SOLUTION MANAGEMENT

Ostendo® Partner

Ostendo Software

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- FOOD & BEVERAGE PROCESSING
- WEBSHOPS
- CUSTOM MANUFACTURING
- ENGINEERING FABRICATION & JOBBING
- DISTRIBUTION & WHOLESALE
- SERVICE & MAINTENANCE

Software Solutions

Solution Management provides business system consulting, implementation and support services for manufacturers, wholesale distributors and service organisations.

We provide for:

- Evaluation of the status of your organisation relative to your business system and software selection requirements.
- Set up and implementation of business system software.
- Training and support.
- Customisation of standard forms, and development of company-specific reports.
- Custom scripts and EDI for business to business and web shop requirements.
- Custom Apps and integrations

We have provided business system software and improvement solutions for a wide range of organisations since 2001.

Our team has the diverse range of people and technical skills appropriate for working with today's business systems and database technologies.

We are committed to maintaining a high standard of project quality, health & safety and environmental awareness within our organisation.

We would welcome the opportunity to provide a proposal for your review, and to be of service to your organisation.

Ostendo Partner — Ostendo integrates directly with XERO, MYOB, QBO,MoneyWorks and Reckon

myob — Certified Consultant

xero — Business Partner

intuit quickbooks — Business Partner

MoneyWorks Seriously Good Accounting Software — Reseller

Reckon R — Professional Partner

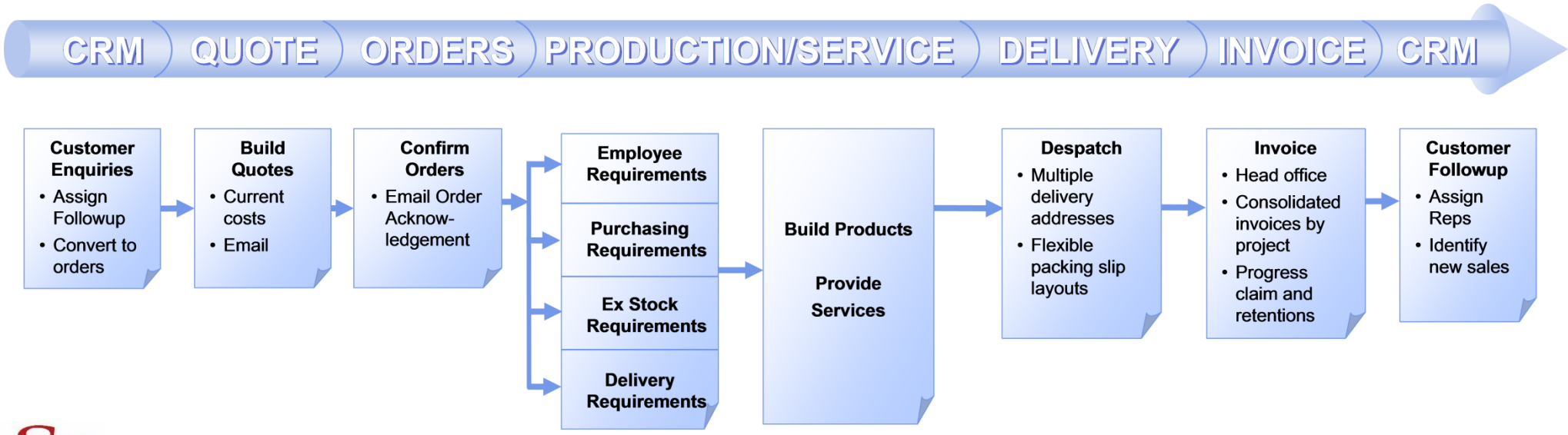
Contact: Solution Management
Australia - 1800 764 058 Mob: +61 412 802 899 support@solutionm.com.au
New Zealand - +64 9 446 1204 Mob: +64 29 446 1204 support@solutionm.co.nz

Introduction

Ostendo has been developed to allow companies to continue with their current accounting product and add enterprise-level functionality where it is needed.

Some of the key functions that Ostendo adds to an accounting package are:

- **Sales Management** – Quotations, sales confirmations, discount and quantity break pricing, customer specific pricing & CRM.
- **Inventory Management** – Requirements planning, barcodes, serial number, batch, expiry date & grade tracking.
- **Barcode Scanning** - Multiple warehouse and site management, scan to pick, EDI for 3rd party logistics contractors.
- **Webshops** - E-Commerce and customer portal solutions.
- **Manufacturing Management** - Custom bills of material, work orders, and scheduling.
- **Service Management –** Planned maintenance & service from the time equipment is sold.
- **Job Management** - Quotes, job costing, labour efficiency and tracking, mobility apps, process claims, and retention invoicing.
- **Mobile Apps** – Sales, Service and purchasing.



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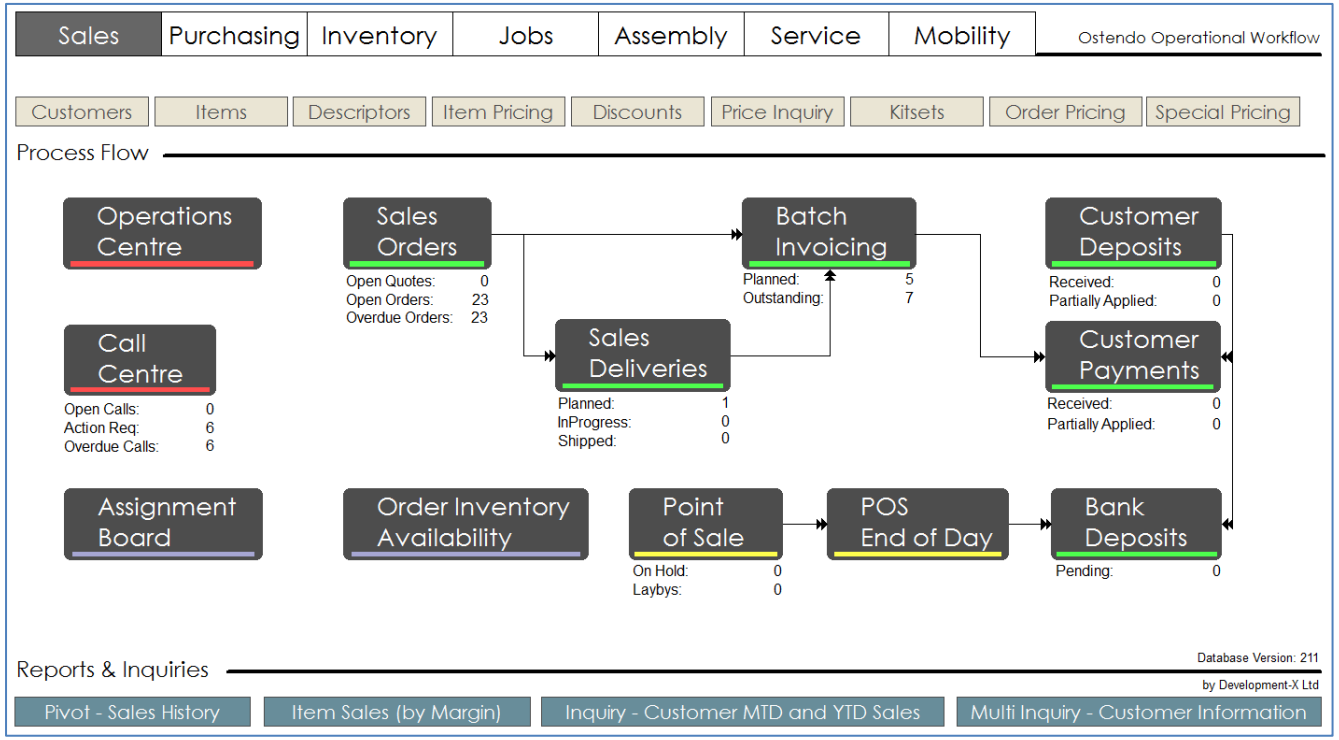
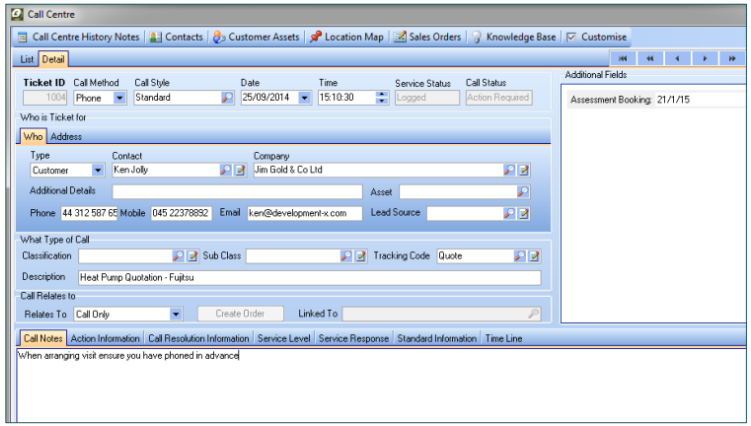
Sales Management





SALES FEATURES	
Manage every aspect of your customer relationship from prospect to business partner	✓
Complete call history and quote history including conversions to actual orders	✓
Build up quote estimates quickly	✓
Mark up materials, labour and subcontractor costs	✓
Edit text and select specific quote layouts for different customers	✓
Quickly convert quotes to orders	✓
Discount pricing based on product category, customer and customer group	✓
Quantity break pricing	✓
Special Pricing for promotions and negotiated prices	✓
Create customer-specific lists for repeat orders	✓

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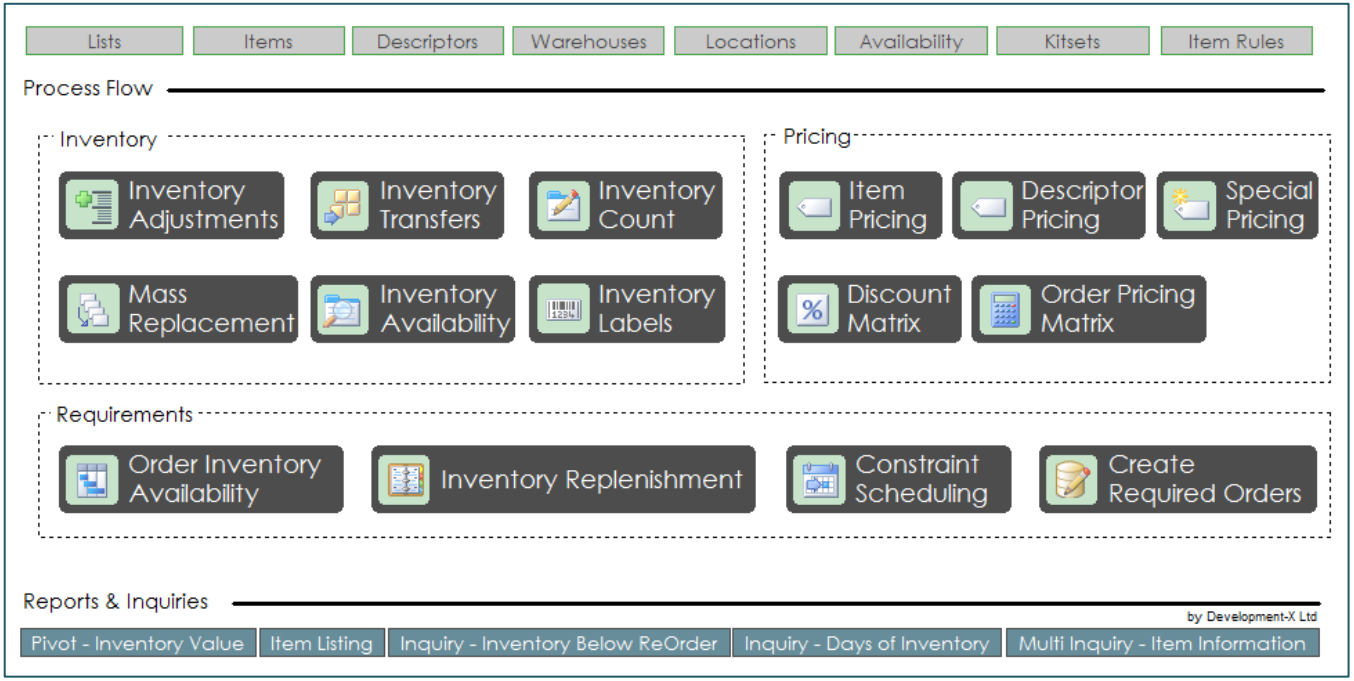
Inventory Management



INVENTORY FEATURES	
Traceability – Batch & Expiry Date Tracking	✓
Serial No., Revision, Grade, Colour and Size	✓
Multiple Sites, warehouses and locations	✓
Inventory forecasting and replenishment	✓
Supplier catalogues	✓
Landed costing and Multi-currency	✓
Create purchase orders directly from sales orders	✓
Create purchase orders using inventory replenishment (MRP)	✓
Apply purchase order approval for selected users	✓
Multi-level bills of materials	✓

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Barcode Scanning & Time Capture

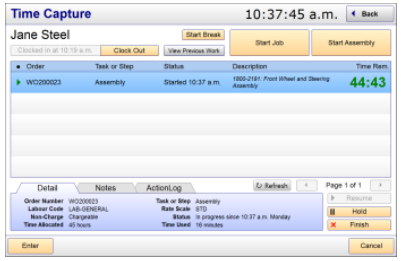
BARCODE LABELS

BLUETOOTH

RUGGED TABLETS

TIME CAPTURE

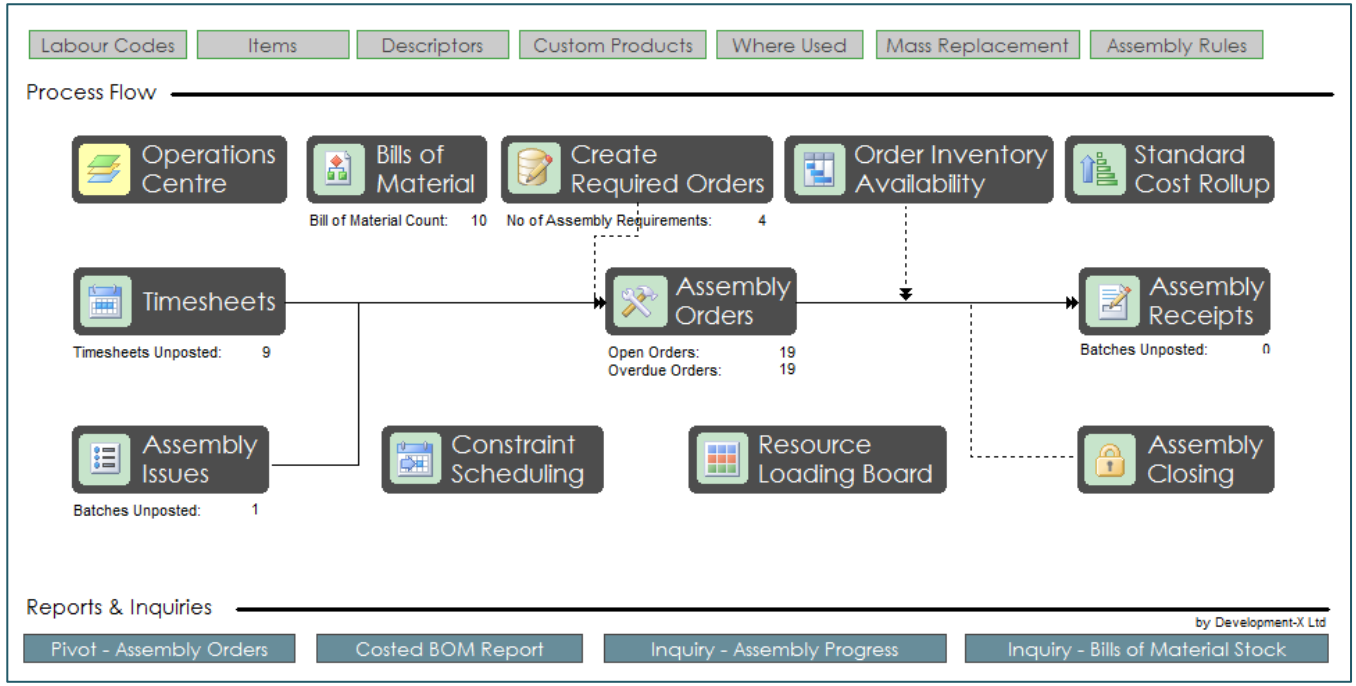
ATTENDANCE

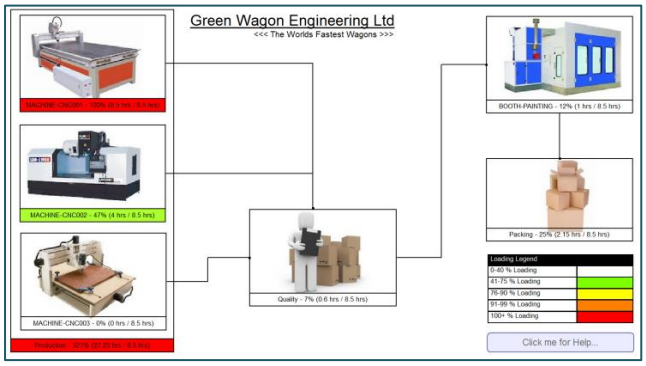


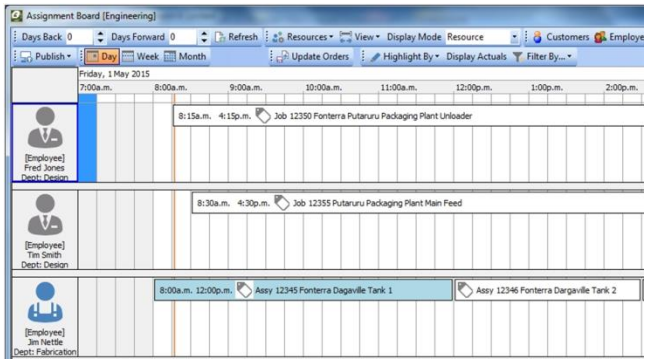
Time Capture provides real time capture of production and job times by person, task and labour code.

SCANNING FEATURES	
GS1, Item, Serial No. & custom barcode formats	✓
Efficient & accurate with optimised screens	✓
Scan stocktakes, transfers & adjustments	✓
Realtime order picking	✓
Batch, expiry date, grade & serial No. support	✓
Electronic pick list sorted by delivery run	✓
Live time recording by job, task and labour code	✓
Time tracking against machines	✓
Electronic preparation of attendance times	✓
Actual time vs job budget reporting	✓
Time Capture PL – Process Line times and efficiency	✓

Manufacturing Management

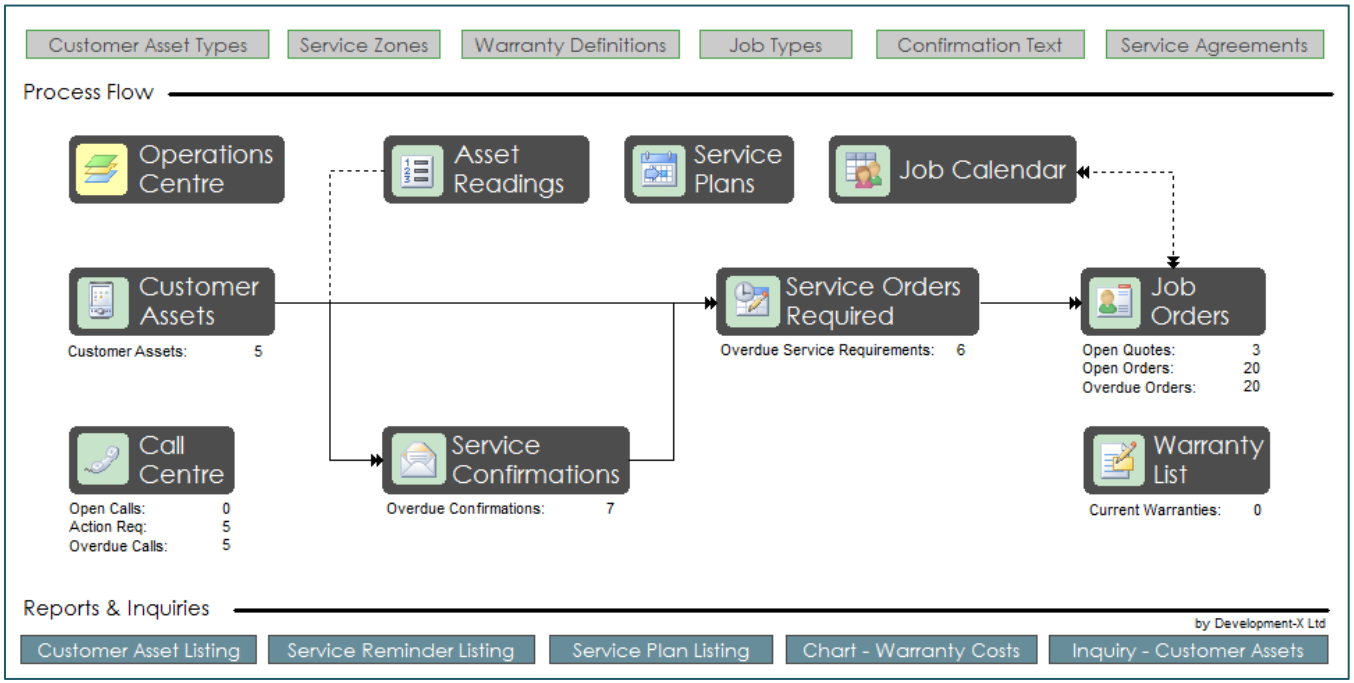






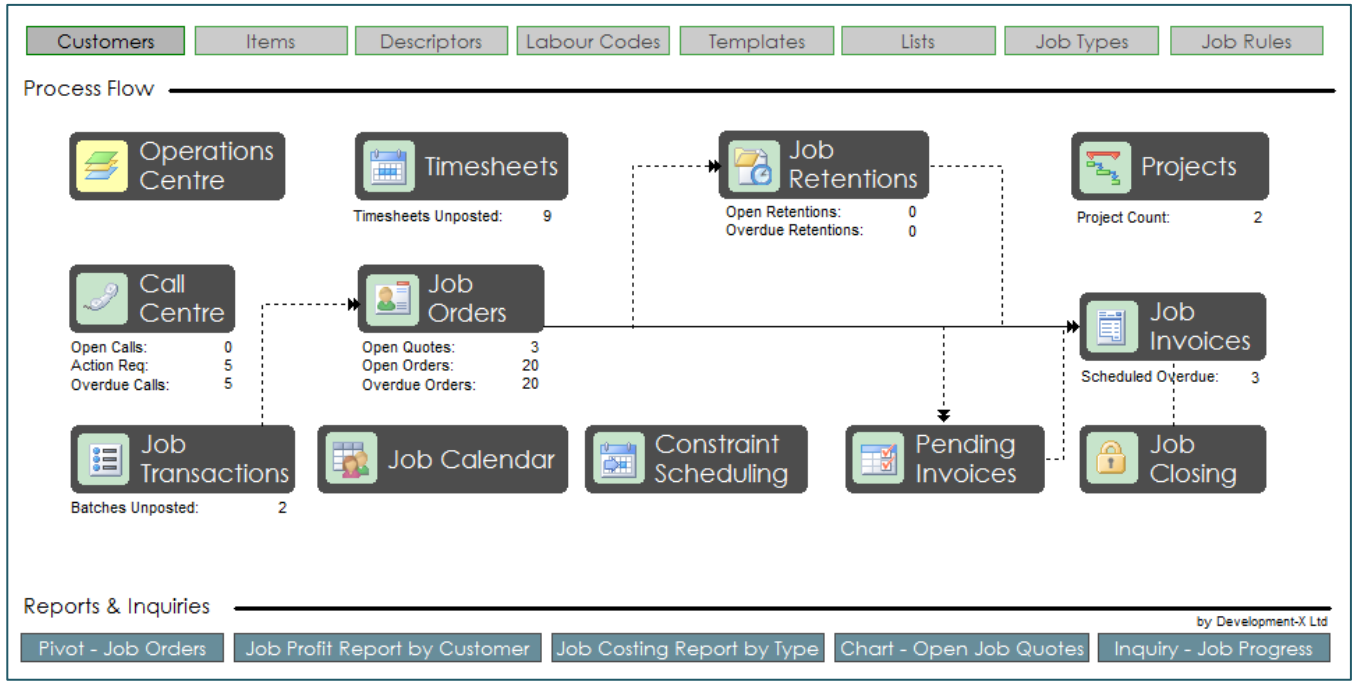
MANUFACTURING FEATURES	
Full traceability from raw materials to finished products	✓
Routing, setup times and scrap percentages	✓
Intermediate products and sub-assemblies	✓
Labour efficiency analysis	✓
Capacity planning and production scheduling	✓
Multi-level bills of materials, recipes and costing	✓
Manage co-products and by-products	✓
Custom product design, costing and pricing	✓

Service Management



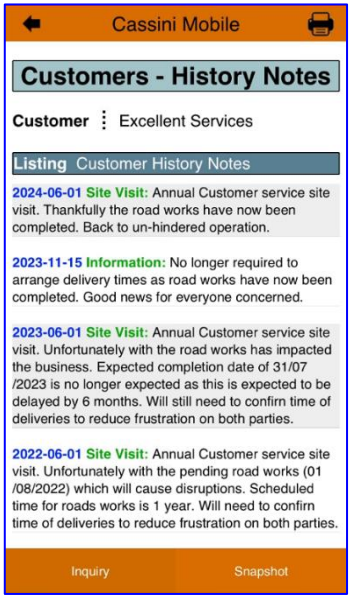
SERVICE FEATURES	
Create a customer asset at the time of sale	✓
Create maintenance plans and schedules	✓
Generate service reminder letters or emails	✓
Create jobs for all scheduled maintenance	✓
Track service history	✓

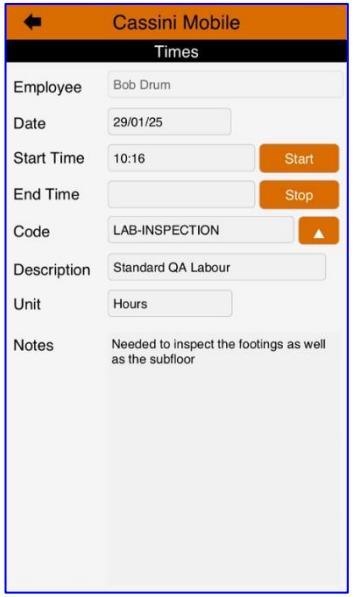
Job Management

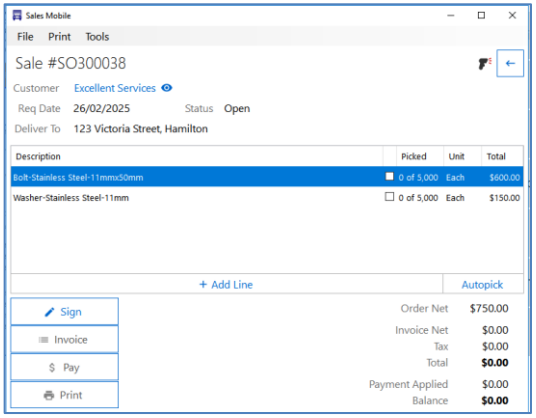


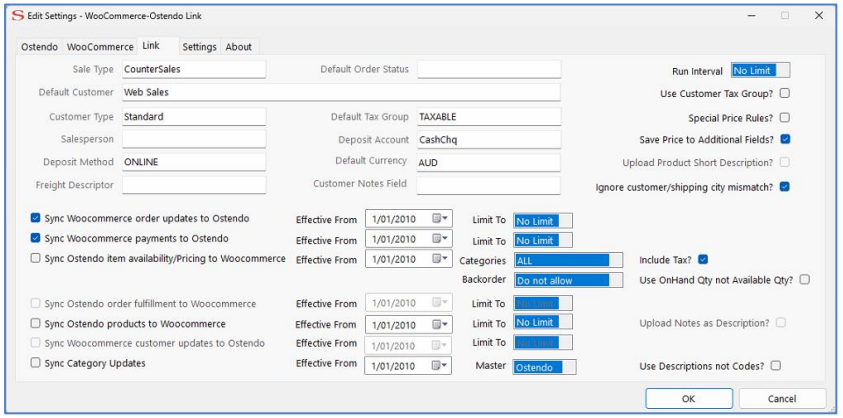
JOB FEATURES	
Break down jobs into tasks for quoting	✓
Build a custom product as part of a job	✓
Graphical job calendar for planning work	✓
Advanced customer, job and sales history search	✓
View real-time work in progress, time and cost	✓
Progress claims and retentions	✓
Set charge-up rates by customer or customer group	✓

Mobile Solutions & Integrations









OSTENDO FREEWAY	
Configurable checklists, photos and signatures.	✓
CRM, Job, Service, Safety & QA management	✓
Smartphone time, material & approvals	✓
Send jobs to onsite technicians	✓
Review history when onsite	✓
Operates without continuous internet	✓
CUSTOM APPS	
Sales Mobile	✓
Purchase Mobile	✓
Woo-Commerce – Ostendo Link	✓
Shopify – Ostendo Link	✓

Ostendo Features

INVENTORY & PURCHASING

- ✓ Multiple warehouses and locations
- ✓ Multiple units of measure
- ✓ Serial Number, batch and expiry date tracking
- ✓ Stock takes and location transfers
- ✓ Allows for negative stock
- ✓ Complementary Add-On Sales
- ✓ Pricing levels, quantity breaks and discounts
- ✓ Inventory Forecasting and Replenishment
- ✓ Purchase directly for Jobs and Assemblies
- ✓ Sales Orders or Stock
- ✓ Use limited Supplier Catalogues
- ✓ Rentals and Hireage
- ✓ Landed Costing and Multi Currency

JOB COSTING & PROJECTS

- ✓ Simple to Complex Job Estimating
- ✓ Real Time work in progress at all levels
- ✓ After Job costing and Actual job Profit Reporting
- ✓ Use Planned Costs based on Progress Claim
- ✓ Percentage to Project Job Profitability
- ✓ Budgeted, Actual and Projected Costs
- ✓ Progress Claims and Retentions Tracking
- ✓ Consolidated Invoicing by Project
- ✓ Use Standard, Average, Actual, Last, Buy Price or Calculated Costing Methods

MANUFACTURING, ENGINEERING & ASSEMBLY

- ✓ Choose a level of simplicity or Complexity
- ✓ Make to Order and make to stock
- ✓ Assembly Orders with or without Details
- ✓ Bills of Material unlimited Levels deep
- ✓ Includes Setup, Scrap Percentage, Resources
- ✓ Where Used Enquiry for bills of Material
- ✓ Mass Replacement/Substitution Utility
- ✓ Co-products and By-products
- ✓ Phantom Assemblies
- ✓ Routings

LABOUR AND JOB TRACKING

- ✓ Timesheets, Job sheets and Job Lists
- ✓ Planned Actual and Projected Labour time remaining by task, job or project
- ✓ Varying Employee Direct Costs can be linked to One Labour Code
- ✓ Varying Customer Labour Charge Out Rates
- ✓ Graphical Resource Job Scheduling Calendar
- ✓ Labour Capacity Views
- ✓ Data Collection

MOBILITY

- ✓ Tablet and Smart Phone options
- ✓ Work onsite without an internet connection
- ✓ Synchronise with head office when internet connected
- ✓ Send jobs to technicians while on site
- ✓ Record photos, signatures and checks onsite
- ✓ Complete time and material records onsite
- ✓ GPS tracking
- ✓ Monitor sales and performance data from your Android or IOS smartphone.

SALES, POS & SERVICE

- ✓ Consolidate Invoices for Jobs, Sales Deliveries and Recurring Invoices
- ✓ Sales Kitsets, Configured Items, Alternate Items and Add-on Sales
- ✓ Comprehensive pricing options
- ✓ Original and Extended Warranty Tracking
- ✓ Creates customer Service Asset after Selling Product or Service
- ✓ Service Reminder Letters or Emails
- ✓ Automatically Schedules Preventative Maintenance and Creates Service Jobs
- ✓ Point of Sale module

Ostendo Features

CRM, CALL CENTRE & QUOTING

- ✓ Tracks Quotes, Jobs, Orders, Invoices Payments and Deposits
- ✓ Activity Log for Emails, Calls, Meetings
- ✓ Integrated Call Centre Management for Date and Time Stamped Calls
- ✓ Complete Call and Quote History
- ✓ Expiry Date for Quotes
- ✓ Convert Quotes to Sales Orders or Change to Lost Status with a Reason
- ✓ Business Knowledge Base with FAQs

CUSTOM PRODUCTS & SERVICES

- ✓ Configured Products and Services
- ✓ Use templates, BOMs and custom scripting to create one off products
- ✓ Ideal for make to order custom products
- ✓ Import from AutoCAD and Solidworks design outputs
- ✓ Build products using features and options

REPORTING & TECHNICAL UTILITIES

- ✓ Inquiries, Statistics, Analysis, Pivot and Chart Views for all History
- ✓ Report Writer and scripting Engine
- ✓ Modifiable Windows Graphical User Interface
- ✓ Document and Image Management
- ✓ Spreadsheet with SQL Query Tool
- ✓ Data Import and Export
- ✓ Extensive HELP Menu and Graphical Workflows

BARCODE SCANNING

- ✓ GS1, Item Code, Serial No. & custom barcode formats.
- ✓ Barcode label printing including SSCC labelling, Aldi, Woolworths, Coles & Foodstuffs requirements.
- ✓ Rugged scanners and tablets
- ✓ Optimised screens with customer specific options
- ✓ Live order picking
- ✓ Batch, expiry date, grade and serial number support
- ✓ Scan stocktakes, transfers, adjustments, production issues, production receipts and sales order picks.

INTEGRATIONS

- ✓ Woo-Commerce - Ostendo
- ✓ Shopify - Ostendo
- ✓ Sales Mobile
- ✓ Purchase Mobile
- ✓ Power BI
- ✓ Customer portals.
- ✓ Supplier portals
- ✓ Foodstuffs, Woolworths, Coles & Aldi

IMPLEMENTATION PROCESS

- ✓ Process review, project scoping and planning
- ✓ Installation of Ostendo & test
- ✓ Initial data preparation, import and training
- ✓ Ostendo configuration & test
- ✓ User procedures for staff training
- ✓ On the job training by function
- ✓ Pilot run
- ✓ Pilot run review
- ✓ Go live change over
- ✓ Support

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