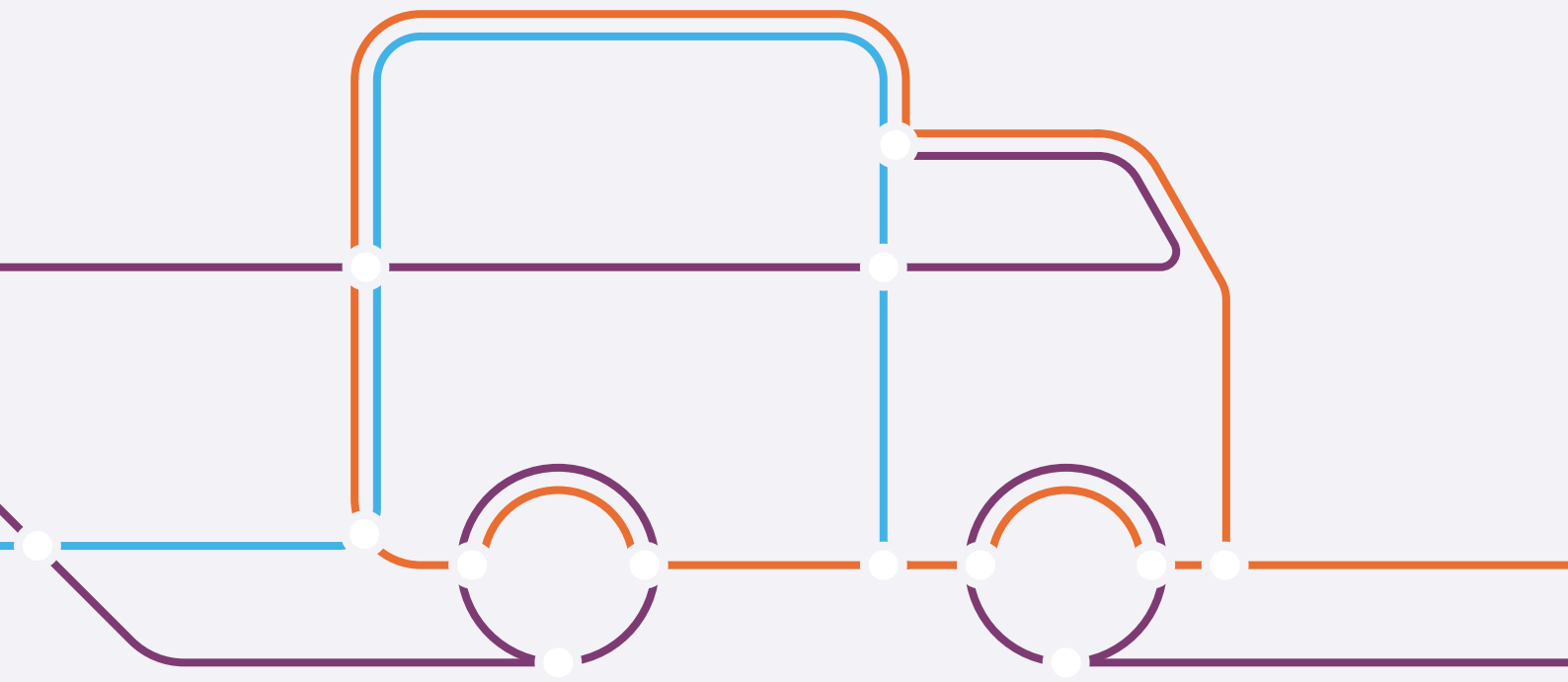


PRONTO xi



Pronto Xi  
Sales

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This document contains statements related to our current and future developments that may constitute forward-looking statements, or be subject to change. Features described may be added or removed in future releases of Pronto Xi and may not be available in all regions.

# Pronto Xi Sales

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# Pronto Xi Sales

## Bring your sales into order

With Pronto Xi Sales, handling a full range of sales order processes and integrating with your inventory control and financial management systems has never been easier.

Numerous user-definable options allow you to tailor the entry screen and all stages within the order lifecycle process to meet your specific requirements. High order volume through to highly configured product environments demand scalable order entry solutions. With the use of order templates and copy features Pronto Xi Sales delivers an optimised approach to order processing to enhance and empower your sales team.

Manage every aspect of distribution ranging from forward orders, quotations, consignments, warehouse transfers and returns within simple intuitive screens. Drill back features and clear visibility of inventory on hand and costs mean that you have a 360 degree view right across your distribution network.

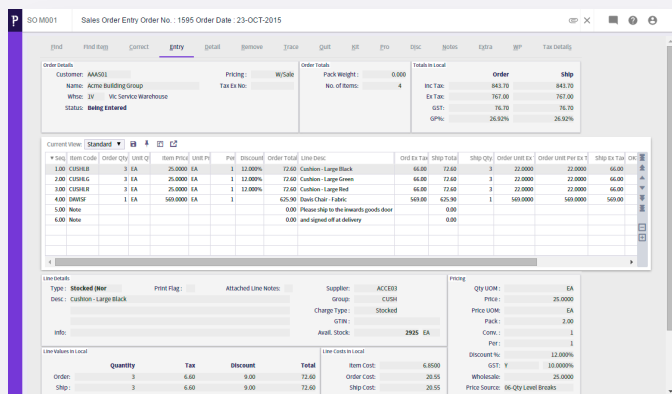
Pronto Xi Sales features include:

- User-definable order entry screen
- 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 selling units of measure
- Full back-order management

### Sales order integration

Pronto Xi Sales is fully integrated with Pronto Xi Inventory, Accounts Receivable, General Ledger and Customer Relationship Management. When a sales order is updated, available inventory, customer data, sales history, inventory movements and relevant general ledger accounts are all automatically updated by Pronto Xi.

Where Electronic Data Interchange (EDI) is required, Pronto Xi EDI delivers sales order automation at file Import. Automatic sales order creation is also found across other modules, Service, Rental and Project provide bulk creation processes based on agreed billing cycles.



Rapid order entry and all information at your fingertips

## Sales order entry and maintenance

You have the flexibility to configure sales order entry to map your business processes and ensure fast order entry.

### 1. Sales order header

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

### 2. Sales order lines

Items requested by the customer are entered and extensive inventory information is available to the salesperson, including pricing and availability. If an item is not available, alternatives that may satisfy the customer can be displayed. Additional costs associated with fulfilment can be recorded and you can choose to charge for freight, packaging and handling or any other costs that need to be recovered.

### 3. Sales order conclusion

When all the items have been entered, the options available at conclusion allow for a variety of further processing.

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

## Sales order types

Pronto Xi Sales handles a range of order types, allowing for increased convenience and flexibility. The order type defines the underlying business process and includes:

### Normal sales orders

You can track the progress of a sales order by its status. For example, if its status is 'Work Order Created', then the item is in the process of being manufactured.

If the goods ordered are not available in the warehouse that normally despatches to the customer, you can check if the goods are available from other warehouses. If so, the items can be despatched automatically or transferred to the originating warehouse.

Pronto Xi can also create work orders or purchase orders directly linked to sales orders for unavailable items. You can drill-down from the sales order to track progress.

### Credit notes

Extensive credit note facilities are available. A full or partial credit can be raised automatically loading the original invoice lines and prompting for the type of credit to be processed (entire order or line-by-line).

Limits for the raising and approving of credit notes can be set and appropriate warnings given. Credit types available 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

Pronto Xi Sales allows you to create a transfer order to properly control and document the sequence of events necessary to move stock between warehouses. The production of picking slips and transfer documents ensures control over the movement of goods.

### Quotations

As well as being able to produce quotations, you can easily manipulate the pricing based on cost, mark-up and other criteria. Inventory is not committed to the quotation until it is converted into an order.

Quotations can be configured for customer-specific requirements. During negotiation, all adjustments or reconfigurations automatically recalculate the details.

You can also have quotations pass through an acceptance phase before they are converted to an order. If the quotation is rejected, you can enter the reason for the lost sale. This information can later be reported on, allowing you to identify trends and causes for lost opportunities.

### Internal sales

Orders from within your organisation can be accepted. The department requiring the product will raise an internal requisition and this will be treated as an internal sales order allowing for accurate tracking of inventory as well as possible freight charges.

SO M001 Full Order Entry - Order Date: 23-OCT-2015

Lines Correct Address Instruction Financier Fax Customer Change Tax Exemptions Extra

Order

Customer: AAA501  
 Bill to:  
 Avail Cr: 9990303.00  
 Access:  
 Contact:  
 Type: N Normal  
 Cust. Ref:  
 Order No.: 1556

Customer Address

Name: AAA Shopping P/L  
 Address: Po Box 691  
 Virginia  
 QLD  
 Postcode: 4014  
 Phone: 07 3865 8180  
 Fax:

Detail

Delivery Date:  
 Tax Calc Level: L Grp:  
 Tax Exemptions Apply: N  
 Salesperson: DJA David John ASTOR  
 Warehouse: IV Vic Service Warehouse  
 Sales Type: IV Vic Service Warehouse  
 Customer Price: 0 Price Level 0  
 Terms Discount:  
 Sales Order Date: 23-OCT-2015  
 Carrier Code:  
 Project:  
 Category:  
 CRM:

Delivery Address

Name: Same as above  
 Address:

Delivery instructions

1:  
 2:  
 3:  
 4:  
 5:  
 6:  
 7:

Efficient customer service with configurable entry

### Forward orders

You can enter an order with a future delivery date without immediately allocating stock that would otherwise be available for immediate sale. Inventory is not allocated to a forward order until closer to the supply date.

Regular deliveries for a forward order can be scheduled if, for example, 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, these details can be recorded on a contract order. During normal order entry, Pronto Xi Sales will allow the contract number to be entered and ensure that the contracted details are applied.

### Proformas

A proforma order is a standing customer order that lists the items normally purchased. To save on the administrative effort associated with a new customer sales order entry, the proforma can be directly accessed by the data entry operator and items selected from it.

## Return authorisation

Pronto Xi Sales allows 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 conducted within a single Returns Management screen.

The Returns Management process delivers features such as:

- Creating a product return request
- Reviewing and approve the request to return
- Confirming arrival of the goods back into the warehouse
- Returning the goods to your supplier for credit, replacement or repair
- Returning the goods to the warehouse for resale
- Creating a work order to have the goods repaired, reworked or disassembled
- Raising a full or partial credit note for your customer
- This allows you to keep a close track of goods that have been returned and report on the reasons for returns to assist in forecasting future requirements, addressing areas of concern and recording the performance of the supply chain

SO M189 Enter Item Return

Entry Action Correct Find Lines Review Print Help Status List

Return Details

RA Number : 57590  
Status : **RMA In Progress**  
Customer : 1685  
Bill to : 1685  
Name : DMCUST3  
Invoice No. : 57561  
Qty Returned : -1  
Serial No. :  
Customer Ref : EMWQER  
Item Code : DE01  
Item Desc : Honey Fabric Office Chair

Fault Desc : Fabric colour inconsistent with  
shop floor demonstration model

RA Reason : 3 Stock Damaged  
Rec. Whse : MEL Melbourne

Name and Address Details

Name : DMCUST3  
Address :  
Postcode :  
Ph :  
Fax :  
DPID :

Entered By : bruce  
Order Date : 23-OCT-2015  
Received :

Manage the entire returns lifecycle with greater accuracy and control

## Schedule order

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

## Recurring Sales Orders

You can automate the scheduling of 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, defining the frequency for each invoice. The agreed price of goods and services is set upon creation of the invoice and takes into account pricing fluctuations.

When new invoices or orders are created automatically, the built-in notification system delivers email alerts.

## Credit control

If a customer is 'on hold', or over their credit limit or terms, the data entry person will be warned. Pronto Xi Sales will set the order status to either 'on hold' or 'credit hold' depending on the circumstances.

A Credit Officer can be automatically notified by email when orders are placed on hold, and may choose to release the order(s) for despatch.

SO M038 Recurrence Schedule for Sales Order Template 8822993194

Recurrence Order Attributes  
Order Days: 7  
Notify: N

Delivery Date Recurrence Pattern  
 Daily  
 Weekly  
 Monthly  
 Yearly  
Recur every: 1 week(s) on:  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday  
 Sunday

Delivery Date Range of Recurrence  
Start: 15-FEB-2017  
 End after: 10 occurrences  
 End by: 19-APR-2017

OK Cancel Remove Recurrence Notify-Email

## Backorder/inventory allocation

You can view sales orders to check for current inventory commitments at any time. When there is insufficient inventory to satisfy a customer's order, a number of options are available, depending on both the customer's nominated backorder and part shipment policies. Some of the options include:

- **No backorders allowed** – a backorder won't be created for any item not supplied on the original
- **Part shipments not allowed** – the order is held for despatch until all items are available
- **Backorders allowed** – the backorder is supplied when the next order is placed (merging the backordered items with the next order)
- **Part shipments allowed** – available items are despatched and remaining items placed on backorder

When part of an order is placed on backorder, Pronto Xi Sales refers to the original order to identify the backorder for ease of tracking.

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

## Sales budgets

You can set sales budgets in Pronto Xi Sales, Accounts Receivable or Inventory 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 take into account seasonal fluctuations, geographic differences or other things that influence sales at various times.

The screenshot shows the 'Customer Maintenance' form for customer 'AB-DEB'. The form is divided into several sections:

- Transaction Balances:** Shows a balance of 35,640.20 for Opening, Current, and Outstanding, and 0.00 for Future.
- Tracking Dates:** Last Sale: 24-AUG-2015, Last Payment: 17-SEP-2015, Account Opened: 09-JUL-2002.
- Credit Status:** Credit Status: Over Credit Limit, Credit Limit: 0, Credit Limit Override: 5, Customer Status: OK.
- Address Details:** Name: Ann Bill To, Address: 66 Bay Street, Sandringham, Victoria. Postcode: 3186, Tax Grp: Tax Exempt, Phone: 99989998, Fax: 99989979.
- Details:** Housekeeping Period: 0, Open Item, Price Level: 0, Warehouse: MEL, Sales Rep: JAS, Territory: 3M, Terms Discount: 3M, Current Disc: 5.00, Aging Code: Unspecified, List Change: 15-SEP-2015.
- Customer Definitions:** Customer Type, Industry, Marketing Flag, Company Flag, Price Category, Currency Code, Delivery Code, Delivery Seq, Master Account.
- Part Shipments:** Part Shipments: Y, Order Priority: 0, Price by Bill to: 0, Cust Sign. Ind.: Y, Billing Control: Z, Mailing Control, Freight Code, Industry Sub.
- Tax Details:** Tax Exemption: N, B, W, Z, C, D, X.

## Sales order enquiry

A range of sophisticated enquiry facilities enables an order to be found easily. Enquiries can be made by account code, product, customer reference, warehouse, user ID, invoice number, credit note number, status, order number, delivery and/or consignment note number.

## Sales rebates

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

## Customer rebates

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

As 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, the relevant sales history files are updated and provisional postings made to the general ledger.

In addition, a report is run prior to the preparation of statements to calculate the rebate amount the customer has achieved.

## Manual customer rebates

Rebates can be calculated 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

Royalty rebates can be calculated by item using either a value or a percentage. The cost of the sales order line is updated to include the rebate calculated, which affects the sales history.

## Pronto Xi Warranty

Pronto Xi Warranty allows you to easily enter and track warranty claims and manage product returns.

As well as maintaining notes, instructions and fault description for the warranty work, you can:

- Print invoice and consignment notes for the current job
- Convert quotation to order
- View machine details for the current order
- Raise, view or maintain purchase orders
- Finish or cancel the current job

## Sales order management

Non-WMS (Warehouse Management System) users can benefit from a single screen that displays an overall view of all sales orders with any status. Those who manage large number of sales orders everyday will gain large efficiencies from having all information in one place against navigating separate enquiry screens by status parameters.

Order No	Date	Customer	Name	Status	Whse	T	Delivery	Total Order	Reference	Actual Del	Invoice	Total Shipped	
100996	19/08/2018	001100	Rip Out	00	Berg	ENT	MEL	0M	19/08/2018		91.82	91.82	
100997	19/08/2018	000002	Edward Sheehanlight	11	Backorder	AJAN	2970	19/08/2018		89.00	16172012	0.00	
100993	19/08/2018	000002	Edward Sheehanlight	11	Backorder	AJAN	2970	19/08/2018		61.00	4056	0.00	
100992	15/08/2018	000002	Edward Sheehanlight	11	Backorder	MEL	3M	30/JAN/2019		266.00	1200901	0.00	
100991	20/JAN/2019	000002	Edward Sheehanlight	30	Rip Out	MEL	3M	20/JAN/2019		71.00	1200901	71.00	
100990	19/JAN/2019	000002	Edward Sheehanlight	30	Rip Out	MEL	3M	19/JAN/2019		274.00	1200901	274.00	
100989	19/JAN/2019	000002	Edward Sheehanlight	30	Rip Out	MEL	3M	19/JAN/2019		266.00	1200901	266.00	
100988	17/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	17/08/2018		-158.82	-158.82	
100979	17/08/2018	ENH	Equity and Loan for transfer	29	Trans	ENT	MEL	3M	17/08/2018		0.00	0.00	
100987	19/JAN/2019	000002	Edward Sheehanlight	11	Backorder	MEL	3M	19/JAN/2019		278.00	1200901	0.00	
100986	19/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	19/08/2018		0.00	0.00	
100985	17/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	17/08/2018		0.00	0.00	
100984	17/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	17/08/2018		0.00	0.00	
100983	17/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	17/08/2018		0.00	0.00	
100982	17/08/2018	CASH	CASH SALES (CHANGING)	00	Berg	ENT	MEL	3M	17/08/2018		0.00	0.00	
100981	21/JAN/2019	000002	Edward Sheehanlight	11	Backorder	MEL	3M	25/JAN/2019		110.00		0.00	
100980	20/JAN/2019	000002	Edward Sheehanlight	30	Rip Out	MEL	3M	20/JAN/2019		160.00	REF120044	160.00	
100979	14/08/2018	000002	Edward Sheehanlight	11	Backorder	AJAN	2970	31/MAR/2019		7700.00	1200901	0.00	
100978	14/08/2018	000002	Edward Sheehanlight	30	Rip Out	AJAN	2970	18/JAN/2019		7900.00	1200901	0.00	
100960	12/08/2018	000002	Edward Sheehanlight	18	FD	AJAN	2970	31/08/2018		8000.00	1200901	0.00	
100959	14/08/2018	000002	Edward Sheehanlight	18	FD	AJAN	2970	18/JAN/2019		5000.00	1200901	0.00	
100958	14/08/2018	000002	Edward Sheehanlight	17	CASH	ENT	AJAN	2970	20/NOV/2018		64627.00	1200901	64627.00
100956	14/08/2018	000002	Edward Sheehanlight	30	Rip Out	MEL	3M	13/08/2018		61.47	1000000	61.47	



### The right call

We're always ready to adapt Pronto Xi to perfectly fit your unique requirements.

For more information on what we can do for your business, contact us at 1300 PRONTO (1300 77 66 86) or find us at: [www.pronto.net](http://www.pronto.net)



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#### **About 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 40 years, over 1,700 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 Commerce 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.

Contact us to learn how we can help you achieve business goals: [pronto.net](http://pronto.net)