PRONTO XI

Applications Overview

Sales

Part of the Distribution application

Trademarks

Disclaimer

This document contains statements related to our current and future developments that may constitute forward-looking statements. They are subject to changes and may be available in a Pronto Xi 780 service pack or future release of Pronto Xi. All diagrams, drawings, product screenshots and any other types of visualisations in this document, use demo or synthetic data created for display purposes only.

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Sales

Sales order processes? Inventory and finance system integration? They've never been easier, thanks to Pronto Xi Sales

Sales is your go-to tool to simplify sales processes, helping you generate even more sales for your business.

It has numerous user-definable options to meet your specific requirements, and gives you the ability to tailor the entry screen and every stage within the order lifecycle process.

Whether you're dealing with large order volumes or highly configured product environments, scalable order entry solutions are a necessity. Sales' order templates and copy features deliver an optimised approach to order processing that empowers your sales team.

Manage every distribution aspect — from forward orders, quotations and consignments to warehouse transfers and returns — within simple, intuitive screens. Drill-back functionality and clear visibility of inventory and costs give you a 360-degree view across your distribution network.

Key features include:

- user-definable order entry screen
- bill of materials (BOM) configuration capability
- automatic inventory allocation
- internal transfer/work orders for unavailable inventory
- management of kits
- credit checking and display at order entry/edit
- multiple warehouse capabilities
- direct links between sales orders, purchase orders and work orders
- automatic freight calculations
- full sales history retention
- item alternatives and multiple units of measure
- full backorder management

Sales order integration

Sales fully integrates with Pronto Xi's Inventory, Accounts Receivable, General Ledger and Customer Relationship Management modules. When a sales order is updated, available inventory, customer data, sales history, inventory movements and relevant General Ledger accounts are automatically updated across Pronto Xi.

Where electronic data interchange (EDI) is required, Pronto Xi EDI delivers sales order automation when files are imported. You'll find automatic sales order creation in other modules, with Service, Rental and Project providing bulk creation processes based on agreed billing cycles.

Sales order entry and maintenance

Configure sales order entries to match your business processes and speed up order entries.

Sales order header

Once the customer is selected, the sales representative, price level, territory and available credit are automatically applied to a sales order. Integration with Accounts Receivable ensures a rapid sales order entry process without data duplication and errors.

Sales order lines

Upon entering items, the salesperson can view extensive inventory information, including pricing and availability. If an item is unavailable, Sales displays alternatives that might be of interest to the customer.

You can also record additional costs associated with fulfilment and charges for freight, packaging, handling or any other recoverable costs.

Sales order conclusion

Once all items are entered, Sales presents various options to process the order.

If the ordered items are available, the picking slip for this sales order is ready to be printed in the allocated warehouse.

Create and update sales order lines with detailed costs and stock information

Sales order types

For convenience and flexibility, Sales handles a range of different order types. The order type defines the underlying business process and includes the following:

Normal sales orders

Track the progress of a sales order by its status. For example, if an order status is "Work Order Created", the item is currently being manufactured.

If ordered goods are unavailable in the warehouse that typically dispatches to the customer, you can check if they are available from other warehouses. If yes, dispatch the items automatically or transfer them to the originating warehouse.

Pronto Xi also creates work orders or purchase orders directly linked to sales orders for unavailable items. Drill down from the sales order to track the progress of these items.

Credit notes

Extensive credit note facilities are available in Sales.

Raise a full or partial credit, which will automatically load the original invoice lines and prompt you to process the type of credit. The type of credit can apply to the entire order or line-by-line.

You can also set limits for raising and approving credit notes and give appropriate warnings.

Available credit types include:

- credit and recharge of inventory
- net price/discount credit and recharge
- return to inventory
- inventory write-off
- credit of a charge
- inventory exchange
- issue new item free

Transfers

Sales allows you to create a transfer order to properly control and document the sequence of events necessary to move stock between warehouses.

In addition, Sales produces picking slips and transfer documents, enabling you to control the movement of goods.

Quotations

Sales produces quotations where it's easy to manipulate pricing based on cost, mark-up and other criteria. Inventory remains uncommitted until the quotation becomes an order.

Configure quotations for customer-specific requirements. Any adjustments or reconfigurations made during negotiations automatically recalculate the quotation details.

You can also have quotations pass through an acceptance phase before they convert to an order. If the quotation is rejected, you can enter the reason for the lost sale. Reports allow you to track and analyse lost opportunities, assisting you in identifying trends.

Internal sales

Accept orders from within your organisation within Sales. The department requiring the product raises an internal requisition, which is treated as an internal sales order, helping you maintain accurate inventory tracking and manage possible freight charges.

Forward orders

You can enter an order with a future delivery date without immediately allocating stock otherwise available for immediate sale. Inventory isn't allocated to a forward order until closer to the supply date.

You can also schedule regular deliveries for a forward order — for example, if you need to supply a customer with a quantity of items on the first of every month.

Contracts

When a customer has a contract to purchase goods or services to a maximum value and quantity, record these details on a contract order. During order entry, Sales allows the contract number to be entered and ensures that the contracted details are applied.

Proformas

A proforma order is a standing customer order that lists typically purchased items. You can directly access the proforma and select items from it, helping to minimise the administrative effort associated with a new customer sales order entry.

Return authorisations

Sales enables you to manage and track the entire lifecycle of customer returns. Efficiently log return authorisations and control how items are returned to stock, written off or recharged and credited — all within a single screen.

The returns management process allows you to:

- create a product return request

- review and approve the return request

- confirm the arrival of goods back into the warehouse

- return goods to your supplier for credit, replacement or repair

- return goods to the warehouse for resale

- create a work order to have goods repaired, reworked or disassembled

- raise a full or partial credit note for your customer

- keep track of returned goods and report on the reasons for returns to assist in forecasting future requirements, addressing areas of concern and recording the supply chain's performance
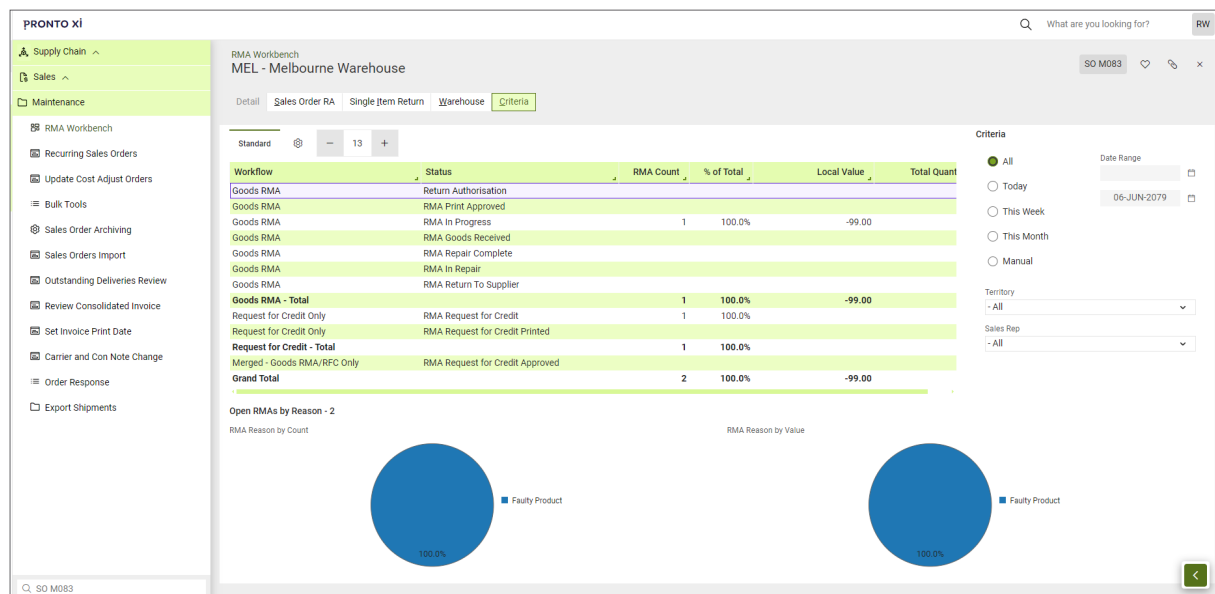
Streamline customer returns from authorisation to restocking or credit in one screen

Split deliveries

Schedule a sales order as a split delivery so that it is fulfilled progressively over time — for example, by a certain quantity every week. You can also specify delivery dates and the number of items for each delivery.

Recurring sales orders

Automate the scheduling of recurring orders, reducing administrative time. This is particularly useful for transactions with a predefined supply of goods and services over a given period.

Create billing templates and define the frequency for each invoice. The agreed price of goods and services is set at the creation of the invoice and takes pricing fluctuations into account.

When new invoices or orders are created automatically, Sales' built-in notification system will alert you via email.

Credit control

Sales generates a warning if a customer is "on hold", or over their credit limit or terms. The order status is then set to "on hold" or "credit hold", depending on the circumstances.

Set-up a credit officer to receive an automatic email notification when orders are placed on hold. They can then decide whether to release the order for dispatch.

Automate recurring sales orders to save time and streamline invoicing with built-in notifications

Backorder/inventory allocation

You can view sales orders to check for current inventory commitments anytime. When there is insufficient inventory to satisfy a customer's order, several options are available, depending on the customer's nominated backorder and your part shipment policy.

Some of these options include:

- **No backorders allowed** — A backorder will not be created for any item not supplied on the original order

- **Part shipments disallowed** — The order is held for dispatch until all items are available

- **Backorders allowed** — The backorder is supplied when the next order is placed, which merges the backordered items with the following order

- **Part shipments allowed** — Available items are dispatched and the remaining items are placed on backorder

For tracking ease, when part of an order is placed on backorder, Sales refers to the original order to identify the backorder.

Perform inventory allocations manually or automatically based on the parameters set. Items can also be automatically allocated to backorders upon receipt of goods from a purchase order or shipment.

Sales budgets

You can set sales budgets in Pronto Xi's Sales, Accounts Receivable or Inventory modules based on customer, item code, territory or item group.

Apply a user-defined spread factor across the year or set budgets for each period. The spread factor can consider seasonal fluctuations, geographic differences or other elements that influence sales at various times.

Sales order enquiries

A range of sophisticated enquiry facilities enables you to find an order easily. Make enquiries by account code, product, customer reference, warehouse, user ID, invoice number, credit note number, status, order number, delivery or consignment note number.

Sales rebates

Depending on your specific requirements, Pronto Xi calculates rebates based on percentages, flat values or quantities.

Customer rebates

Calculate rebates for a variety of combinations, including customer code, customer group, item code, item group and item group class. Rebates can also be forwarded to the customer in a number of ways.

When a sale is made to a customer, the invoice program determines if any rebate is due on the sale. When a customer rebate is applicable, Pronto Xi updates the relevant sales history files and makes provisional postings to the General Ledger.

In addition, the program runs a report before preparing statements to calculate the rebate amount earned by the customer.

Manual customer rebates

Calculate rebates by customer and item code using a percentage rebate rate. The rebate is applied to the sales order line shipped amount (excluding tax).

Royalty rebates

Calculate royalty rebates by item using either a value or a percentage. The cost of the sales order line is updated to include the calculated rebate, which affects the sales history.
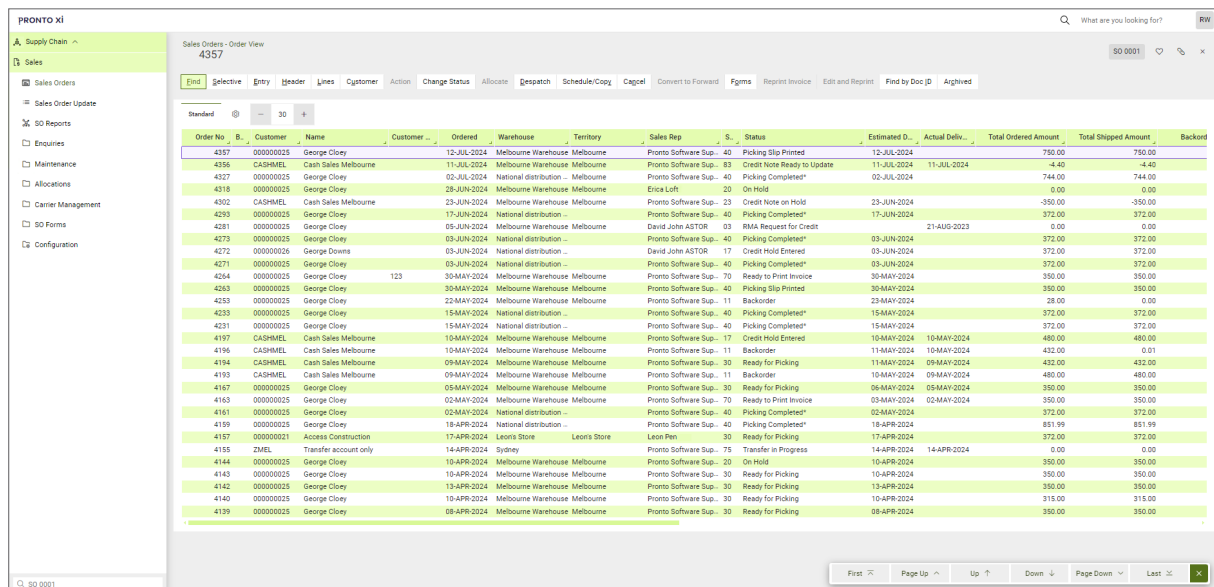
Sales order management

View of all your sales orders — with any status — on a single screen and gain significant efficiencies by having all the information in one place rather than navigating to separate enquiry screens based on order status. This is particularly useful if you manage large numbers of sales orders every day but do not use the Warehouse Management System (WMS).

Warranty

Quickly enter and track warranty claims and manage product returns with Warranty.

Warranty maintains notes, instructions and fault descriptions for the warranty work. In addition, you can:

• print invoice and consignment notes for the current job

• convert a quotation to an order

• view machine details for the current order

• raise, view or maintain purchase orders

• finish or cancel the current job

View all your sales orders, including their status and other details, on a single screen

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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.

info@pronto.net
1300 PRONTO (1300 77 66 86)

P pronto.net   in Pronto-Software   ▶ ProntoSoftware