



# Document Register for Pronto Xi ERP Software

A complete and secure cloud document storage solution for Pronto Xi ERP.

STORE LIBRARIES OF ATTACHMENTS FOR  
ANY DATA RECORD IN PRONTO XI

# The quickest access to supporting documents.

PSA Air's Document Register is a secure document storage solution that connects supporting documentation to any record type within Pronto Xi ERP Software. Simple to use, Pronto Xi users can view, upload and manage attachments of various file types while navigating records within the system. A single ERP record can have multiple attachments providing a full archive of related information with just a single click. Connect supplier invoices, manufacturing drawings, work instructions, images and more.

Document Register is a cloud application designed to work with Pronto Software solutions - ERP, Point-of-Sale (POS), CMMS or it can be used with any software that has basic API availability.

## More information everywhere you need it.

Document Register can be used to store countless details against any system record. With limitless uses, just imagine the benefits of simplified access to underlying information right where you need it.



Upload quotations with purchase requisitions.



Include photographs with safety incidents.



Include audit packs for payment runs.



Store images of equipment breakdowns with workorders.



Create document audit trails for improved traceability (e.g. POs).



Photograph issues for work requests.



Track supporting documentation for returns, credits and RMAs.



Store manufacturing drawings, specs and photos with manufactured items.



Attach contracts to records for quick reference.



Include specification sheets and safety data sheets with inventory item records.



Tie reconciliations to accounts or integrities.



Upload supporting documentation for GL journal entries.

# A no nonsense user interface.

Document Register is designed for users to immediately take advantage of functionality. A single click on the DocReg mode button from the related Pronto Xi record opens the Document Register interface. All existing attachments are highly visible and upload and other document management features are clearly located for users to take action.

**PRONTO XI**

Purchase Orders

Maintain Purchase Orders

PO M006

Find Dates Cancel Header Lines Goods Receipt In Transit Update Approve Status PO Enquiry Entry Extra Supplier Summary View PO View Invoice **DocReg PO**

Standard 6 rows

Order ...	Ba...	Order Type	Supplier	Whse	Ordered	Action	Arrival	User Name	Status	Status	Cu...	Order Total
1051	AA	Goods Return	X0001USD	HM01	09-JUN-2021	09-JUN-2021	09-JUN-2021	psdjls	90	Completed Return		-250.00
<b>1052</b>		<b>Normal Order</b>	<b>X0001USD</b>	<b>HM01</b>	<b>09-JUN-2021</b>	<b>09-JUN-2021</b>	<b>09-JUN-2021</b>	<b>psdjls</b>	<b>70</b>	<b>Updated:224</b>		<b>500.00</b>
1053		Normal Order	X0001USD	HM01	09-JUN-2021	09-JUN-2021	09-JUN-2021	psdjls	40	On Order		500.00
1054		Normal Order	X0001USD									
1055		Normal Order	X0001USD									
1056		Normal Order	X0001USD									

**Document Register** Home Settings Logout

/PO/1052

Search files... < Back Upload New File New Folder

1052.pdf CAT978.pdf

## Keeping your files secure.

Document Register ensures that only authorized users have access to files. Utilizing a secure token that is passed to the cloud platform, Document Register verifies the user's credentials based on the ERP software's security settings. Once verified, the user is provided access to transmit, edit and more.

# Taking Document Register to the next level.

There's a lot more that Document Register can do beyond simple document storage. Adding innovation and logic can provide even more value through increased efficiencies.

## Automatically post system generated documents.

Post Pronto Xi ERP and TrueForm Neo generated documentation automatically to the Document Register using built-in logic and processes. As documents such as purchase orders, remittances, sales orders, and invoices are printed, the system can pass them to Document Register ensuring all items are captured within the record's storage location.

## Easy upload of smartphone images.

Use Document Register with a smartphone to directly attach images to ERP software records. For example, signed delivery document images, outgoing shipment photos, fault/repair images can all be snapped on location and attached directly to specific ERP records in Document Register from the mobile device.

## Automated report generation.

Document Register can consume data coming from Pronto Xi and generate automated reports, such as an approval report for a PO or Invoice, or a 3 way match report for invoices against POs. As critical files are sent to Document Register, the ability to create reports on the fly provide users with efficient and consolidated information from the ERP.

## High visibility approvals with PSA Payment Pack.

PSAs Payment Pack add-on for Document Register provides executives and finance staff with ultimate visibility when approving vendor payments. This complete payment approval pack groups all documentation related to the payment, such as POs, invoice, 3 way match reports, invoice approval audits and remittance advices. Approvers can quickly access the supporting documents prior to approving the payment. Level up - take photos of goods arriving on site, and include them in the payment pack for the approver to review!

## Get the Document Register

Document Register can efficiently provide visibility and organization to your corporate record keeping.

Contact your Pronto Solutions Alliance representative for more details.

Pronto Solutions Alliance Inc. (PSA) helps business clients reach and exceed their potential through implementation of Enterprise Resource Planning software. We are the leading North American reseller of Pronto Xi ERP Business Software.



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