OSTENDO

One system • **Complete** operations

Distribution

Features & Capabilities Paper

Ostendo's distribution capabilities streamline the complete sales cycle from quote through to delivery and invoicing. Whether you're running a warehouse operation with pick, pack, and despatch processes, or handling simple over-the-counter transactions, this guide explores how Ostendo supports wholesalers, distributors, and retailers.

Quoting & Sales Orders

Sales Quoting offers multiple layout presentation options including the ability to incorporate product photos—helping customers visualise their purchases and improving quote acceptance rates. Unlimited quote revisions can be maintained until the quote is converted to an order or marked as lost.

Quotes carry expiry dates with follow-up options before expiration. When converting quotes, warnings highlight any changes in cost or sell prices, or item attributes that might affect margins since the quote was created.

> **Quote to Order Conversion** tracks outcomes with reasons, enabling win/loss ratio analysis. User-defined Tracking Codes and colours provide visual pipeline management for your sales process.

Quote and Order lines support Inventory Items, Kitsets, Supplier Catalogue Items, Non-Inventory Charges, and Custom Configured products. Multiple input methods—Drag & Drop, Batch Select, historical sales lists, or single line entry—suit different order entry scenarios.

Order Processing & Fulfilment

The Sales Order process supports full Pick, Pack, and Despatch workflows for warehouse operations, or simple over-the-counter transactions for retail environments. This flexibility means a single system handles both complex distribution and straightforward sales.

Auto Picking capability streamlines the picking process for all products, with optional logic to pick oldest expiry dates first when handling perishable or date-sensitive inventory. Multi-warehouse and location capability tracks stock down to Aisle, Rack, and Row level.

> **Stock Reservations** allow inventory to be earmarked for specific orders before physical issue. Full stock traceability includes Serial Number, Batch Number, Expiry Date, Revision Number, Colour, Grade, and Size.

Distribution Requirements Planning (DRP) coordinates multi-site processing of orders and stock, optimising inventory placement across your network. Materials Requirements Planning (MRP) determines replenishment needs based on current and future demand.

Pricing & Promotions

Extensive pricing policies support unlimited Price Levels, Discounts, and special pricing with effectivity dates. Multi-currency capability means pricing rules can be specific to different currencies, supporting international trade.

The Order Pricing Matrix allows rules to automatically insert lines under specific circumstances. For example, ordering three widgets might trigger a fourth free or discounted, but only during the month of June. This supports complex promotional campaigns without manual intervention.

> **Add-On Sales** capability helps identify upselling opportunities by showing related products or services when specific items are ordered—accessories when selling equipment, consumables when selling machines, and similar cross-sell suggestions.

Invoicing & Billing

Consolidated invoicing options support billing by Customer or by Order—one invoice covering multiple orders, or one invoice per order depending on customer preferences. A separate 'Bill To' customer enables centralised billing to head offices while shipping to multiple locations.

Recurring Invoices handle regular charges such as rent or subscription services. Single or batch creation, printing, and emailing of Invoices and Statements streamlines accounts receivable processes.

> **Email Integration** allows invoices and statements to be sent to nominated email addresses. Customers and Prospects are defined separately, maintaining clean data for marketing and reporting purposes.

No limits exist on contacts or delivery addresses linked to a customer, accommodating complex customer structures with multiple sites and stakeholders.

Mobile & Delivery Operations

Standard Mobility functions on Android and iOS support the complete distribution workflow: Sales Quote and Order capture, Quick Invoice generation, Picking of Stock, and Capturing Proof of Delivery. Real-time inquiries keep field staff and customers informed.

B2B capability provides a customer portal for auto-creating orders and instant access to their data—outstanding invoices, order status, and account information. This self-service approach reduces administrative overhead while improving customer experience.

Configurable Data Capture supports compliance and delivery documentation including checklists, photos, audio notes, signatures, GPS tracking, typed notes, delivery drop-off information, and status updates.

Mobile capability extends to creating Purchase Orders, Receipting Goods into store, Stock Counts, and creating new customer or prospect records. Scanning capability throughout ensures accurate and efficient data entry.

Reporting & Planning

Extensive Sales and Margin Reporting uses existing reports, inquiries, views, and pivot views—or develop your own using the report writer capability. All results export easily to Excel, Word, and other formats for further analysis.

Any electronic document or image can be linked to a Sales Quote, Order, or individual line. Linked product images can be printed on quotes, helping customers identify products and reducing errors.

Site Costing for inventory allows freight charges and handling costs to be spread across internal transfers between sites or branches. This ensures branch profitability reporting reflects true costs including internal logistics.

Unlimited date/time stamped and categorised History Notes logged against Sales Orders create a complete record of customer interactions. Auto-creation of warranty and asset service records upon item issue captures post-sale obligations. Simple Rentals and Hire capability extends distribution to equipment hire scenarios.

Ready to streamline your distribution operations?

Contact your local Ostendo Consultant to discuss how these capabilities can be configured for your specific business requirements.

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