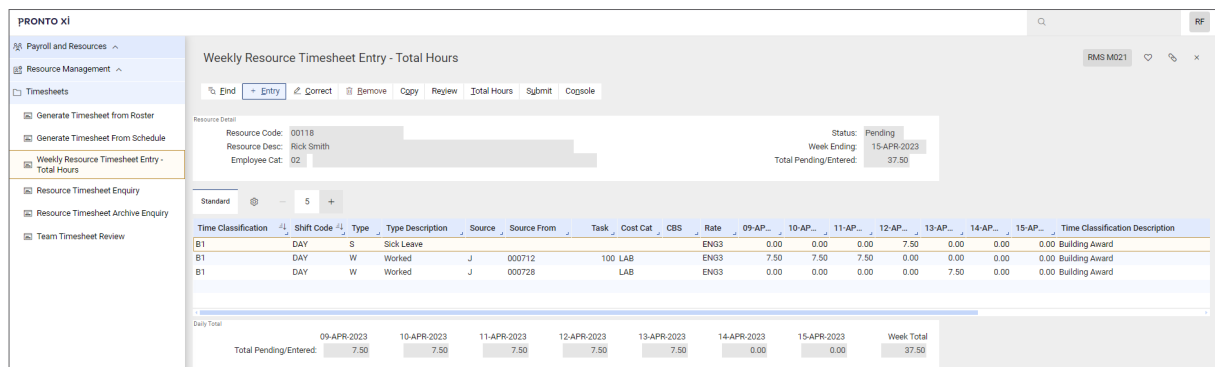
Timesheets

Time recording and timesheet entry

Project has a user-friendly time-recording function that allows organisations to record, track and authorise timesheets for work performed in Pronto Xi's Project and Service modules. Timesheet entry records and reports labour costs, hours and overheads against a project or service call.

Equipment cost and charge-out rates

Assign an equipment resource by default cost and charge-out rates for different periods (for example, per day or week). When you enter timesheet transactions against the equipment resource, the default cost and charge-out rates are easily posted to the project or service call.



Time Classification	Shift Code	Type	Type Description	Source	Source From	Task	Cost Cat	CBS	Rate	09-APR-2023	10-APR-2023	11-APR-2023	12-APR-2023	13-APR-2023	14-APR-2023	15-APR-2023	Time Classification Description
B1	DAY	S	Sick Leave	J	000712	100 LAB	EN03		0.00	0.00	0.00	7.50	0.00	0.00	0.00	0.00	0.00 Building Award
B1	DAY	W	Worked	J	000728	LAB	EN03		0.00	0.00	0.00	0.00	0.00	7.50	0.00	0.00	0.00 Building Award

Daily Total	09-APR-2023	10-APR-2023	11-APR-2023	12-APR-2023	13-APR-2023	14-APR-2023	15-APR-2023	Week Total
Total Pending/Entered	7.50	7.50	7.50	7.50	7.50	0.00	0.00	37.50

Create a timesheet entry in Resource Management and link to Projects

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Facilities Management > Tendering / Forecasting > Tenders

Tenders 0000002 Upgrade of main switchboard

TEND 0001

Find + Entry Correct Remove Audit Notes To Do Register Project Activities Actions Cost Breakdown Forecast

Identifier Tender No.: 0000002 Status: Entered Description: Upgrade of main switchboard Activities

Details Customer: 10LOCAL Generic Company Pty Ltd CRM Account: Our Contact: Bill Bobbie Tender Officer: MEL Melbourne Office Estimator: KM Kevin Mc Peter Branch: MELB Melbourne Site Location: South Bank App Type: 05 Warehousing Days Valid: 60 Reference: REF1/1 Project Type: M Marketing Work Type: E Electrical Rating: 2 Priority: 1 Project: Won By:

Values Tender Value: 40,000.00 Overall Value: 0.00 Profit: 17,500.00 Margin Rate: 43.75% Win Potential: 75.00 Go/Win Factor: 30.00 Rated Value: 9,000.00 Rated Margin: 3,937.50 Win Factor: 0.2250 Client Material: 15,500.00

Dates Document Due Date: 15-APR-2023 Tender Close Date: 15-JUN-2023 Expected Start Date: 01-AUG-2023 Site Possession: 15-JUL-2023 Expected End Date: 31-AUG-2023 Last Contact: Last Change: 31-MAR-2023

Notes To Do Register Contacts Functions/Names Master Items Master Budget Actions Status Audit Cost Breakdown

Manage all activities in the Tender process

Tenders

Tender Management manages future prospects, tenders and their associated contracts.

With Tender Management, you can forecast probable contract values and margins on tenders, current jobs and service contracts.

Once the tender is won, the data flows seamlessly into the linked project.

Key features of Tender Management include:

- go/win factor
- the ability to build a detailed Cost Breakdown Structure to capture tender-related costs
- history of changes to tender
- notes associated with tender or prospect
- a to-do register that itemises responsibilities and timeframes
- forecasting and phasing of sales and margins
- tender and prospect reports



About us

PRONTO

SOFTWARE

We are an Australian developer of award winning business management and analytics solutions. Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That's why for more than 45 years, over 1,500 Australian and global organisations, across a wide range of industries, have trusted Pronto Xi to simplify their most complex challenges.

With headquarters and our Development Centre located in Melbourne, we have support offices and consultants based across Australia, as well as a global network of Resellers and Solution Partners. Specialised business units within Pronto Software have the expertise to assist you with pivotal technology – Digital Transformation with Pronto Woven, Cloud and Hosting services with Pronto Cloud and Business Intelligence solutions with Pronto iQ.

When you choose Pronto Software, you gain a team with deep industry experience, giving us the ability to understand your specific needs and build innovative solutions that drive business growth and revenue.

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