



Ostendo
Partner

SOLUTION MANAGEMENT

Ostendo Software

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FOOD & BEVERAGE
PROCESSING



CUSTOM
MANUFACTURING



DISTRIBUTION &
WHOLESALE



WEBSHOPS



ENGINEERING
FABRICATION & JOBBING



SERVICE &
MAINTENANCE

OSTENDO

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.

We have provided business system software and improvement solutions for a wide range of organisations since the 1990s.

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.



Auckland Chamber of Commerce Member



Standards New Zealand Member



Project Management Institute Member



Ostendo Partner



Certified Consultant
Ostendo links with MYOB, XERO, Sage Evolution, Moneyworks & Reckon.



Business Partner



Business Partner



Reseller



Professional Partner



SOFTWARE SOLUTIONS

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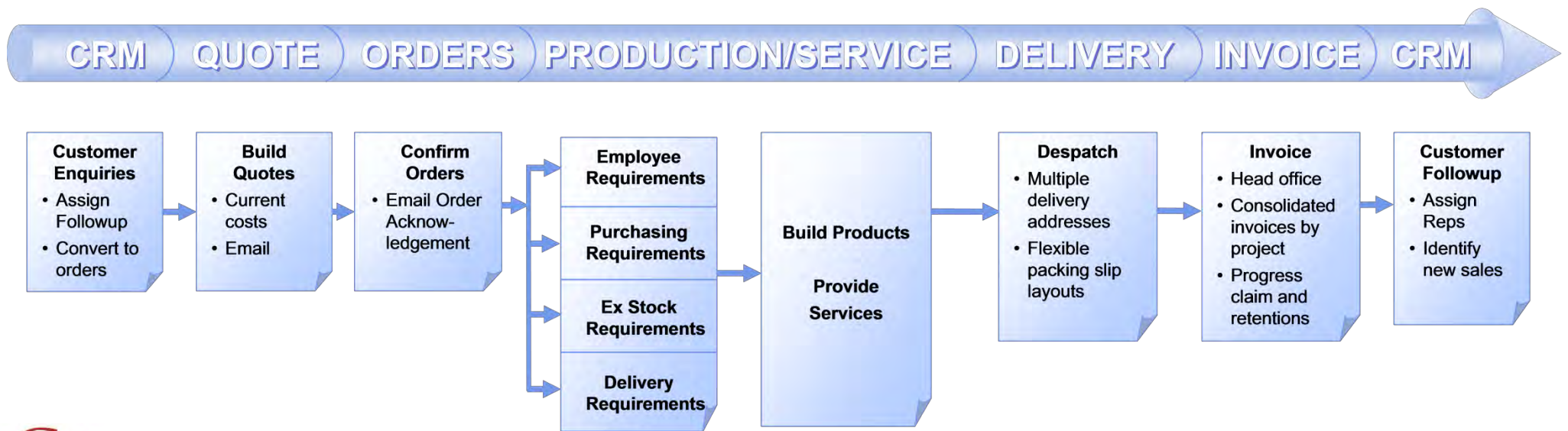
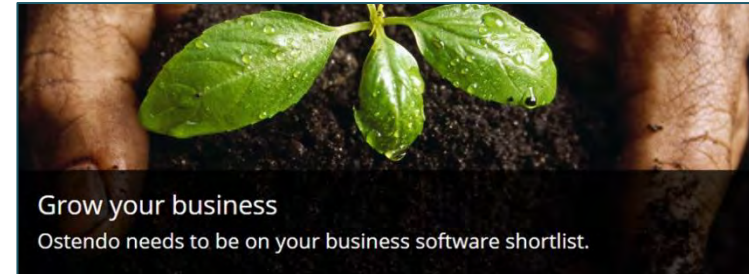
Mob: +64 29 446 1204

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; EDI invoicing; sales rep commissions; CRM.
- **Inventory Management** – Requirements planning; barcodes; serial number, batch and expiry date 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.
- **EDI** – Business to business electronic transactions and data transfer.



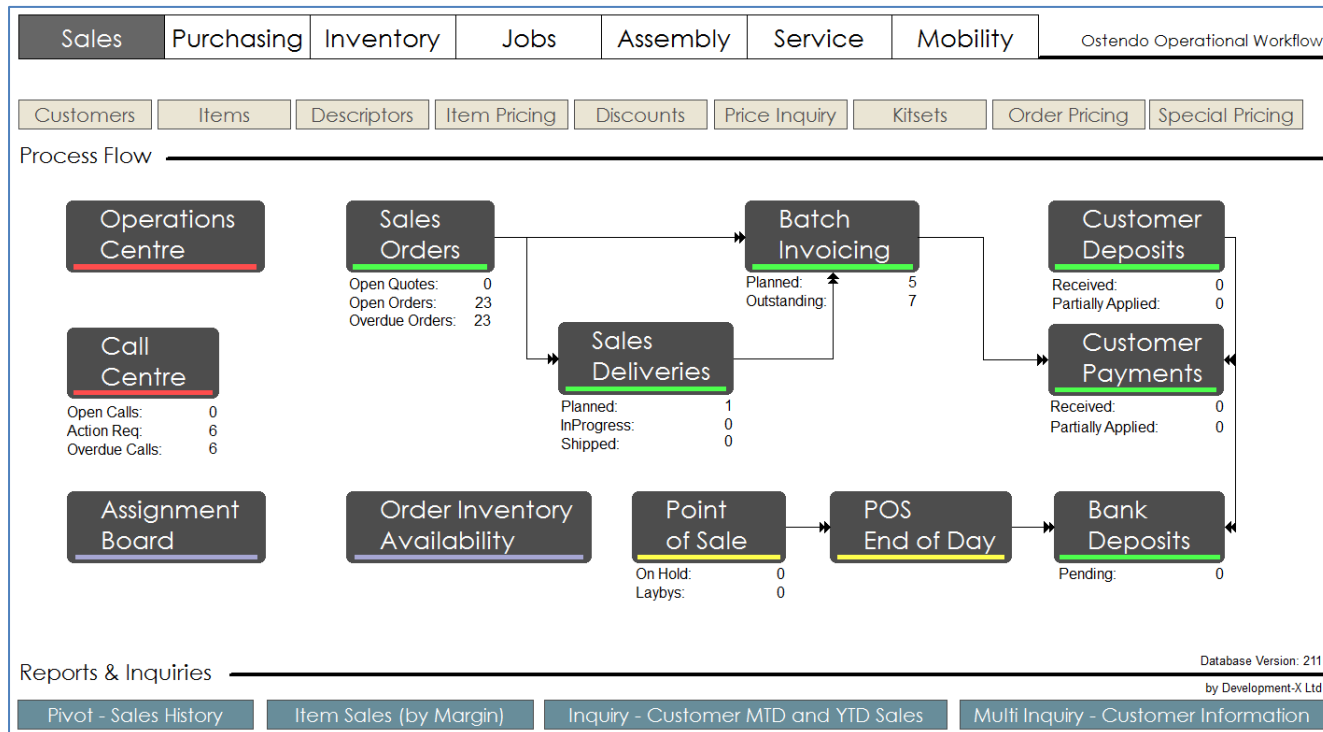
INTRODUCTION

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Sales Management



Call Centre

Call Centre History Notes | Contacts | Customer Assets | Location Map | Sales Orders | Knowledge Base | Customise

List | Detail

Ticket ID	Call Method	Call Style	Date	Time	Service Status	Call Status
1000	Phone	Standard	25/09/2014	15:10:30	Legend	Action Required

Who is Ticket for

Type: Customer
Contact: Kim Jolly
Company: Jim Gold & Co Ltd
Additional Details: Asset
Phone: 44 312 987 65 Mobile: 045 22378932 Email: ken@development-x.com Lead Source

What Type of Call

Classification: Heat Pump Quotation - Fujitsu
Sub Class: Tracking Code: Quote

Call Relates to

Relates To: Call Only
Create Order: Linked To

Call Notes: Action Information | Call Resolution Information | Service Level | Service Response | Standard Information | Time Line

When arranging visit ensure you have phoned in advance

Presented To:
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9A Williamson Ave.,
Devonport
AUCKLAND
0622

Solution Management Limited
P.O. Box 32-377
Devonport, Auckland, New Zealand
Telephone 09 446 1204 Facsimile 09 446 1205

Attention: Kevin Whitehead

SALES QUOTATION

Quote Number: SQ1291
Quote Date: 23/08/2014
Quote For:

Dear Kevin,
Thankyou for the opportunity to provide a quotation for your next licence renewal.

Code & Description	Unit	Qty	Unit Price	Ext Price
OSTAL	Each	1	\$250.00	\$250.00
Ostendo Annual Licence Renewal				
			Net Total:	\$250.00
			Tax Total:	\$17.50
			Total:	\$267.50

The quotation is valid for 60 days.
Trading terms are as attached with payment for invoices due on the 20th of the month following.

Yours Sincerely,

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 ✓



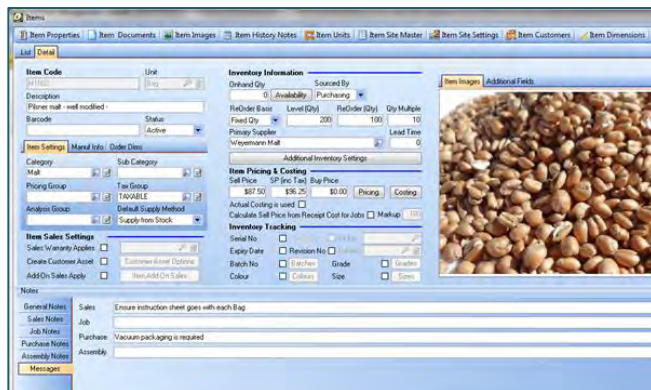
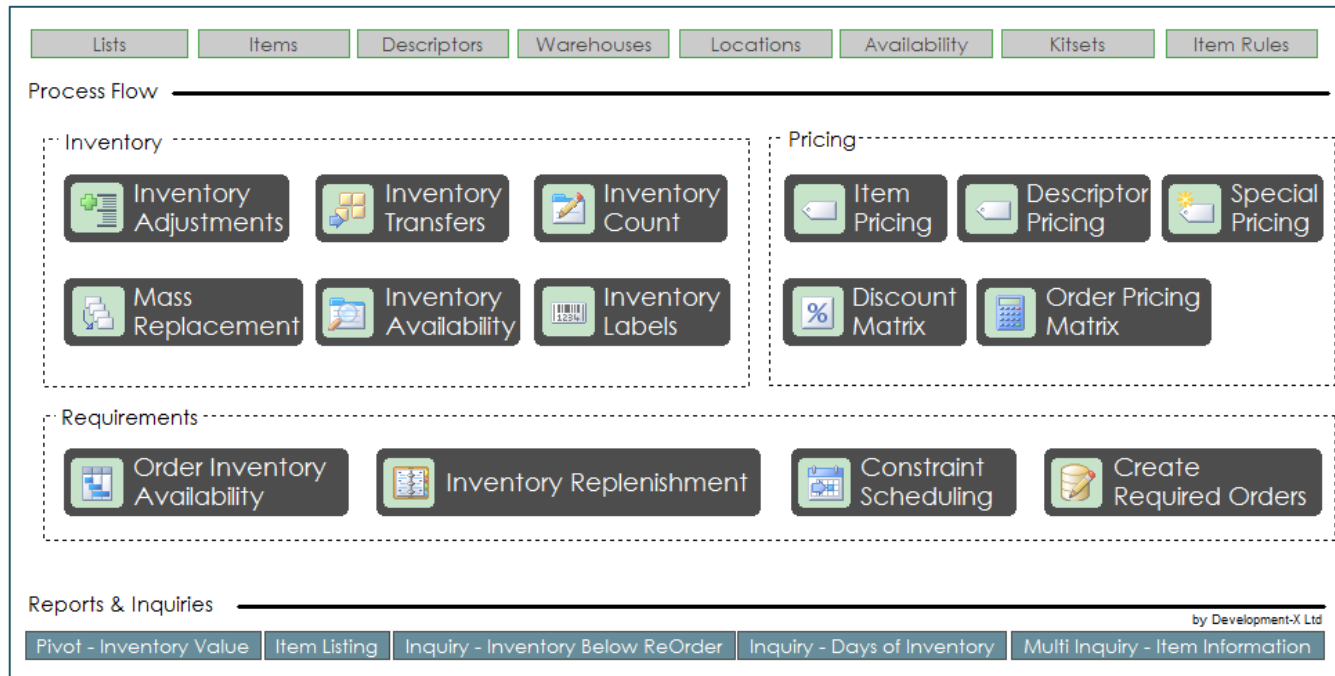
SALES MANAGEMENT

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Inventory Management



Inventory Availability

Items

Warehouses

Locations

Customise

List

Detail

Transaction History

Item Code

500001 25

Unit

Pkg

Description

Best-Scholar's Notebook 2-5

Barcode

1

Status

Active

Filtered by Site:

Inventory Information

Onhand Qty

Supply

Demand

Available

7

51

30

Next Supply Date

24/11/2014

Item Info

Pack Sizes

Onhand Qty

Supply

Demand

Available

7

51

30

Show Qty in Pack Size

Pack Size

Projected Availability Settings

Period Length

Weeks

Include Planned Orders

Inventory By Location

Projected Availability

Order Details

Date	Type	Class	Order No	Customer or Supplier	Order Qty	Remaining Qty	Original Unit
24/11/2014	Demand	Sales Order	50300035	Best Prices Trading Inc	50	38	Pair
24/11/2014	Demand	Sales Order	50300035	Best Prices Trading Inc	20	20	Pair
24/11/2014	Supply	Assembly Receipt	WD200032	Best Prices Trading Inc	50	50	Pair
24/11/2014	Supply	Assembly Receipt	WD200034	Best Prices Trading Inc	20	1	Pair

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	✓
Maintain multi-level bills of materials	✓



INVENTORY MANAGEMENT

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Barcode Scanning & Time Capture



BARCODE LABELS



Comprehensive barcode label formats and integration options

TABLETS



Windows 7, 8, 10 tablets
With built in scanner

BLUETOOTH



Blue tooth linked scanner

USB



USB cable scanner ideal for scanning close to a work station.

SCANNING FEATURES

Most barcode formats



Efficient & accurate



Scan stocktakes & inventory transfers



Realtime order picking



Serial No, batch & expiry date support



TIME CAPTURE FEATURES

No more time cards



No more manual entry for your attendance records



No more time wasted decoding handwriting



Jobs can be pre-assigned by supervisors



Record time for jobs by task and labour code



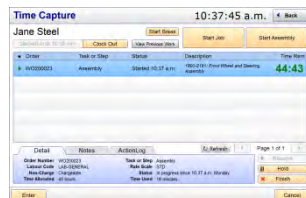
Time tracking against machines



TIME CAPTURE



ATTENDANCE



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



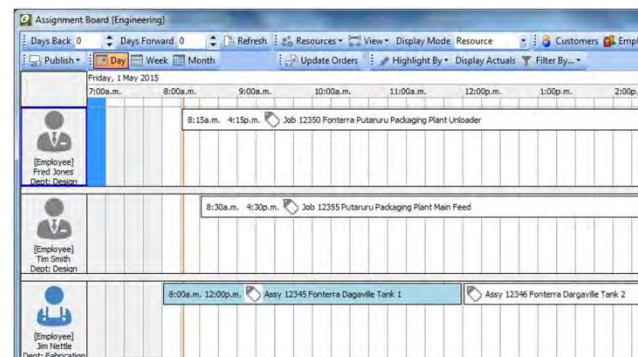
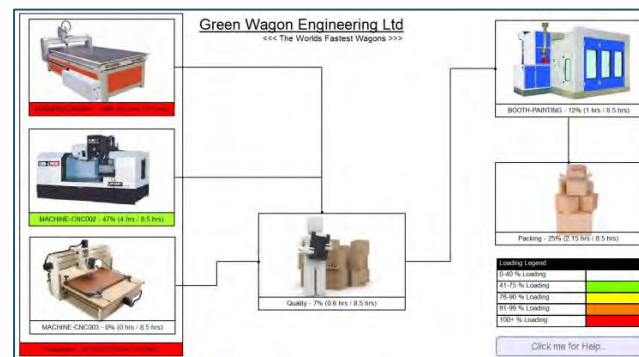
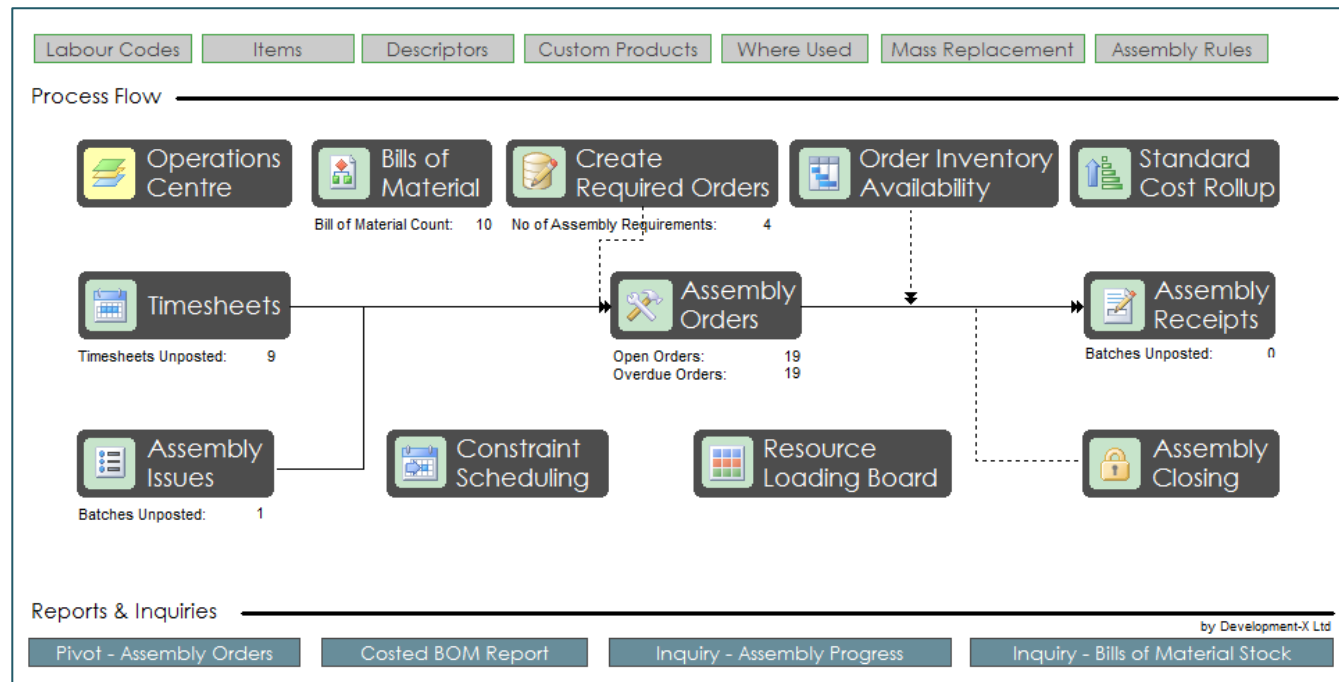
BARCODE SCANNING & TIME CAPTURE

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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 ✓



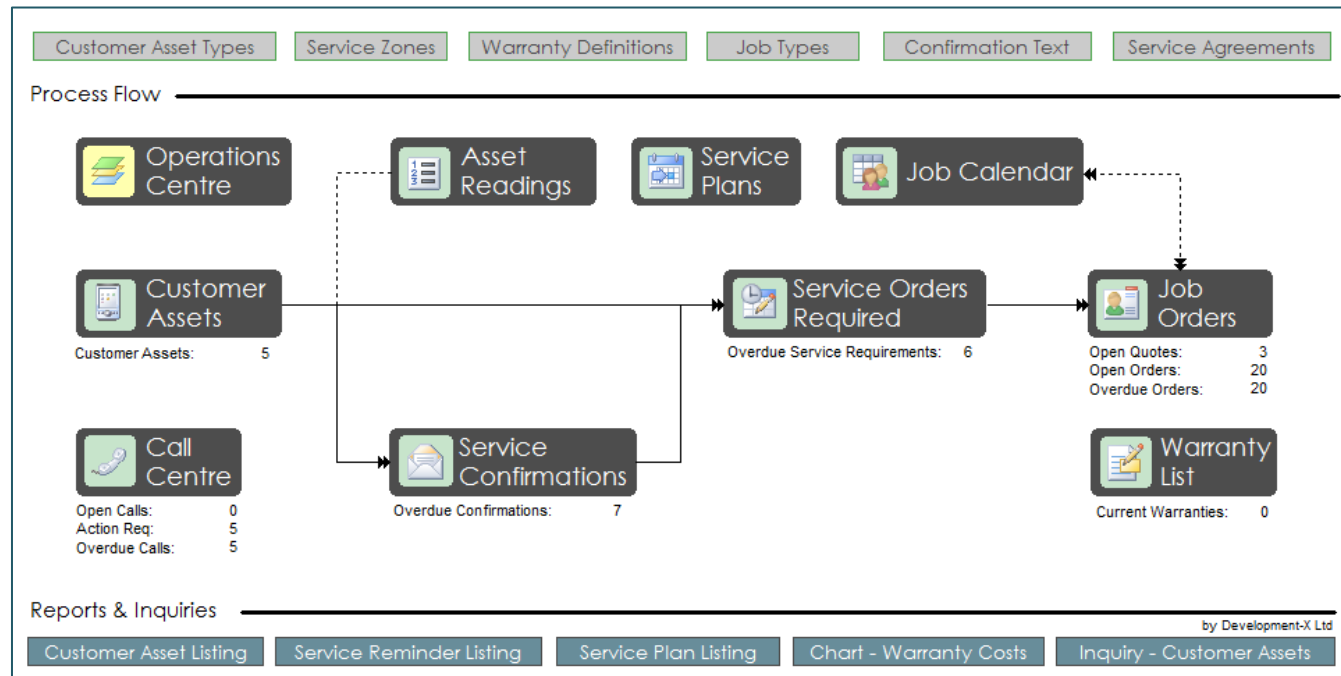
MANUFACTURING MANAGEMENT

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Service Management



Service Orders Required

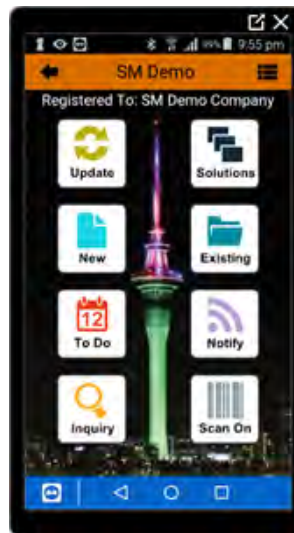
Customers Customer Assets Service Confirmations Customers

Filtering Options

Display service due by: 29/01/2015 Exclude services NotConfirmed that are flagged as requiring confirmation

Select	Service Date	Confirmation Required	Confirmation Status	Asset Name	Asset Number	Customer	Description	Asset Type
☐	10/09/2008	☐	NotConfirmed	AC-8026(CA-134458)	CA-134458	Golden Arch Trading Co.	Air Conditioning Unit - Model 26	Equipment
☐	10/12/2008	☐	NotConfirmed	AC-8026(CA-134458)	CA-134458	Golden Arch Trading Co.	Air Conditioning Unit - Model 26	Equipment
☐	10/01/2010	☐	NotConfirmed	Funkit	FL6325	Golden Arch Trading Co.	Equipment Services	Funkit

☐ Select All Planned ☐ De-Select All Planned Generate Job Orders for Selected Services



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 ✓



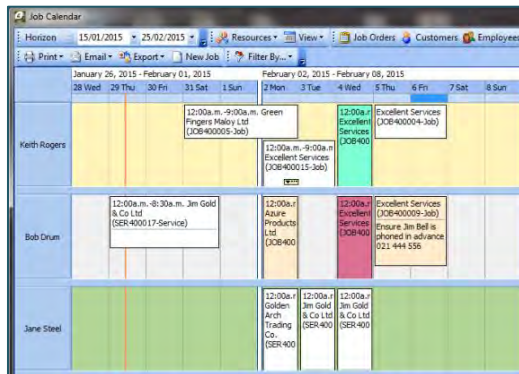
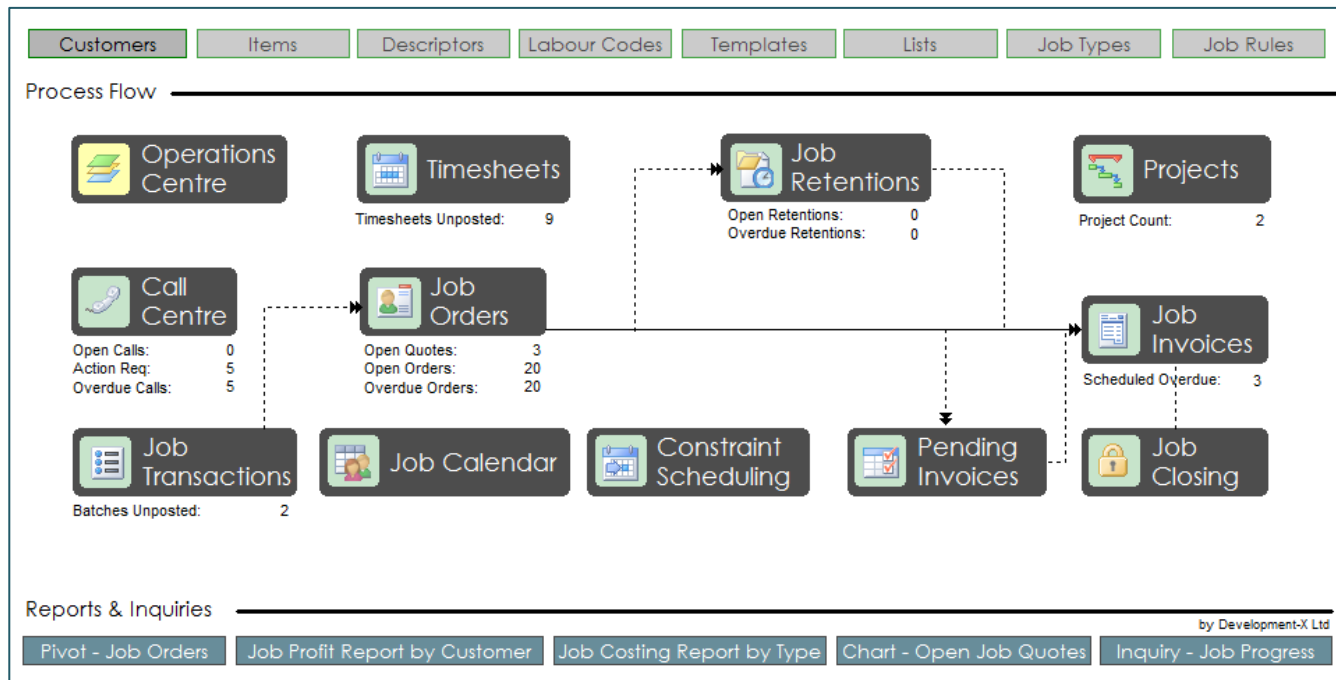
SERVICE MANAGEMENT

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Job Management



Order Number	Status	Order Date	Required	Description	Customer	Tracking	Track Colour	Allocated To	Received From
JOB400007	InProgress	19/02/2014	19/02/2014	Warranty 2	Excellent Services	In Transit	Van 1	Van 1	
JOB400009	InProgress	28/05/2014	28/05/2014	Lift Needs urgent repair	Excellent Services	On Site	Van 1	Van 1	
JOB400010	InProgress	28/05/2014	28/05/2014	Additional Job Requirement	Azure Products Ltd	On Site		Van 1	
JOB400011	InProgress	28/05/2014	28/05/2014	Hoist Repair	Excellent Services	Parts Required	Van 1		

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 ✓



JOB MANAGEMENT

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Accounting



Ostendo comes with standard links to the following accounting packages.



MYOB Premier and Account Right Live versions link with Ostendo.



Xero links directly with Ostendo and provides a robust online solution for lower volumes of transactions.



Reckon was formerly known as Quickbooks and Quicken. Ostendo links with Reckon Accounts.



The Moneyworks data centre provides a multidimensional chart of accounts along with department/cost centre reporting.



Sage Evolution has segmented account code options for department/cost centre reporting. Features include a Business Intelligence Centre and Fixed Asset Module.

ACCOUNTING FEATURES

Overnight bank feeds with Xero & MYOB



Multi entity consolidation with Moneyworks and Sage Evolution



Keep your existing Accounting Solution or Upgrade



ACCOUNTING

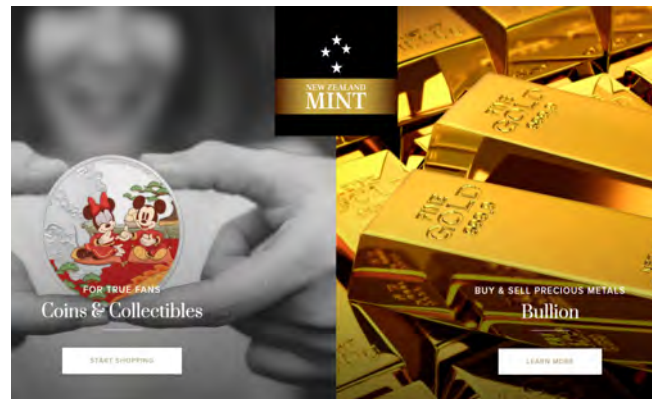
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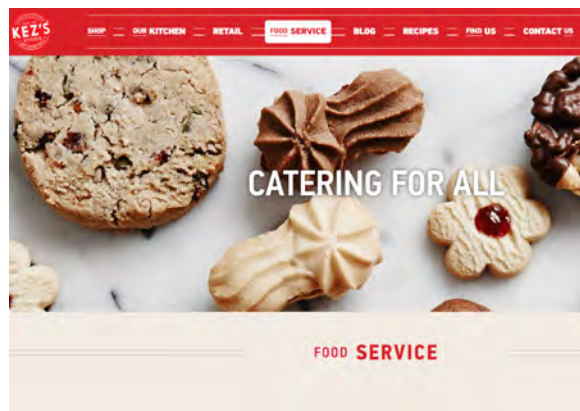
Webshops EDI Links & Customer Portals



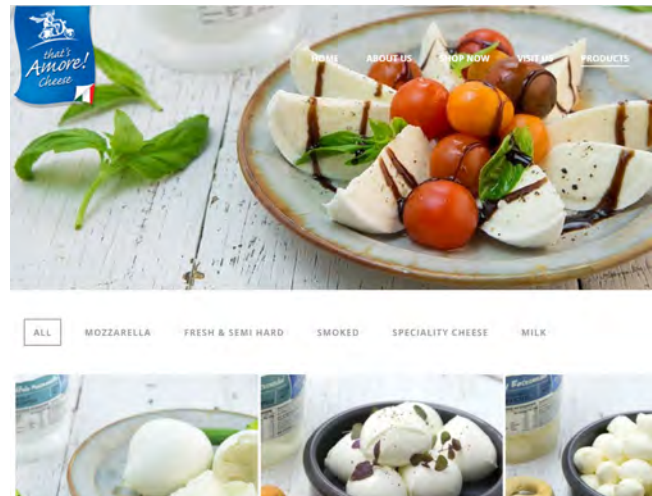
Web Portal : www.bromleywear.co.nz



Webshop EDI : nzmint.com



3PL EDI : www.kezs.com.au



Customer EDI : www.thatamorecheese.com.au

EDI FEATURES	
Sales Orders	✓
Product Data & Pricing	✓
3PL Stock Management & Availability	✓
CRM	✓
WEB SHOP LINKS	
Item description, pricing, available quantity updates from Ostendo	✓
Linked image upload	✓
Webshop sales order download	✓
Credit Card payment download	✓
On account customer order download	✓



WEBSHOPS & CUSTOMER PORTALS

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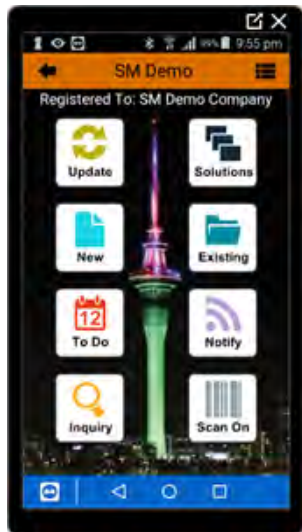
Mobile Solutions



Sales Mobile – Instore Orders



Job Mobile – Remote Maintenance



Freeway – Smartphone Services & Maintenance



Custom Mobile Apps

SALES MOBILE

Sales team – real time availability information ✓

Onsite ordering connected to head office ✓

Product gallery selection for orders ✓

JOB MOBILE

Send jobs to onsite technicians ✓

Review history when onsite ✓

Operates outside of internet/3G/4G range ✓

FREEWAY

Customisable list driven user interface ✓

Time & Material recording on site ✓

Customer signoff on work completion ✓



MOBILE SOLUTIONS

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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

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

WEBSHOPS EDI LINKS & CUSTOMER PORTALS

- ✓ Web Shop & B2B Links
- ✓ 3PL Stock Management & Availability
- ✓ Item (SKU), image, pricing, Stock, upload from Ostendo
- ✓ Sales order, on account / credit card payment download
- ✓ Customisation if required.

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



OSTENDO FEATURES

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