PRONTO XI

Applications Overview

Asset & Facility Management

Simplified services

Trademarks

Disclaimer

This document contains statements related to our current and future developments that may constitute forward-looking statements. They are subject to changes and may be available in a Pronto Xi 770 service pack or future release of Pronto Xi.

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Asset & Facility Management
Contents

Simplified services

Focus your people, processes and assets **on a single goal** – achieving business excellence

With Pronto Xi's Service, Mobile Service and Service Connect modules, you can handle the full end-to-end life cycle of service calls.

Enable your customers to raise service calls by using Service Connect. Through this user-friendly web portal, your customers can track the status of their service call and review the accompanying conversations in real time, giving them the ability to obtain information on demand.

Minimise your customers' waiting times by keeping track of high-priority service issues, customer service history, warranties and time-critical customer service-level agreements (SLAs) with Service. By allowing your back office to manage service calls – from contracts to call allocation and invoicing to reporting – in a central location, Service enables you to focus on providing exceptional care for your clients.

When your service engineers are on the field, Mobile Service equips them with the functionality they need to complete predictive or reactive work. They can also invoice customers and complete payment transactions on the site.

Resource Management enables you to plan your human and non-human resources. It provides a thorough work roster and employee award system that allows you to optimise your resource utilisation. Complete the end-to-end process with the allocation of appropriate awards and allowances, with information flowing smoothly into Payroll.

Schedule your resources, teams and equipment with Resource Scheduler. An intuitive web application, it offers an effective visual overview of your resource allocation and enables quick rescheduling in response to ever changing daily operational needs.

From quotation through to completion, Project makes it easy to conduct granular tracking of a project at task level. Cost breakdowns and direct integration with Pronto Xi's Resource Management module also enable your projects to stay within allocated budget.

Maximise your planning and control of plant maintenance activities with Maintenance Management. By ensuring your equipment is always in top shape, Maintenance Management helps you to reduce breakdowns and service costs.

Rental lets you keep track of rental products in a fully integrated system, including current rental status, traceable contracts, service and rental history, and asset depreciation.

Project

Smart money

Project automates the time-consuming aspects of project quotation, giving you **greater control** over costing procedures

By integrating with other Pronto Xi modules, you will be kept up to date with work orders, sales orders and service calls, minimising unforeseen costs.

Key functionalities include:

- Multiple cost centres and budgets per project
- Full Cost Breakdown Structure (CBS) for greater cost granularity
- Project Tasks and milestones deliver more control over project activities and deliverables
- Project Tasks fully integrate with Resource Management to enable visualisation and scheduling
- Flexible progressive invoicing or via Claim Schedule
- Create Project parent/child hierarchies up to 20 levels deep
- Customisable profit take-up and release rules
- Create timesheets flexibly via Projects or Resource Management and seamlessly update Payroll through integration

Intelligence

Keep your projects on track using Business Dashboard for Project. Quickly identify how projects are performing and how they are likely to track over the medium and long term. Key performance metrics are included to help you gain this visibility at a glance:

- Project profit, income and costs per year
- Unpaid claims
- Claims to be submitted
- Claims to be certified
- In progress cost to complete by branch
- In progress project count
- Total contract amount by project type

Project workflow

When creating a quotation or responding to a tender, you can define a hierarchical Cost Breakdown Structure (CBS) for all related labour and materials. Simply apply margins to each element to formulate a detailed Claim Schedule, which can be used as the basis for billing. Project Tasks can then be set up to define the activities, resources and commitments required to carry out the project phases.

Once the project is in progress, you can track costs incurred and income earned. With full integration with Pronto Xi modules such as Accounts Payable and Purchasing, Project allows you to record the project and cost category against any purchase order or supplier invoice.

Purchase orders for required materials can be raised directly from the project budgets and applied to each relevant Project Task, ensuring that all commitments are managed in conjunction with the project activity or deliverable. Purchase orders can be consolidated to help save on shipping costs, and materials can be held in a dedicated warehouse until due on site.

Where items will be built specifically to be used by the project, Project can create manufacturing work orders based on a standard bill of material (BOM) or allow for customised configurations using the Sales Configurator tool.

Project is integrated with Pronto Xi's Payroll, Resource Management, Resource Scheduler and the Fixed Asset modules, allowing you to record labour expenses and equipment hire through timesheet entry. Where applicable, Project automates Payroll postings on costs to the project, ensuring that the true cost of a resource is accounted for.

Throughout the life of the project you can examine costs and income for each cost category or against the master item details referenced by the project. This means you can easily compare the information to your original budgets.

Project tightly controls variations to the original quotation. You can enter provisional variations, submit these to the customer, record them as rejected or approved, and modify the budgets accordingly.

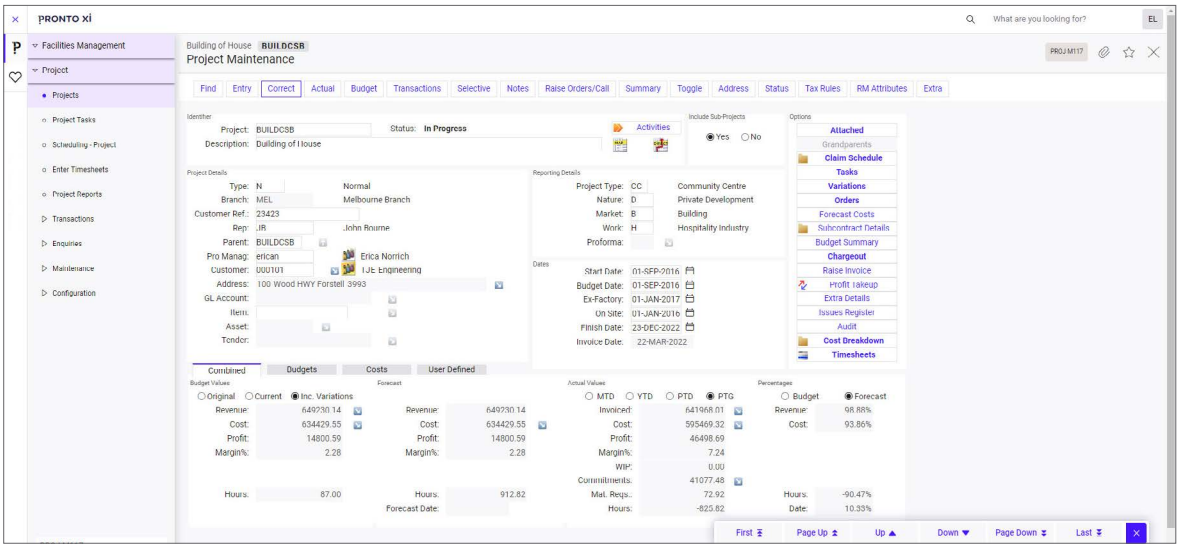
The Master Claim Schedule can also reflect these costs and income against the original item list or any items defined for the variations of the project

Project types

A "project" can be any work undertaken by your company over any period of time. It is either performed for a customer defined in Accounts Receivable, or is posted to a General Ledger or Fixed Asset account.

Project allows for a number of types of projects, including:

- contract
- time and materials
- asset creation
- enhancement
- General Ledger cost
- cost tracking
- warranty
- rework
- manufactured (requires Shopfloor Manufacturing)
- maintenance management (requires Maintenance Management)
- service (requires Service Management)
- Service (requires Service Management)



Find all project details in one central area

Project life cycles

A project goes through a number of stages between its creation and its completion, with each stage represented by a different status.

Raise a Quotation

Quotations can be generated based on estimated costs. The details of the customer and nature of the project are also recorded.

Modify Quotation

Quotations can be easily modified at the negotiation or re-evaluation stage. If costs are incurred before the final sign-off of the budget, these are recorded before the project is moved to In Progress.

Accept/Reject Quotation

Once the quotation is raised, it must be either accepted or rejected. An accepted quotation becomes a project in progress, while a rejected quotation is archived as a lost quotation.

Setup

During the setup stage, initial project details can be captured. Some costs can be recorded against the project, and original cost estimates can be revised.

In progress

Once a project is in progress, costs incurred can be recorded against the project, invoices generated, variations processed and profit taken up.

Close the project

When a project is completed, the close-out operation calculates its final profit/loss (profit can be taken up to a nominated account in the General Ledger) and its status is changed to 'finished'.

The close-out operation is not reversible, although sub-projects can be attached to a closed parent project.

Close-out rules

Close-out rules and posting rules can be set according to different types of projects and locations, providing flexibility for companies that need it.

For example, you can require contract projects to be fully invoiced to the contract value before close-out. However, you may prefer the invoiced value for time-and-materials projects to be determined by their costs.

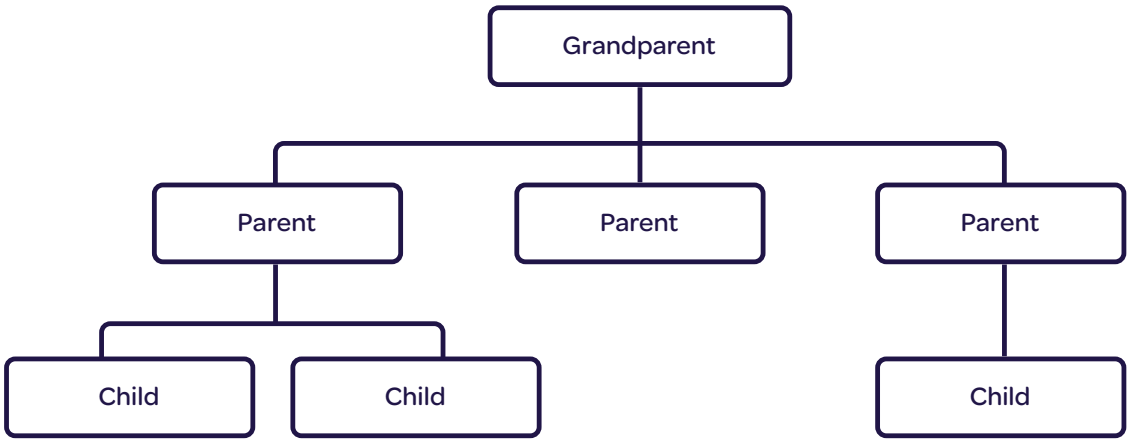
Up to 11 close-out rules can be applied to projects, including:

- prevent closing if the project is not fully invoiced according to contract value
- prevent closing if purchase orders are not both received and invoiced
- prevent closing if work in progress is not cleared
- prevent closing until all variations are approved
- run a system integrity check upon closing
- use a defined method of profit take-up at closure, or define that no profit take-up is used at all

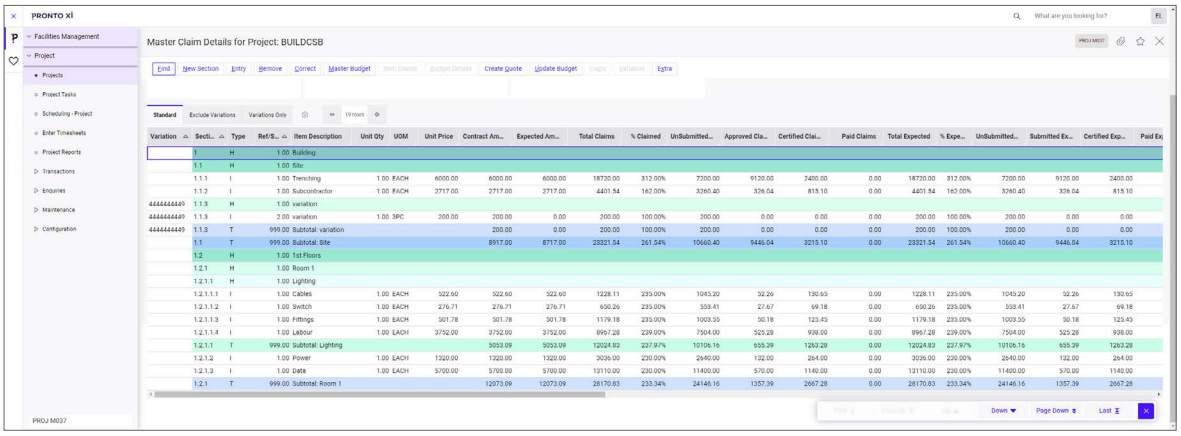
Relationships between projects

You can use Project to build a hierarchy of projects for enquiry, reporting and invoicing purposes. Up to four hierarchy levels are available, with up to 20 levels of child projects available under the grandparent/parent hierarchy. The levels are:

- Grandparent – these are the highest-level projects, available only for enquiry purposes. Pronto Xi rolls up the budgets and actuals of the lower-level projects attached.
- Parent – these projects can have sub-projects attached, with the budgets and actuals rolled up to the parent project for enquiry and reporting. If customer invoicing is done at this level, costs from the parent and sub-projects are aggregated, mark-up is applied and the parent project is billed.
- Child – these are sub-projects that are attached to a parent project, but have their own budgets and scheduling. Costs may be posted directly to sub-projects, with invoicing done at the parent or child level.
- Adult – these are projects established independently, with no relationship to other projects



Set a hierarchy of projects



Review granular cost details with the Cost Breakdown Structure

Cost management

Project enables you to maintain accurate and timely cost control of projects, with the Cost Breakdown Structure (CBS) allowing for a greater level of costing granularity, cost allocation and margin management.

The CBS provides a sequential framework of activities and their related costs, meaning you can itemise and prioritise works within a cost category to assist in the scoping, quoting and tendering of major or minor projects.

Multiple CBS levels can be linked to a Project Task to align material commitments and resource requirements with activity time frames. By breaking down costs within a hierarchy structure of this type, you gain greater control when applying mark-ups, factoring variations or managing analysis of project budget versus actual costs.

To further streamline the quoting process, Pronto Xi includes a Copy to Claim Schedule option, so that detailed cost structures can be passed directly to the Claim Schedule area. This ensures greater consistency across the project and delivers the foundation elements for quoting and invoicing.

Other benefits include:

- consolidation of multiple CBS structures when tendering for multi-site opportunities
- user-defined CBS row colours to improve visualisation and differentation of segments
- ability to upload CBS structures from Excel
- automation of actual cost disbursement across CBS elements
- ability to copy CBS structures from other projects
- visibility of percentage completion for linked tasks
- ability to identify and minimise potential cost overruns while the project is in progress
- capacity to generate more accurate quotations, cost tracking and service warranties

Cost categories

You can choose to group certain types of costs within a project into cost categories. Each category can then have separate budgets and cost totals assigned to it to assist with budgeting and analysis.

Costs

There are a number of ways you can incur direct costs against a project:

- sub-contracting
- purchasing
- supplying inventory to the project
- posting a supplier's invoice
- posting direct journals
- using timesheets.

Inventory can be issued to a project via a direct inventory issue, a sales order, a purchase order or a supplier invoice.

Timesheet entries record costs for both labour and equipment hire, including overhead cost generation.

Journal entries – using the journal functions in Financials – can be used to record indirect costs against projects.

Variations

Project allows you to make and manage variations to the original project.

Monthly summary

Project stores data in monthly buckets each time a transaction is processed against a project. This dramatically increases the efficiency of enquiry functions.

Tasks

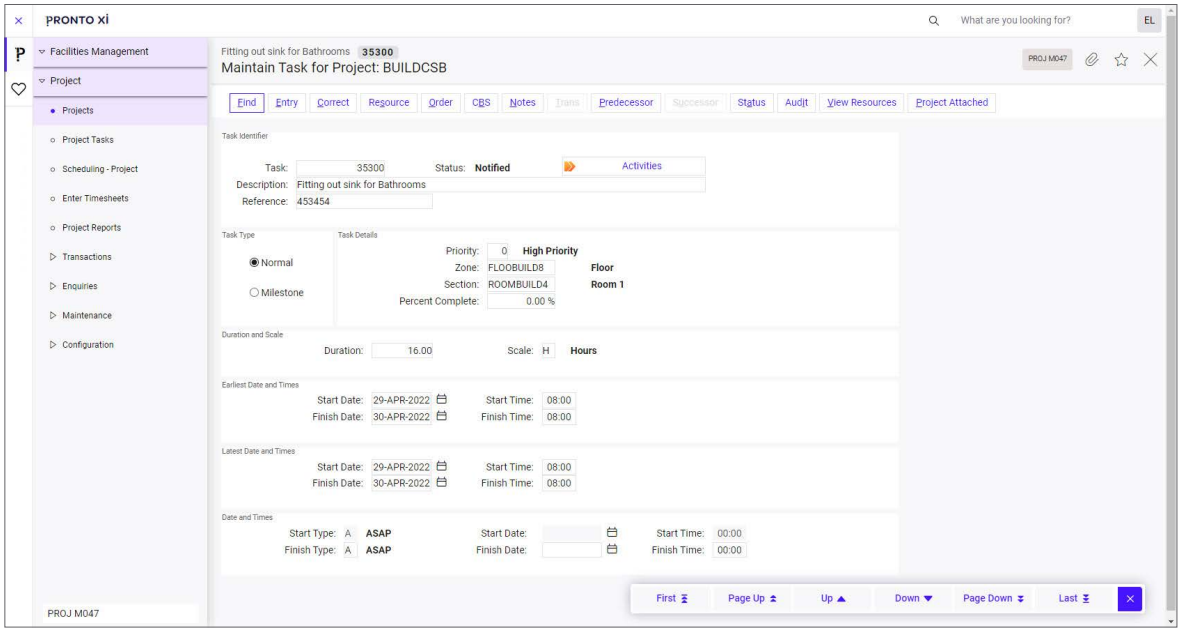
Project Xi's Project Tasks functionality improves your ability to manage projects by activity and duration. By attributing a task to a specified element within the project CBS, Project brings together budgeted cost estimates and the activity details necessary to get the job done on time and to budget.

Project Tasks allows you to view the percentage completion and status of each individual task, helping to deliver greater insight into the progress of a project. Under the Project Task structure, you can plan and organise deliverables in line with critical milestones, ensuring that preliminary tasks are completed before subsequent tasks begin.

Attach purchase orders, material requisitions, resources and CBS elements to tasks, allowing better tracking and commitment reconciliation at the activity level.

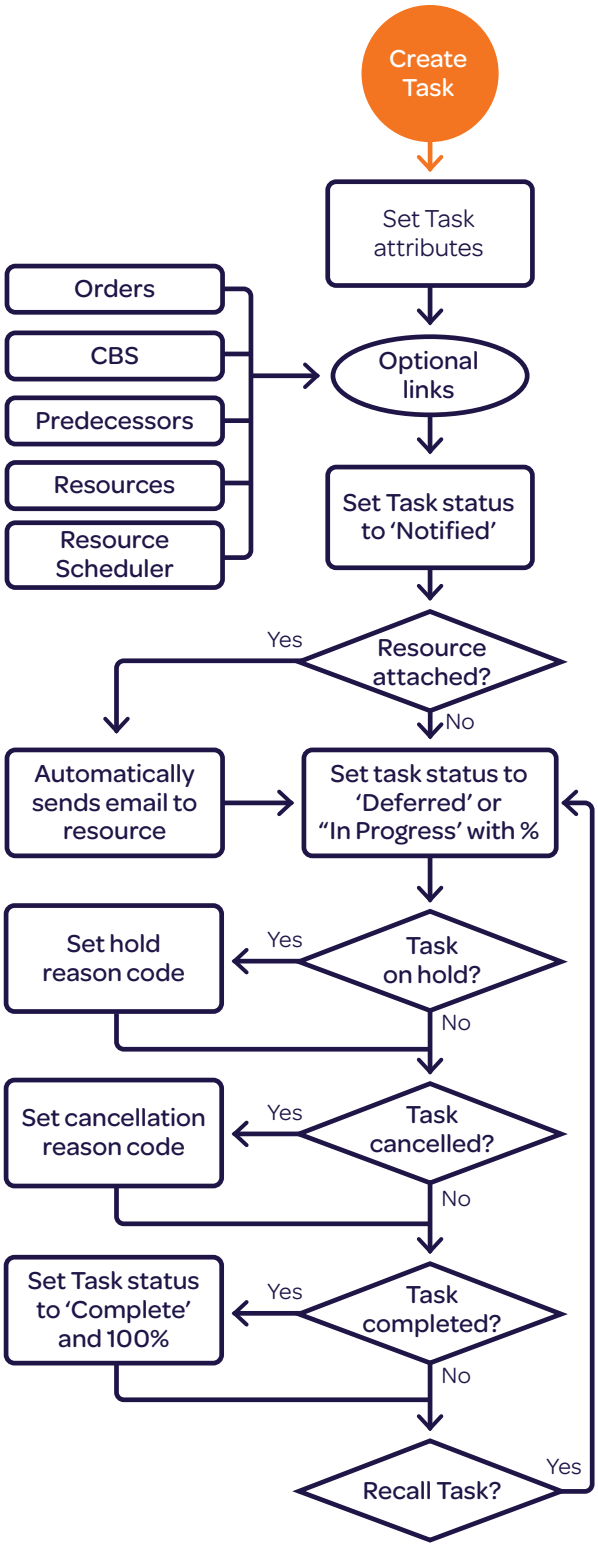
Importantly, Project Tasks delivers the framework you need to efficiently allocate resources – whether personnel/employees, plant equipment or contractors – to tasks. Through Resource Management, you can also use generic resources, resource your teams, and accept and decline workflows.

Project Tasks also manages communications with your resources. As time frames change and milestones are impacted, it can deliver instant notifications to keep all your allocated resources fully informed.



View details of a Project Task

Project Tasks can be seen on the Resource Scheduler. You can email key task details to allocated staff in advance of the scheduled work, and can also attach calendar appointments that include the task details.



Visualise and reschedule planned tasks, then import your final plan back to Project

Other key features of Project Tasks include:

- intuitive and logical task workflow
- Resource Scheduler for graphical visualisation and task rescheduling
- a rescheduling tool that automatically reschedules task time frames and resources where capacity clashes are identified
- the ability to copy a task profile from an existing project
- the ability to link tasks to create dependencies so that a task may not commence until the preceding task is complete

Scheduled project claims

The Project Claim Schedule creates invoices for customer billing. It can be used to develop the project budget.

Customer claim entry

Once the project moves to the status of In Progress, work begins and you can raise claims to receive funds from the customer.

There are three claiming methods facilitated by the Claim Control function:

- Invoice method – a direct invoicing method that does not take into account any certification or progress claims.
- Progress invoices – these are based on cost for time and materials, defined project stage completion, or percentage completion.
- Progress claim – this method creates a sales order invoice, but holds the order back from invoicing and tax presentation until the claim is certified

Claim retention percentages

You can define retention percentages for the overall project and for each claim, helping to ensure the customer does not attempt to retain more than the agreed values.

Claim entry

Claims can be entered either manually or in bulk via an amount or percentage. These values can be defined against each master item or against any of the sub-total or grand total lines of the claim, which will then be applied pro rata across the appropriate sections of the claim.

Claim life cycle

A typical claim life cycle progresses through a number of stages, represented by the following statuses: Entered, Internal Approval, On Hold, Submitted, Certified and Paid.

Actions

Actions record the various events for a claim, including status changes and other manual events that can be entered to add value to the claim process.

To assist you when you are reviewing a project, each action can have a set of notes to capture details such as phone calls, letters and faxes.

Certification

A submitted claim is sent to the customer for their review and approval prior to them returning a payment advice. This document states the claimed, assessed and retention amounts defined by the customer, as well as any prepayment drawdown amounts.

These details are entered against the claim via the certification process, where any differences are recorded against the claim details.

Various methods are available for certifying claim amounts.

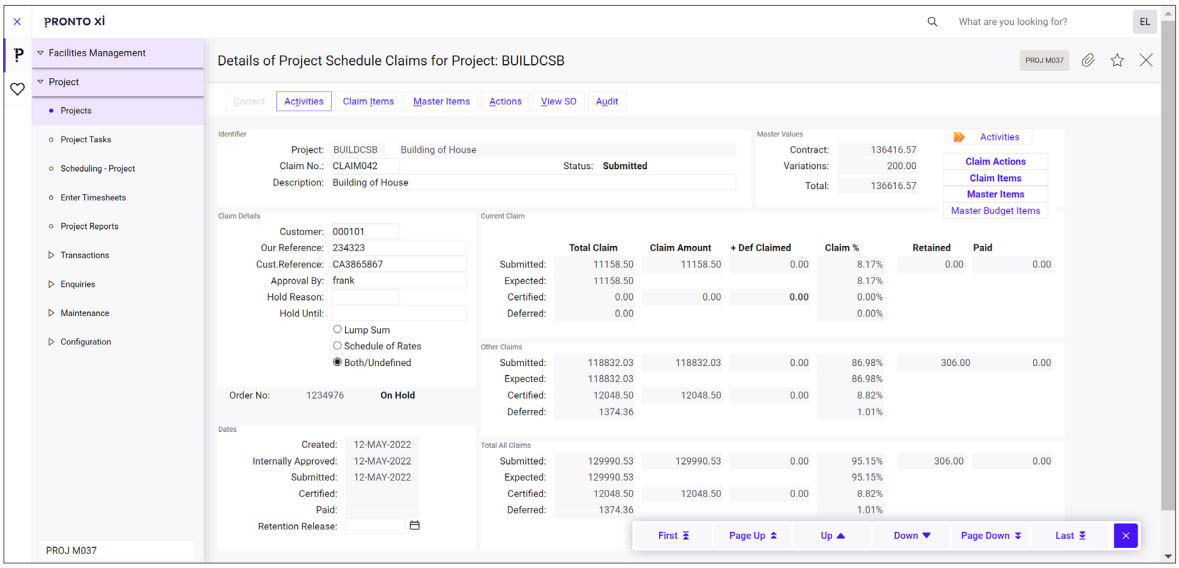
The defer method records the difference as a separate amount on each claim item. This can then be discussed with the customer and possibly offset in the future.

Customer retention release

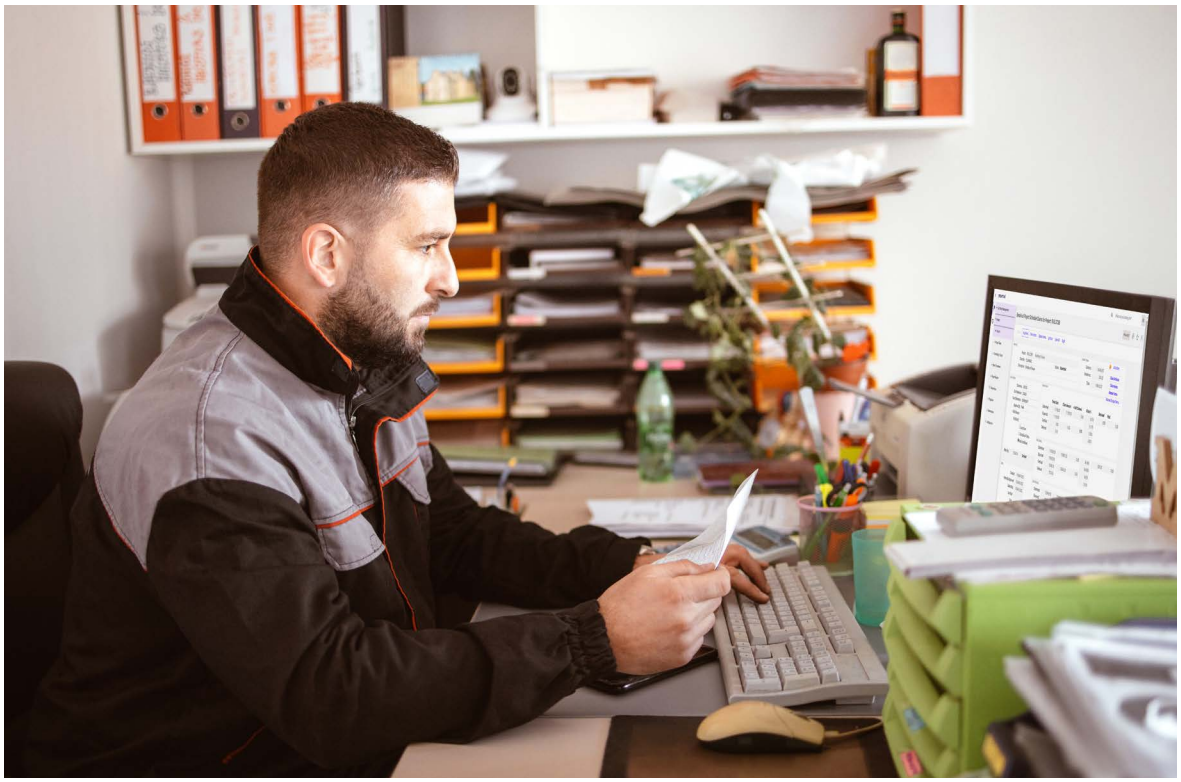
If the customer has retained any funds during the claim process, they can be requested for release via a retention release order. This can occur at any time during the project but typically happens near its finalisation.

Claims enquiries

The Claims Enquiry screen makes it easy to find claims by offering a variety of powerful search parameters, including dates, statuses, types of claims, and claims that have variations.



Create and submit project claims



Income

In addition to capturing incurred costs, Project also records income earned. Income is recognised by posting an invoice in Accounts Receivable, manually raising a sales order, or generating a progress invoice or claim.

Invoice income category

Income transactions are posted to the project as a "credit" in an income category. You can have multiple income categories on a project.

Progress invoices

Project calculates invoices for time-and-materials projects using costs recorded against the project.

Invoices can be generated in stages using an invoice schedule based on either a fixed amount or a percentage complete.

Progress claim

This method creates a sales order invoice but holds the order back from invoicing and tax presentation until the claim is certified.

Profit

Progressive profit take-up is often used on long-term projects. Project uses a "percentage of completion" method to determine the amount of profit to take. If no profit is taken up during the life of the project, 100% of the profit will be taken up when the project is closed.

Profit take-up methods

To suit different types of projects, there are four methods that can be used for taking up profit:

- Cost-based method – this assumes that the true completion status of a project is best measured using the actual costs as a percentage of the forecast cost.
- Sales-based method – this assumes that the true completion status of a project is the amount invoiced against the contract value.
- Actual-based method – this assumes a project is 100% complete and therefore takes up all actual values.
- Cost/sales-based method – this uses the cost- based method to calculate the percentage complete, but does not allow you to take up more revenue than you have invoiced

Posting rules

Project allows you to set up different posting rules to General Ledger based on user-definable fields and project types. This allows you to ensure postings end up on the correct balance sheet or profit-and-loss statement according to your company's general ledger requirements.

Project management tools

Contacts and Functions

The Contacts and Functions feature records the names and details of people associated with the project on both your team and your customers' team, helping to facilitate communication.

Issue Register

The Issue Register lists administrative events and activities that need to take place during a project.

You can assign responsibility for events and activities to specific individuals. The My Issues function allows the individuals to review their allocated issues and actions across multiple projects; any issues or actions that are approaching their due date can be shown in calendar view.

Sub-contracting

Project Sub-Contractor is a sub-module that provides a series of functions and controls to initiate and manage outsourced project tasks.

Supplier agreements

Sub-contractor or supplier agreements create a commitment that can be broken down across multiple cost categories.

You can capture details of the tasks performed by sub-contractors as:

- scheduled rates or lump-sum payments
- retention percentages
- currency codes
- estimated start and end dates.

Sub-contractor claims

Claims for work performed by sub-contractors can be entered using either a summary or detail method. They are assessed based on the terms and conditions of the original sub-contractor agreement.

Entries include claimed and assessed amounts, reasons for any differences, retention amounts, tax amounts and percentage of labour. Project Sub-Contractor automatically calculates the default retention amount, along with the tax component of the assessed amount.

Once all amounts are accepted, you can raise a claim or invoice showing the claim number, amount, currency rate, date and pay-by date.

Variations

During the life of a sub-contractor agreement, either you or the sub-contractor may request changes to the terms or scope of work. Project Sub-Contractor facilitates multiple variations that can be made to agreements during the claim entry process.

Sub-contractor retention release

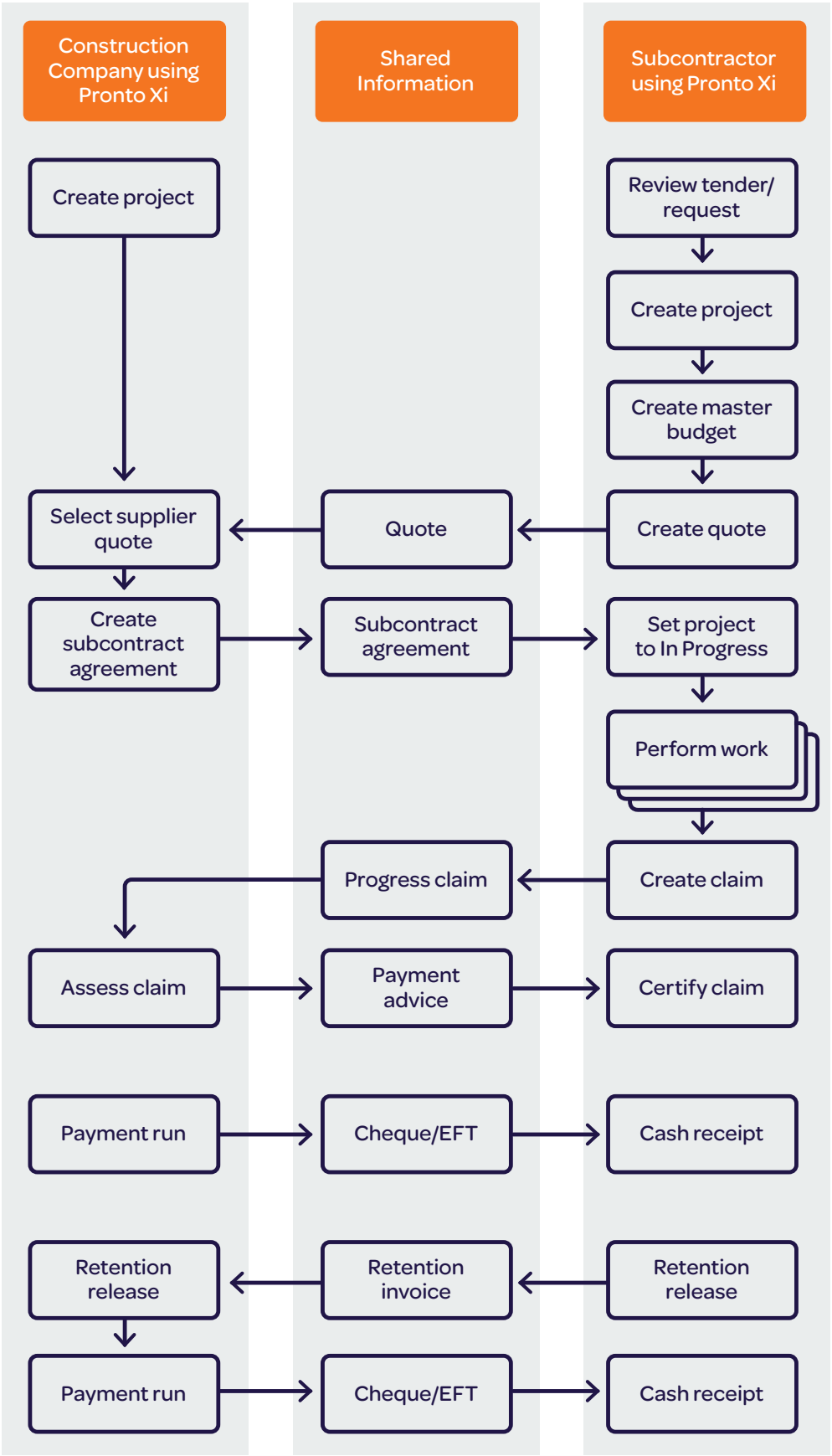
You can release held retentions at any point in the life cycle of a sub-contractor agreement. Any retained funds are held in a separate General Ledger account; when they are ready for release, Pronto Xi will automatically create a taxable payment for the sub-contractor.

Enquiry on sub-contractor agreements

A single project manager may be responsible for a large number of sub-contractors and projects, making it important to have a powerful enquiry tool. With Project Sub-Contractor, sub-contractor data can be filtered according to a wide range of criteria.

Agreements can also be filtered by type (such as lump sum, scheduled rates or supply), status, variation types or claim types. These criteria can then be used to select matching sub-contractors.

The enquiry tool also allows users to drill down into the detail of the record based on the criteria entered.



Sub-contractor claims workflow

Security

Budget limits

Project Manager Limits enable you to set the amount (in budget or contract value) that a manager controls at different stages of an individual project. If desired, you can also set an in-progress limit but not a completion limit.

Branch masking

Users can be restricted to specific projects based on branch masking rules. This ensures that branch data remains secure.

Credit limits

Project can notify you if a project budget takes a customer over their credit limit. You have the option to receive a warning message but allow the project to continue, or you can leave the project at the quotation stage until approval to proceed is received from a credit officer.

Timesheets

Time recording and timesheet entry

Project has a user-friendly time-recording function that allows organisations to record, track and authorise timesheets for work performed in Pronto Xi's Project and Service modules. Timesheet entry allows you to record and report labour costs, hours and overheads against a project or service call.

With the Timesheet Control table, you can customise timesheet entry for your business's needs. Some of the customisation options include:

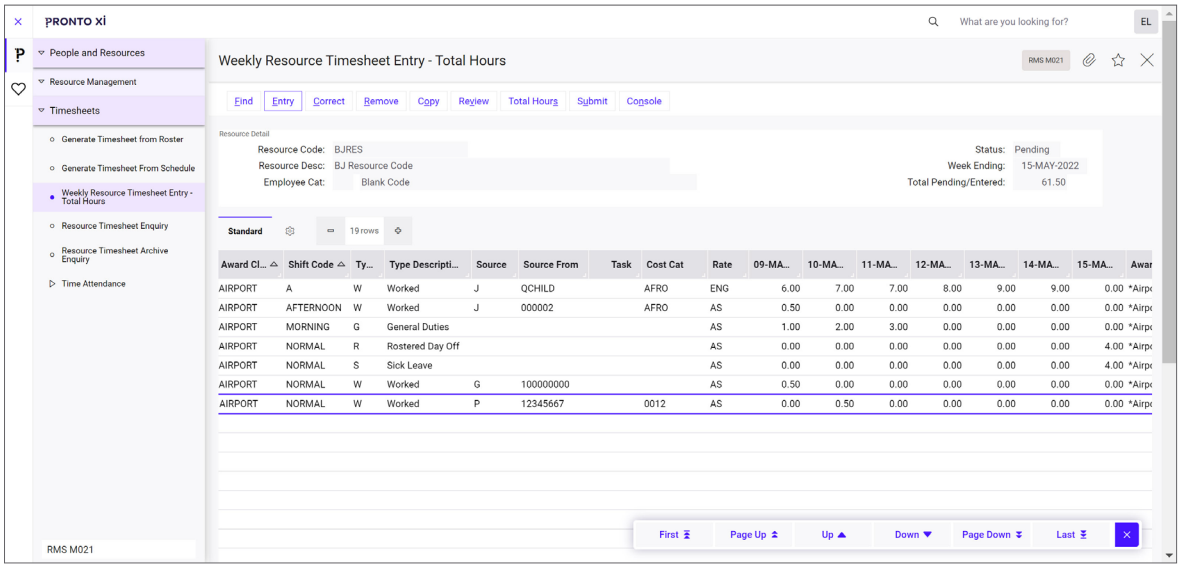
- a variety of methods for calculating cost rates
- a variety of methods for calculating charge-out rates
- the option to integrate timesheets with Payroll, either via Projects or using the Resource Management module (if turned on)
- choice of detail required for timesheet entry
- the ability to post additional on-costs (for example, superannuation or personal/carer's leave)
- timesheet approval options

You can add timesheet security requirements at different levels, such as authorising specified users to run reports or to maintain and set up timesheet control records.

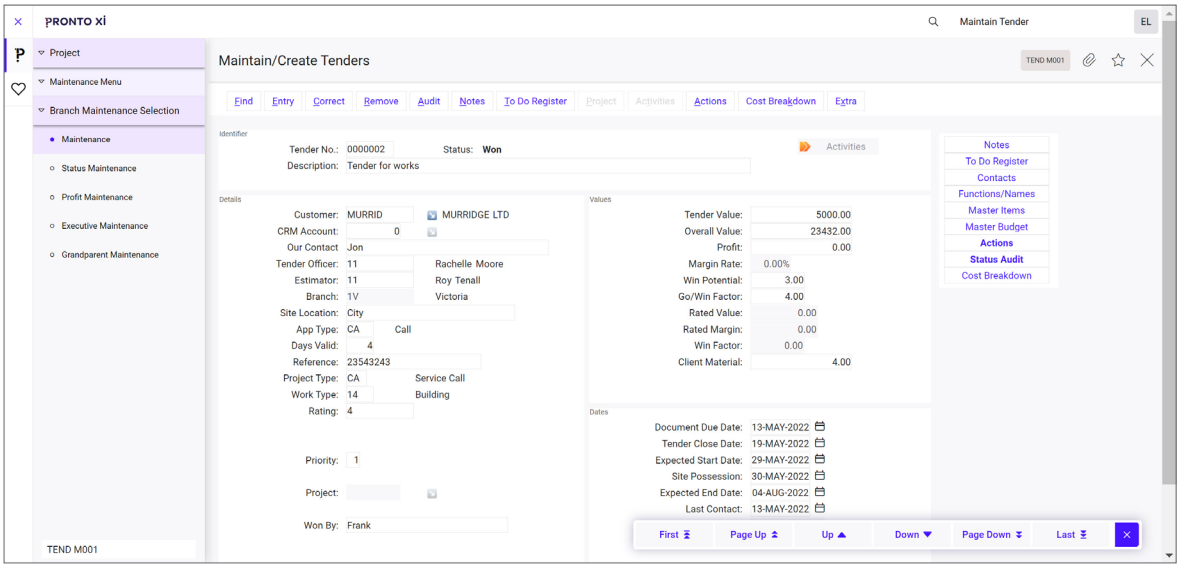
You can also set rates for overhead recovery against labour costs, and these can be automatically posted.

Equipment cost and charge-out rates

An equipment resource may be assigned default cost and charge-out rates for different periods (for example, per day or week). When you enter timesheet transactions against the equipment resource, the default cost and charge-out rates are easily posted to the project or service call.



Create a timesheet entry in Resource Management



Manage all the activities in the tender process

Tenders

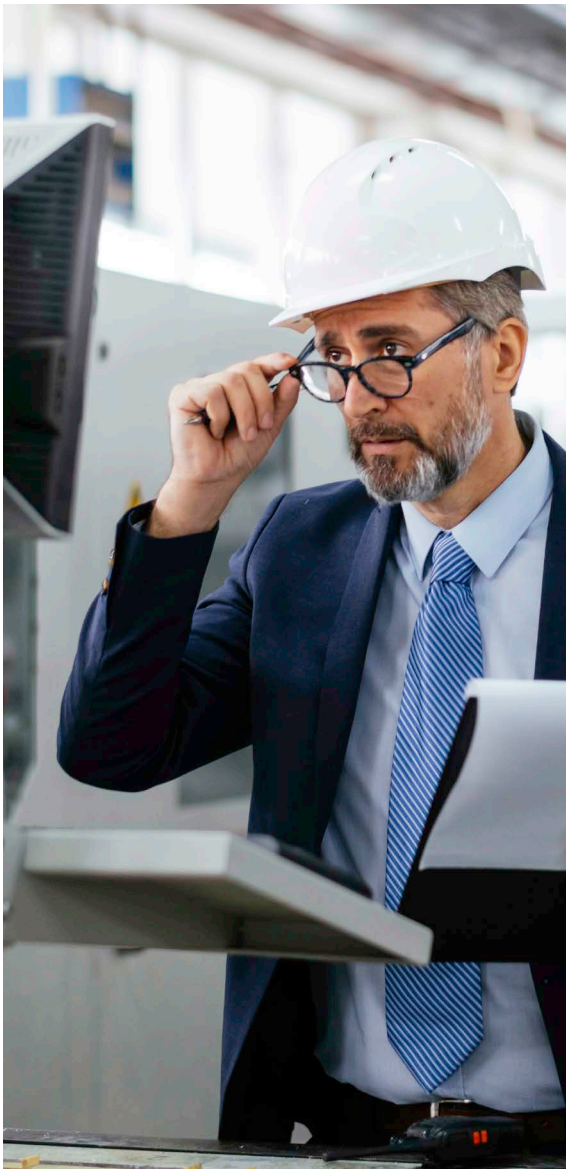
Tender Management manages future prospects, tenders and their associated contracts.

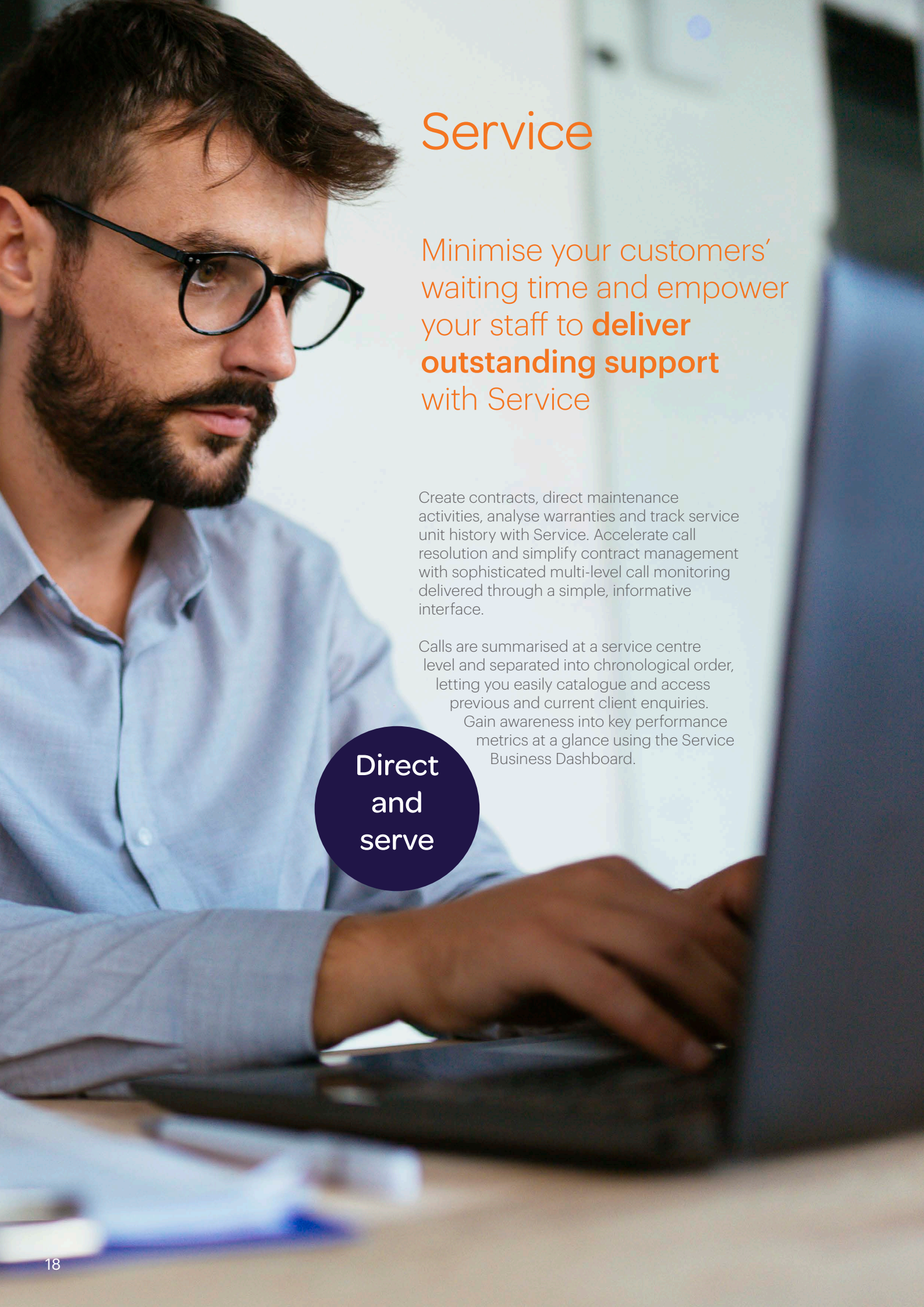
With Tender Management, you have the ability to forecast probable contract values and margins on tenders, current jobs and service contracts.

Once the tender has been won, the data flows seamlessly into the linked project.

The following functionality is available in Tender Management:

- go/win factor
- the ability to build a detailed CBS to capture tender-related costs
- history of changes to tender
- notes associated with tender or prospect
- a to-do register that itemises responsibilities and timeframes
- forecasting and phasing of sales and margins
- tender and prospect reports





Service

Minimise your customers' waiting time and empower your staff to **deliver outstanding support** with Service

Create contracts, direct maintenance activities, analyse warranties and track service unit history with Service. Accelerate call resolution and simplify contract management with sophisticated multi-level call monitoring delivered through a simple, informative interface.

Calls are summarised at a service centre level and separated into chronological order, letting you easily catalogue and access previous and current client enquiries. Gain awareness into key performance metrics at a glance using the Service Business Dashboard.

Direct and serve

Integration

Service is fully integrated with all Pronto Xi applications, removing unnecessary re-keying of data. It simplifies the management of service contracts, and efficiently logs and processes service calls.

The Service to Project link provides integration with Project. It directly links a service contract to a project, allowing you to track costs and income, set budgets and measure contract profitability. It also provides service call profitability analysis.

Intelligence

The Service Business Dashboard provides an at-a-glance insight into service operation performance, enabling you to optimise productivity and maximise engineer utilisation.

Performance metrics include:

- number of contracts due for renewal in the next 30 days
- number of unallocated calls for the day
- percentage of calls for the day that are unallocated
- number of outstanding calls
- current call counts by active status
- number of overdue unallocated calls by call service centre

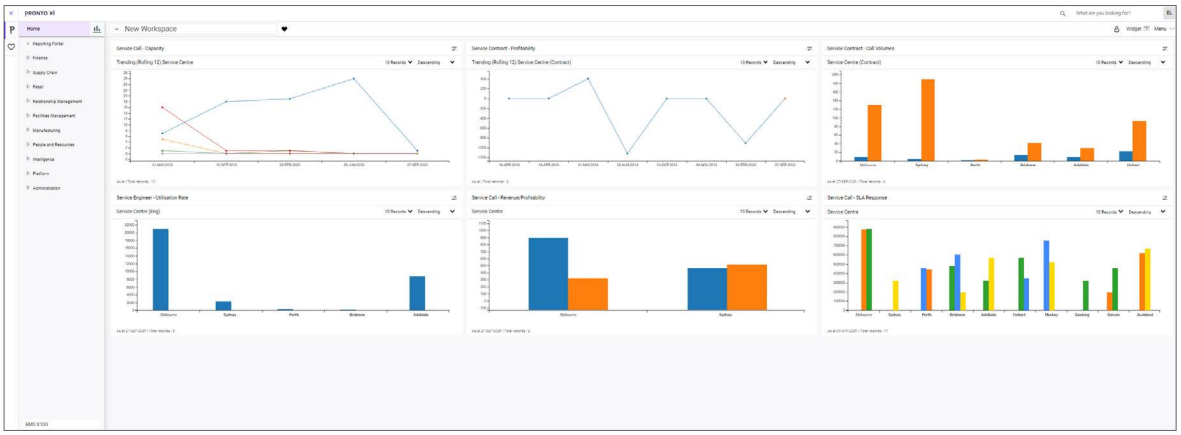
An extended library of Business Intelligence metrics is also available for deeper analysis. Analytics supports effortless analysis and intuitive investigation with easy-to-use drill-up and drill-down data exploration functionality. Analytics Dashboards provide an extended library of pre-built reports and performance metrics to help further improve the performance of your service operations.

Contracts

You can set up service contracts for serialised and non-serialised items, recurring billing values, warranty obligations, preventive maintenance schedules and other user-defined contract types. The contract details define the service units covered, as well as the duration and terms of the contract.

To improve the customer experience, you can use templates to expedite the creation of service contracts and projects. In addition, auto-population of standard parameters helps you to maintain data protocols across your contracts.

For users of Pronto Xi's Sales and Inventory modules, covered service units may include items that have previously been sold to that customer, either directly or through a distributor. Equipment sold by another supplier is also catered for, with a description and serial number recorded separately from your normal inventory.



Get a bird's-eye view of service performance

Time-based service recording

You can use time-based service recording for your contracts' labour or travel coverage. This enables you to sell prepaid service coverage, with three billing cycles available:

- time-based at the contract level
- time-based at the unit level
- time-based at the contract level with voucher numbers recorded.

After you select the billing cycle, you can enter the number of time blocks sold, the duration of each time block and the charge per block. Time-based unit-level contracts require the time details only for serialised items.

Contract invoicing

Bulk contract invoicing routines in Service streamline the invoicing process. They calculate and recognise both earned and unearned contract revenue, providing greater visibility of projected income values.

The invoice value of a contract is the sum of the service rate of the units attached to that contract by one of the many available billing cycles. Customer-facing invoices can be tailored for both contract and calls, with flexible crediting features to cater for partial or full invoice credit arrangements.

Billing cycles

There is complete flexibility in how you set the billing cycle for a contract. When an invoice is raised, Service calculates the amount due for each unit by multiplying the number of billing cycles invoiced by each unit's service rate. The "invoiced-up-to" date is then incremented by the billing cycle period.

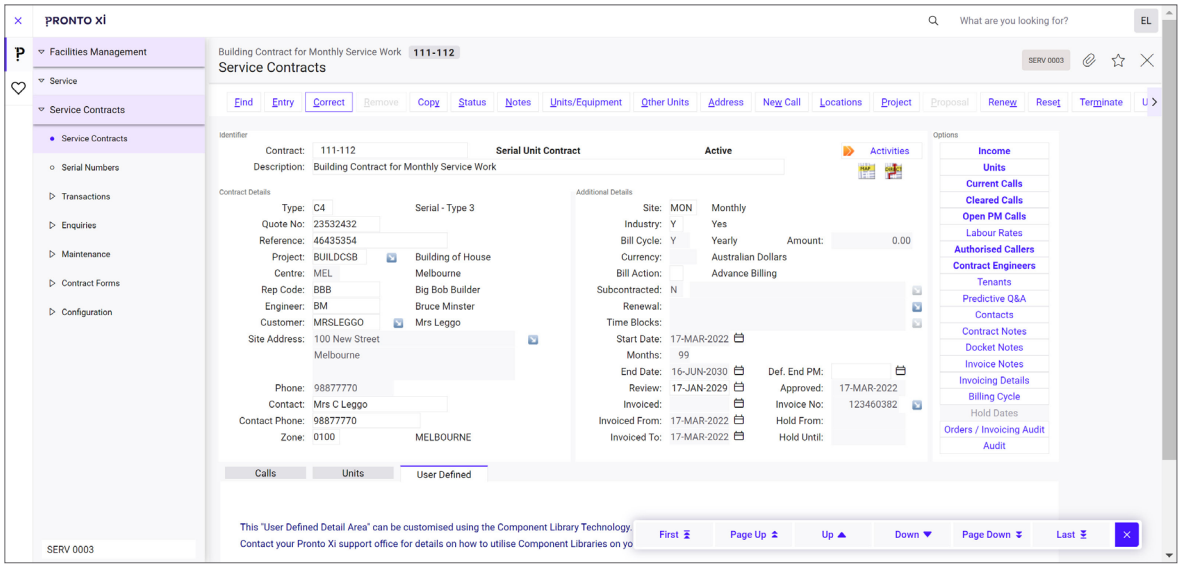
An "invoiced-up-to" date is held for each unit on the contract, as well as for the contract itself. This means that you can add or remove units from the contract, and the next invoice is adjusted on a pro-rata basis.

Advanced billing or unearned income

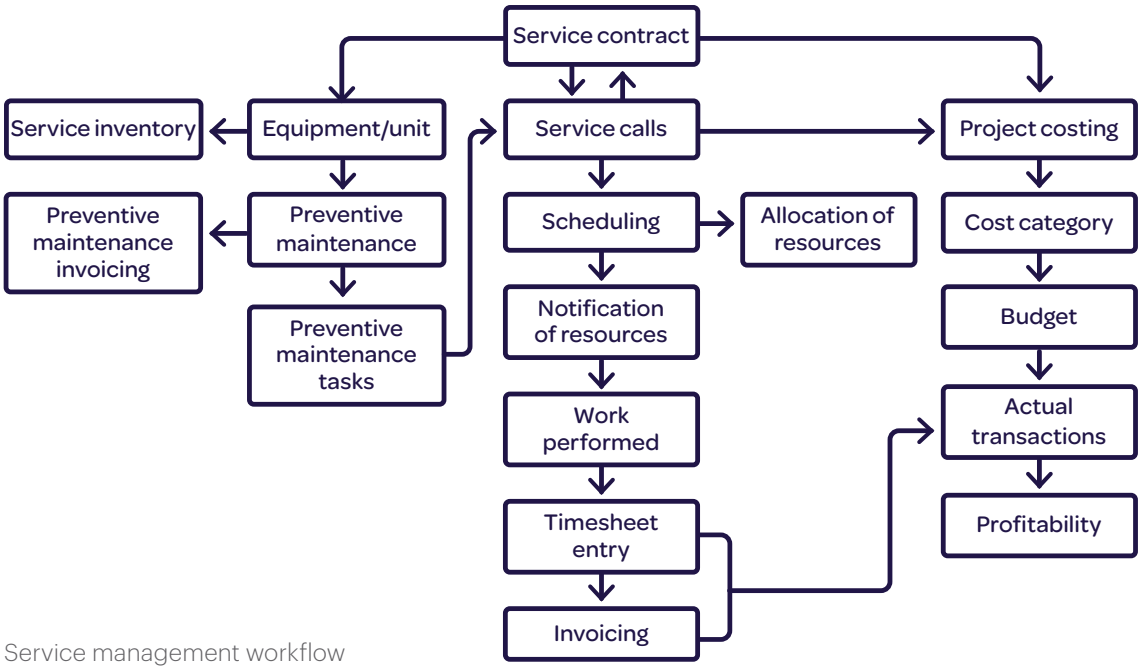
When invoices are raised for service contracts, it is likely they will cover services that may be required in the future. General Ledger considers payments received for such invoices as "unearned income" and records them as a liability until the revenue is earned.

Renewals

To help you get existing contracts renewed once they are close to their expiry date, you can send out up to three renewal notices to customers at specified intervals before the expiry date. If a renewal is accepted, Service automatically creates a renewal invoice.



See all relevant service contract details in one place



Service management workflow

Contract on hold and billing on hold

You can choose to put a contract on hold without closing it. This may occur because:

- the contract is no longer active, but final sign-off is not complete
- the contract may not require billing for a defined period
- there is a dispute

Service calls

Service includes a call-processing component to help you control the day-to-day activities of your service department.

Call logging

Calls can be logged using either the Wizard Call Logging screen or the Form Entry Logging screen, which extend to other integrated Pronto Xi modules such as Service Connect, Mobile Service and Resource Management.

Because each screen of the wizard prompts the user to select the correct information, it is particularly useful for casual users or new users. The Form Entry Logging option is better suited to more experienced users, permitting them to log calls in a minimum amount of time.

To ease the administrative burden of creating service calls for repeated work, the Copy Service Call function allows for a call to be created from a previous logged call.

Logged service calls fall into three main types:

- internal calls, where the unit to be serviced will be brought to your workshop
- on-site calls, where your engineers must go on site
- telephone support calls

Calls are logged using a simple, flexible process that is fast enough to be used by a phone operator. As the call is logged, Pronto Xi performs a credit check and verifies the status of the account in the Accounts Receivable module. Simultaneously, the service site address is validated using Google Maps.

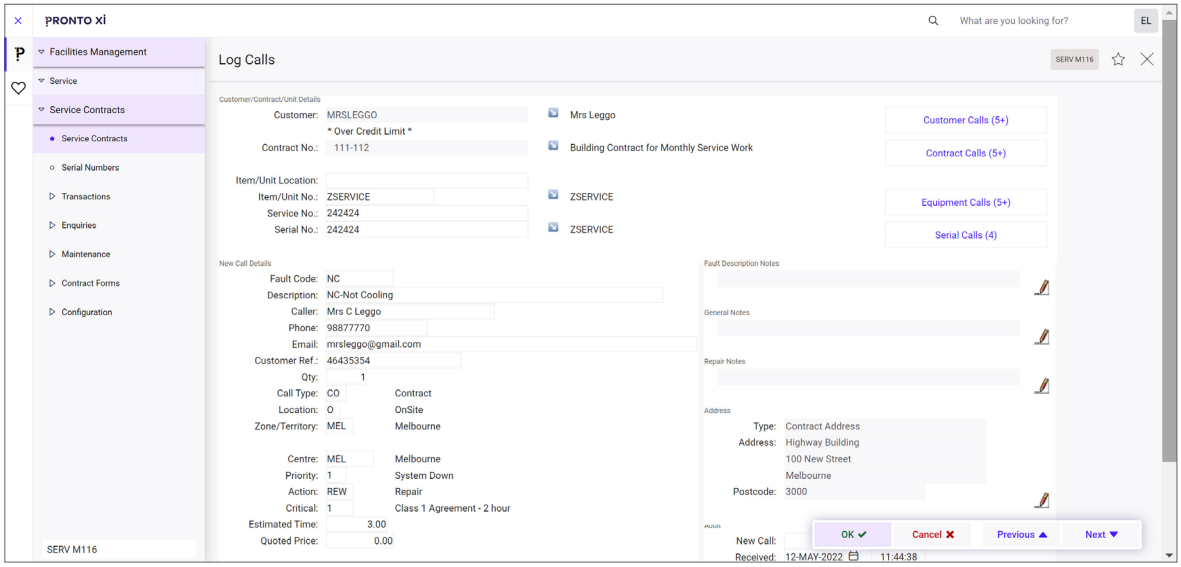
Estimated Travel Time provides a notional representation of travel time to site, based on a time zone table. Resource Scheduler and the Schedule View in Resource Management both display the travel time and then the working time. A separate Google Maps licence is available.

At the time the call is assigned, the operator has immediate access to any existing service history to help them decide which engineer to allocate to the job.

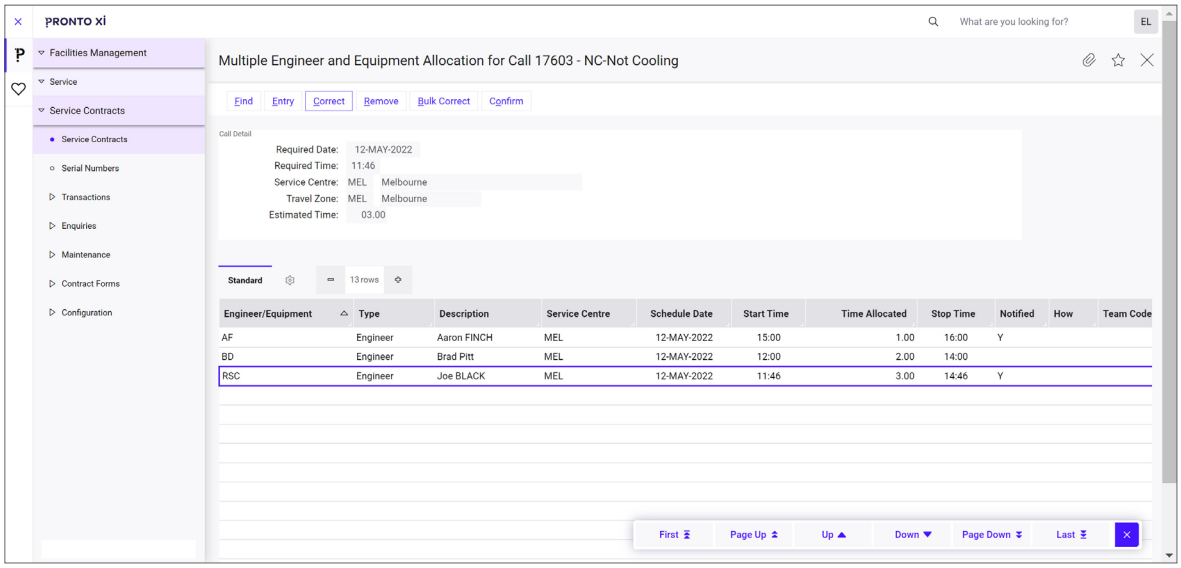
You can also check whether the contract is active and the caller is authorised to place the call, although there doesn't need to be an active service contract to log a call.

Service will identify whether the subject of the call is under warranty. Once the call is logged, a docket showing the address and details of the job can be printed for the engineer's reference. Service supports a variety of pre-printed formats.

When a call is logged, a quotation can be entered at the same time. This places the job on hold pending acceptance of the quotation.



Log service calls raised by back-office staff



Allocate resources to a call

Service call maintenance

Combining all major service functions in one central area, the Service Call Maintenance Desktop gives operators a complete view of their service operations in a single screen, allowing for fast and efficient processing.

With drill-down capabilities at the click of a button, the Service Call Maintenance Desktop gives operators access to detailed information and functionality without leaving the Desktop.

Contract and call enquiries

The Selective Contract and Call Enquiry function makes it easy to search for service information, with parameters including service centres, outstanding service calls or engineers. The search results are displayed in a data grid, which supports flexible reporting methods.

Critical calls

Service offers multi-level call monitoring to allow you to measure actual performance against call level and contractual obligations.

Critical codes provide the building blocks to define the targets that need to be met. They are automatically set against service calls according to defined rulesets, or are set manually as required.

Service call transactions are then used to record when key milestones – Response Time, On-Site and Completed Repair – are met throughout the life cycle of the service call. By comparing these actual times to the target times calculated by the critical codes, you receive better insights into customer and contract-based service levels.

In addition, by storing target times against each service call, service teams and administrators can be informed of milestones that might be missed. This will enable them to take pre-emptive action to meet the targets or allow them to manage customer expectations.

Service centres

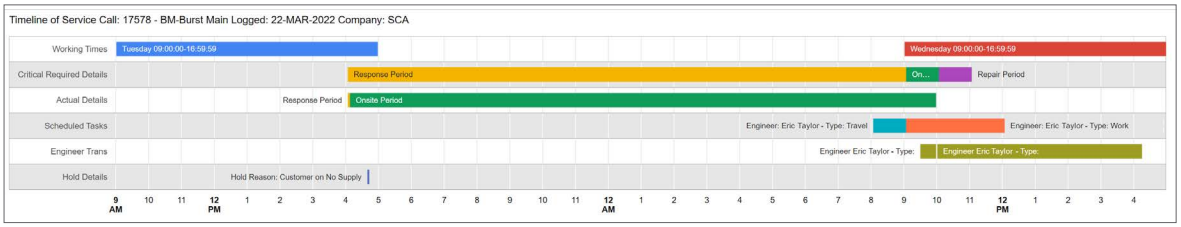
Service calls are usually logged in a service centre, which may be a workshop where the service work is actually carried out or a centralised base that monitors service calls and distributes them to engineers who travel to sites to perform the work.

If you have a centralised service centre taking calls from various regions, the regions can be identified at the time the call is logged. For a region in a different time zone, the call is automatically logged in the time zone of the customer making the call.

Notes

There are more than seven different types of notes within the service module, ranging from repair notes to contract notes.

Carryover notes highlight additional information specific to each service call. For example, the service centre can input temporary key collection points or safety requirements to ensure the engineer is aware of them before they attend the site.



See how the service call had been tracked and if the call response was within the target time with a timeline visual

Preventive maintenance

Service offers in-built flexibility for generating preventive maintenance (PM) calls. It uses the following approach:

- Detailed PM service calls are generated in accordance with the equipment routine frequency
- Equipment on the contract is maintained on a scheduled maintenance basis
- PM calls are generated in a run format within a routine hierarchy sequence. This a type of contract that produces a service call for each scheduled maintenance visit
- Calls can also be set to a standard PM run that produces a call for all scheduled visits due on the same day that are allocated to a particular run

Hierarchical run-based PM calls are managed by consolidating serviceable equipment within a single PM service call for each run. Service technicians can then perform each routine for the service run, all within Mobile Service. If monthly and weekly tasks are due at the same time, the incremental weekly tasks for the month are automatically generated.

With Resource Management turned on, you can allocate resources as a single engineer, as a team or by attribute codes. You can choose to not allocate an engineer on weekends or non-working days, or can allocate them automatically based on their next availability.

Equipment locations

Equipment Site Location lets you record the location of any item or piece of equipment belonging to a service contract, making it easier for engineers visiting the site to find the equipment.

Office staff can use location data to examine the history of work at a location or for a specific piece of equipment.

Location codes can refer to a hierarchy of attributes and attribute sets. These generate additional information about an item's location, which is a useful option for large or complex sites.

Locations are managed against a contract as free-form text. They can then be attached to equipment or units.

Equipment on contracts

A contract can include one or many pieces of equipment that are serviced. These units can be serialised or non-serialised, have been sold by the service provider, have a PM component or be marked as a single unit.

Van inventory

For ease of tracking inventory, Service recognises an engineer's van as a "location" that is attached to the warehouse from which the inventory has been taken. Inventory levels can be checked and regulated as required, and replenishment ordering can ensure that necessary inventory levels are maintained.

Engineers' vans can also be set up as individual warehouses so that stocktakes can be done for one unit or a group.

Integration with Distribution

Because Service is fully integrated with Distribution, inventory allocations to service calls can range from informal material issue through to formal picking slips creation.

Service is also linked with Pronto Xi's Purchasing functionality. Purchase orders can be created and the entire procurement life cycle managed against each service call. Calls can be set to Parts Required status to keep service technicians and their customers informed throughout the call and purchasing process.

Engineers

Each of your engineers is linked to a specific service centre and service calls are allocated accordingly. If required, calls can also be allocated to engineers from other service centres.

The activity of each engineer can be displayed in Resource Scheduler, allowing you to develop and monitor their call schedule. Payroll can also store the employee number of each engineer, so you are able to record additional payroll information.

Service visually displays incoming service calls and engineer workloads, and its integration with Resource Scheduler allows calls to be allocated to engineers using the drag-and-drop method.

Integration with Resource Management

Resource Management is an optional module that can be activated by service centre.

When Resource Management is activated, it supersedes the standard service call allocation by allowing you to see all your resources in the Schedule View and then filter by attributes (which can be defined by the engineer's skill set and skill group). This allows you to understand who is available and when.

You can also allocate multiple resources – including personnel, sub-contractors, teams and equipment – from one centralised screen.

The Resource Master Screen can define the resource type, status, award, location and calendar – the essential elements and characteristics of each resource that feed into allocation considerations.

Call resources

Once a call is logged, it can be allocated to a single engineer, multiple engineers or even a team of resources. You can have the system set up to do this as the call is entered, or choose to have an engineer recommended based on contractual preference, skill, attributes, territory or availability.

Service can automatically notify an engineer of a call allocation using Pronto Xi products such as Service Connect or Mobile Service, or via SMS or email.

The status of a particular call can be checked at any time. Calls can be grouped by engineer, making it easy to see if someone is behind schedule so their calls can be reassigned to another engineer.

Pronto Xi records "real-time" work on each call as well as billable time. Once work is complete, you can enter full details from the docket, including the fault, which can be assigned a code so you can analyse calls by fault type.

Cancelled calls and finished calls are retained on file and can be reactivated into live calls at any time, even if they have been archived.

When a call is complete, Pronto Xi generates an invoice that includes amounts for labour, travel, a call fee, parts used and metered charges. A replacement unit or component can also be recorded at this point, and the customer's contract amended accordingly.

Tailored minimum time blocks can also be charged within the billing cycle of a service contract to pre-bill blocks of time, which are consumed at the call level as engineers post timesheets.

Preferred and blacklisted service engineers

Any contract site can hold a table of preferred engineers. Your clients can build trust in familiar engineers, leading to increased customer satisfaction.

Conversely, you can blacklist technicians in the preferred engineer table to block them from specific customer contracts.

Allocating resource teams to service calls

People, equipment and resources are often allocated together on service calls, plant work orders or project tasks. Resource Management allows you to predefine these teams for faster allocation.

Linking equipment to engineers

Within Resource Management there is a resource type called “equipment”, which is either serialised inventory or assets. Equipment can be linked to an engineer or can be standalone.

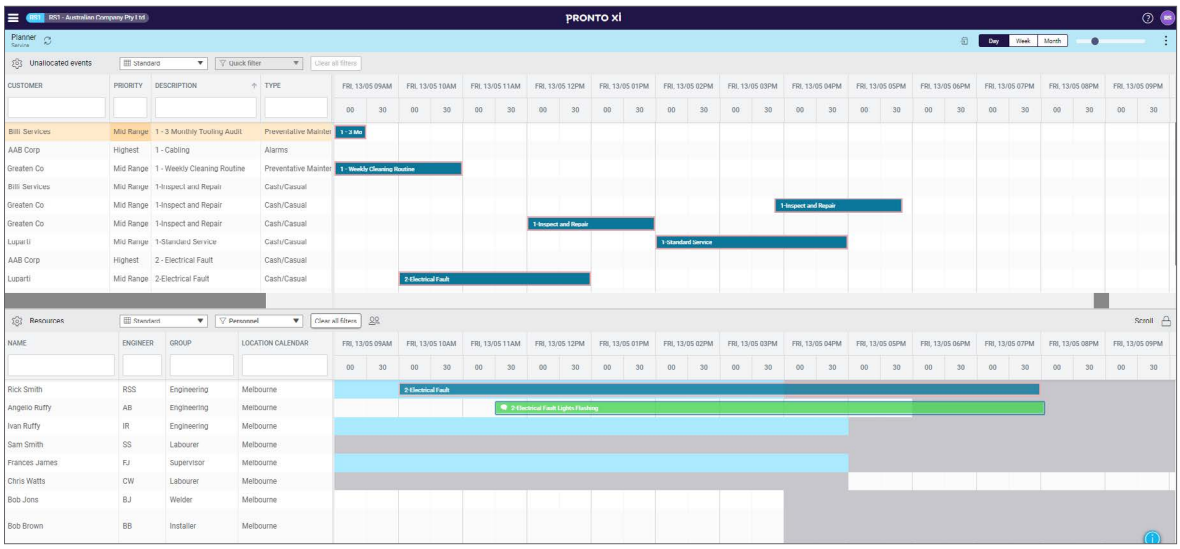
For further insights, Pronto Xi provides a visual that helps you to see which engineers are linked to which equipment, and to know when certain equipment is booked out on a particular service call.

Integration with Resource Scheduler

Resource scheduling is essential to service, project and maintenance management activities. Pronto Xi’s Resource Scheduler enables your projects to meet deadlines, stay on budget, and ensure minimum strain is placed on employees and resources.

You will also be able to allocate the most appropriate service engineers – including required equipment – to carry out service work. This functionality is equally applicable to fulfilling maintenance work order requirements.

Once the Resource Scheduler is in use, planning will be based on historical data and adjusted to anticipate bottlenecks and low activity periods, eliminating guesswork.



Set the Resource Scheduler view service-only resources and service calls

Mobile Service

Deliver the information your technicians or field engineers need, **anytime, anywhere, with Mobile Service**

Using web-based technology, Mobile Service links directly with Service to allow you to efficiently log, process and track all service activities. It is also flexible enough to manage all reactive and predictive service calls while ensuring you meet and exceed your service level agreements (SLAs).

Keep the wheels turning

Mobile Service delivers a complete feature set – from call management through to invoicing and payment receipt – making it the ideal field service solution for commercial and consumer service organisations.

When Mobile Service is used in conjunction with Service, you get a powerful service delivery platform that simplifies complex routines. By giving you more time to manage exceptions and uncover richer business insights, it generates greater efficiency and helps give your business a tangible competitive edge

Real-time information

With Mobile Service, your field workforce stays connected and informed. Your managers have fast access to real-time information, whether they're creating and dispatching calls or measuring performance and overall productivity.

To ensure the fastest possible call-to-cash process and, in turn, reduced days sales outstanding (DSO), Mobile Service provides service technicians with the information and functionality they need to carry out all predictive and reactive works. At the call conclusion, they can invoice the customer and collect payment via a secure payment gateway.

Automated back-end processes – such as updating timesheets and purchase order commitments – ensure that all the data captured throughout the service routine is represented on Mobile Service's summary screens and on the customer invoice. Technicians can also choose to email the invoice if their van does not have a physical printer.

Mobile Service has been designed to suit complex B2B and B2C service delivery environments. It allows multiple technicians to undertake work on the same call, and maintenance schedules for multiple items of equipment to be managed by a single technician.

A separate Google Maps licence is available.

Data capture

Because information can be updated on the go, Mobile Service helps field users manage their day-to-day workload, particularly when there are unplanned events.

Easily capture van parts that have been used, complete timesheets, raise purchase orders, raise materials orders from a central warehouse, and add photos. Mobile Service also delivers improved cash flow as customer signatures are captured on site, reducing the time between completing the job and charging for it.

Connectivity

If a field engineer goes offline, Mobile Service will store all necessary data within the browser cache of their mobile device and upload it as soon as there is a connection.

Notes and documentation

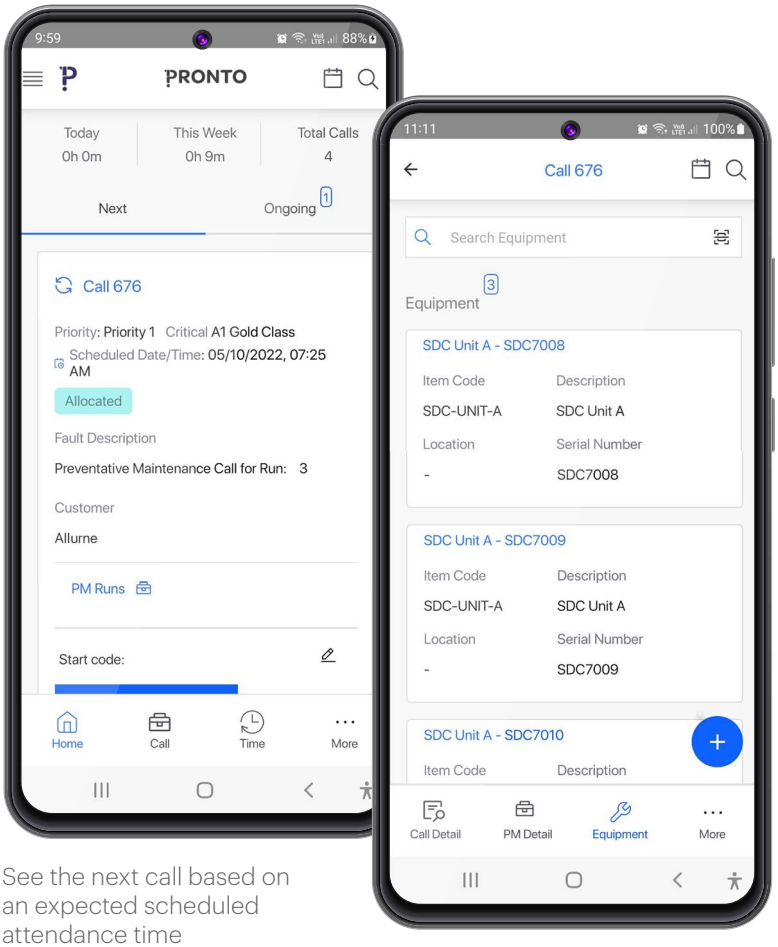
Mobile Service delivers a level of technical document management that is unsurpassed by any other offering. Link diagrams and specifications to your jobs, make comments, and sketch annotations.

You can also save notes, allowing you to easily to collaborate with your teams. Take photos, attach them to your job and annotate them.

Scheduling

Mobile Service incorporates a My Schedule view of all allocated service calls and their required start times, allowing engineers to plan their days or weeks. In turn, this ensures better workforce utilisation and improved forward planning.

Office staff can also easily schedule engineers' days and see their activities in real time, with Pronto Xi's Resource Management and Resource Scheduler modules seamlessly updating information flow between applications.



See the next call based on an expected scheduled attendance time

View all equipment for a call

Proof of presence

As a part of commercial compliance, on-site engineers are often required to obtain a customer signature as proof of presence.

As Mobile Service is paperless, field engineers can easily log proofs of presence against transactions in a service call.

Safety compliance

Mobile Service asks engineers before they start work to verify occupational health and safety (OH&S) compliance, including requirements relating to height, temperature, lighting, traffic buffers, electrical safety and more. Due to its adaptability, Mobile Service can ask the questions that are most relevant to your business and your people, giving you greater control over workplace health and safety practices.

Invoice attributes

To cater for flexibility in relation to on-site customer billing arrangements, the 'Process Attributes' feature allows contract managers to activate or deactivate invoicing and payment receipting features at a customer, contract, service type or service centre level.

Easy adoption

If you have ever introduced new procedures and forms to your mobile workforce, then you know that compliance and adoption are difficult. Because Mobile Service makes daily routines easier, changes can be adopted very quickly.

In Service Management the administration user can configure the front end mobile screens to display the information required to the business

Material orders

Engineers can request parts via a material requisition for either their van or the service call. Requisitions can be created directly on Mobile Service, eliminating the need to call the office, and are fully tracked within Service, Inventory and Mobile Service workflows.

As a result, material requests during service calls are more visible, and the stocking and distribution of supplies is more efficient

Navigation

The Mobile Service landing page serves as a hub of daily functions, allowing users to quickly access the most important functions at the click of a button.

Work instructions

Mobile Service's Work Instructions functionality provides a series of questions, tasks and notes that step an engineer through the work needed to complete a service call.

Businesses can track the required procedures, ensuring that all mandatory activities of a service call have been completed.

Work instructions can also function as customer site forms, which can be presented to the customer via email as a reference for completed work.

Serial attributes

To deliver increased compliance, identification and reporting capabilities, you can set unique attributes against serialised stock and serviceable units.

Use templates to define standard equipment attributes, then copy the templates from one equipment profile to another to facilitate the setup and management of customer-owned equipment held under a service contract.

Adding new serviceable items

With Mobile Service, engineers can add new serviceable items as they identify them during their service run. They can also include relevant details, such as make, model, serial number, installation and warranty dates.

Once captured, the service contract's Pending Units table stores the identifying details, waiting for approval before they items are allocated to a contract.

With this easy-to-use mobile interface, engineers can identify and capture all related equipment at the start of a new maintenance contract, or capture units that have been from an existing contract.

Call escalation

Superior customer service delivery hinges on your ability to respond to critical issues within agreed time frames.

Mobile Service provides critical call escalation routines that manage high-priority calls. This feature constantly monitors calls and escalates them to ensure they are responded to, attended to and repaired within the customer's SLA.

Service Connect

Keep your customers **informed** on the progress of service calls with Service Connect's easy-to-use online web portal – freeing up your service centre resources

An extension of Service, Service Connect empowers your customers by giving them access to up-to-date service call information – including their own history and conversations. This engaging service experience increases customer satisfaction, as they remain informed every step of the way.

Key features of Service Connect include:

- quick deployment to customers
- an intuitive modern web interface that is accessible from any device
- the ability to raise and track current and past service calls
- full integration with Service
- seamless synchronisation of key data
- easy customisation options to support your business processes.

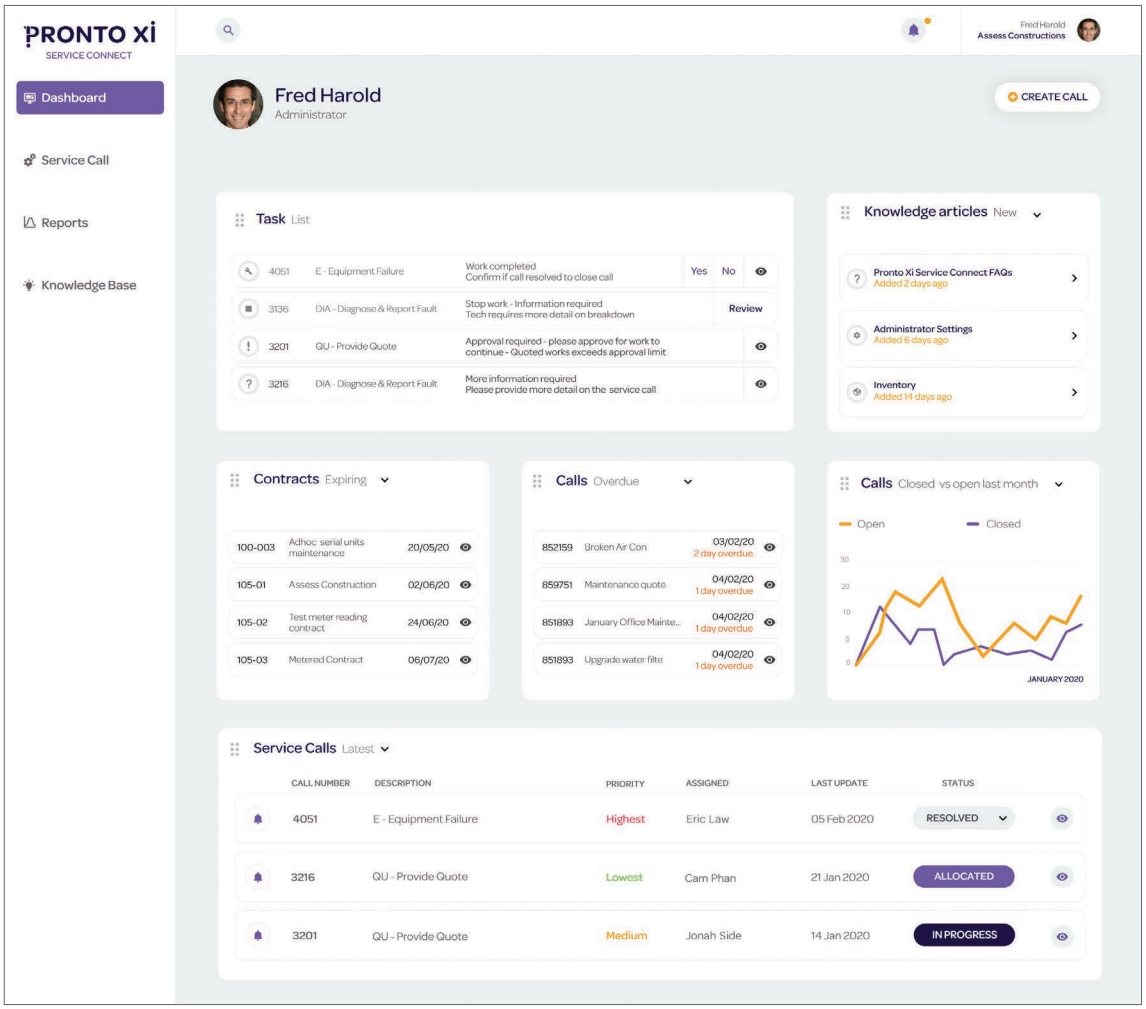
Service call creation and tracking

Your customers can create and track service calls in real time, allowing them to plan work around ETAs.

They can start conversations directly with the service staff and navigate chats in an easy-to-follow timeline, helping them to feel looked after.

Users can find the information they need by applying filters, which help to remove distractions and enable quick actions.

To quickly provide detailed up-front information, customers can scan items using a device camera or upload images. In turn, this allows your staff to deliver faster call resolutions.



View call information via the Service Connect Dashboard

With convenient access to the Service Connect portal on any device, customers no longer need to phone your staff to obtain progress updates. This means your teams can focus on completing the service call satisfactorily, helping your business to achieve service excellence. Invoices can also be easily accessed by your customer's accounting teams, ensuring timely payments.

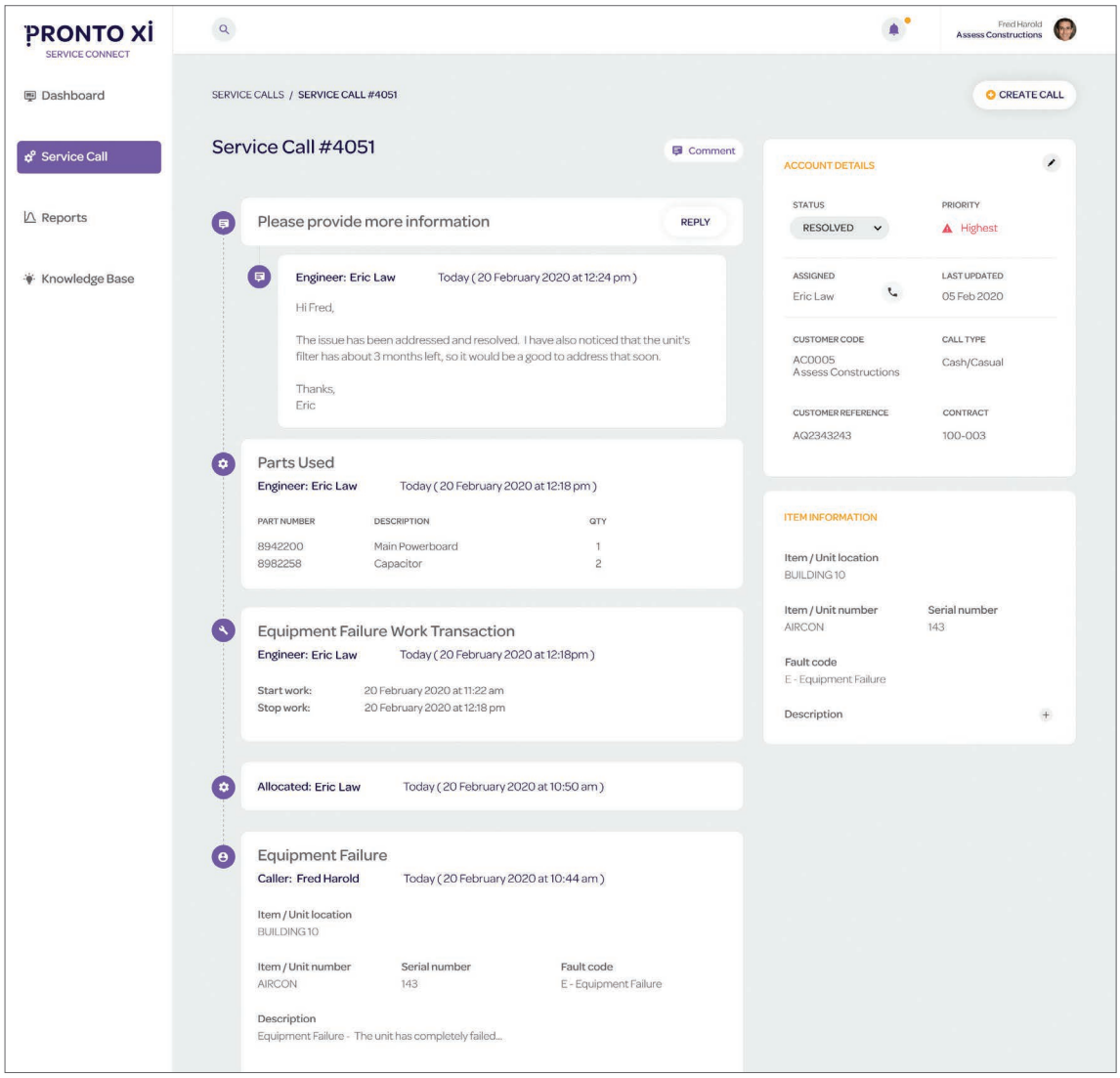
User and call management

Service calls can be managed end-to-end when Service Connect is used in conjuction with Pronto Xi's Resource Management and Mobile Service modules, meaning your staff spend less time managing a call or locating disparate information and more time resolving the problem.

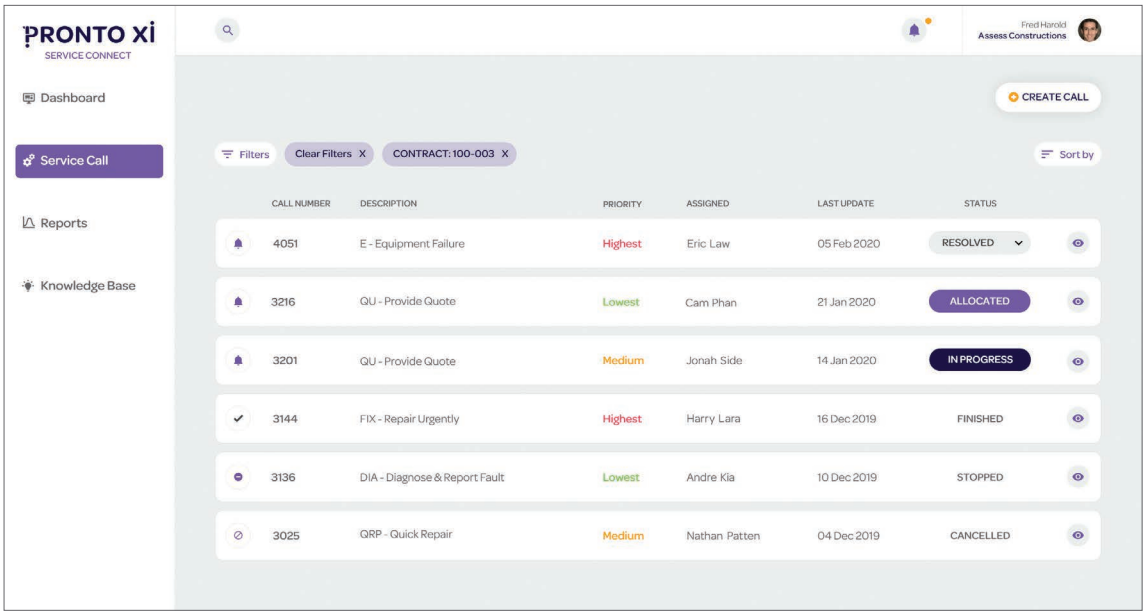
All service calls logged via the Service Connect are fully audited, allowing back-office staff to track the calls and their histories.

Different user types are associated with specific roles and functions within the application:

- Service desk administrators and executive users – these roles manage your service desk, and have access to all call information and the ability to change any details on any calls; administrative users can also set up advanced configurations for forms and data fields.
- Customer users – your customers get a limited access account, which allows them to see calls that their company has raised and manage the work accordingly



View a timeline of important milestones



See the status of individual service calls

Maintenance Management

Reduce breakdowns and service costs by leveraging Maintenance Management to make sure your equipment is in **top shape** – then ensure the right parts and people are available if something goes wrong

Mind your overheads

Maximise your planning and control of plant maintenance activities with Maintenance Management.

Effortlessly monitor your preventive and predictive maintenance, plant downtime, failure rate against targets, expected life, fault repairs, and equipment and repair costs within a single comprehensive module.

Maintenance Management automatically collates vital data from across your facilities, giving you full control over how you view your outcomes. Swiftly spot failures and identify maintenance improvement opportunities with fault analysis reporting, and keep an eye on repairs with full work order integration.

Some of the key features of Maintenance Management are:

- full equipment profile of components and parent items
- priority work order allocation
- condition monitoring
- automatic inventory allocation
- work order forecasting
- work request process
- configurable monitor points
- defect work order recording
- integration with Microsoft Project
- stock purchasing
- customer invoicing for completed work

Equipment information

Maintenance contains an Equipment Register, which records detailed information about the equipment.

Items can be classed as:

- Asset – relates to a fixed asset.
- Component – relates to an inventory item.
- Level – used in costing/enquiry mode, and relates plant items to each other

You can identify each item by its own unique number as well as an identifier related to a fixed asset or an item serial number. This means you can quickly identify items and allocate maintenance details to the correct item.

The identifier may reflect an existing equipment numbering system already in use.

Equipment can be grouped by cost centre, type and location, and categorised by equipment, assemblies and sub-assemblies.

The Equipment Register records manufacturer details, as well as information such as the supplier, warranty date, installed costs, installation date and other associated costs. Budgets and actual costs incurred are held by plant item per period per year for labour, materials and usage.

The Plant Tree view allows easy access to the plant item records, and provides a clear overview of plant items and their components.

Preventive and predictive maintenance

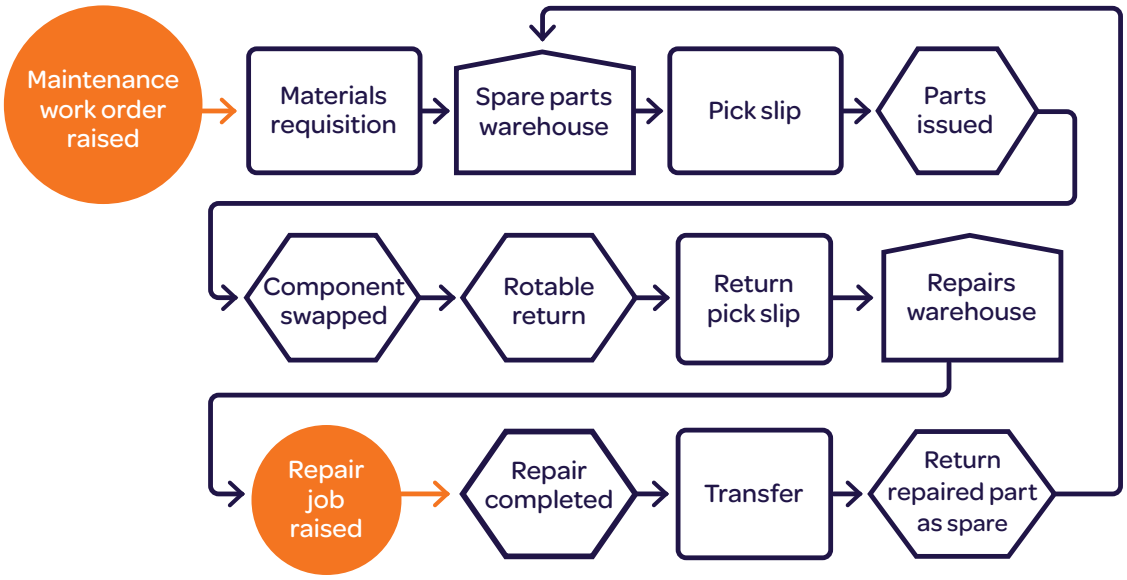
Plant managers can implement a maintenance strategy in the form of preventive and predictive maintenance tasks. It can be implemented based on run time, condition, statutory inspection requirements or scheduled shutdowns.

Pronto Xi's flexible Preventative Maintenance (PM) Tasks functionality can be tailored to specific schedule service intervals and frequencies. Because PM Tasks has a one-to-many relationship with plant items, any changes to tasks automatically flow through to all attached serviceable items.

Plant managers can compare "scheduled" versus "actual" for both activity and costs. Full cost history reporting assists with decision-making in relation to replacing or maintaining equipment.

Fault reason codes

You can record fault reason codes against work orders before the completion of work, allowing you to analyse and track work orders by fault reason code during the life cycle of the work order.



Workflow of work orders in Maintenance Management

Returning materials to an alternative warehouse

When you're managing picking slips for work orders, you may need to return allocated materials to an alternative repair warehouse. If this is the case, the warehouse code on the picking slip header can be changed to an alternative warehouse when you raise the return picking slip.

Component change-outs

A "rotable repair" refers to a new or previously repaired item or component that replaces a failed item, which in turn is repaired and kept for another exchange.

There are effectively two processes:

- The repair of the plant item, where the rotable item is one of the components of the repair. (The repair could include multiple items, with the rotable item being just one of many items)
- The repair of the rotable item itself

An item of plant and equipment may consist of several large components – for example, a truck will have an engine, drive train, suspension and pumps. The pressure to keep a truck on the road means its maintenance needs to be completed quickly. It is often more efficient to replace a large or complex component than repair the component, as the plant item is quickly back to being productive. The large or complex component can then be repaired over a more manageable time frame, or be sent out to a third party for repair.

Components removed from a plant item during maintenance are not always scrapped or discarded – an item such as a truck engine, for example, can be reconditioned and re-used. Many reconditioned components have a limited overall life, however, and will eventually be scrapped.

Tracking components

Using Pronto Xi's Inventory and Project modules, you can track the components being repaired, scrapped or reworked, whether this occurs in-house or via an external service provider.

This is controlled via a picking slip workflow.

Work order management

Maintenance Management provides tools to manage the full work order cycle, from planning to completion.

A wide range of reports and enquiries are available to assist users to prioritise and plan maintenance work orders. You can search for work orders based on components, related plant items, or via text string pattern searches.

Work orders can also be set up to approve the printing of any specialised documentation, licences or plans.

Maintenance work order planning

Enter maintenance requirements directly into Maintenance Management as a work request, then review the request and reject or approve it, or set it to a status of Defect. Defects can then be addressed, and corrections and maintenance tasks planned and scheduled.

You can also generate an estimate of hours, equipment and parts required for the task. This information may be predefined on a preventive maintenance task and used as a template for the work order.

To allow meter readings, comments and actual downtime or duration to be captured, the status of a work order changes progressively until completion.

Work order forecasting

Use work order forecasting to produce the maintenance schedule, confirm manpower requirements, and analyse key performance indicators (KPIs) to understand scheduled loading and completion trends.

Work order forecasting also allows you to generate preventive maintenance work orders when they become due. Planned maintenance can be entered into the system, transferred from a work request, or converted from a work order forecast.

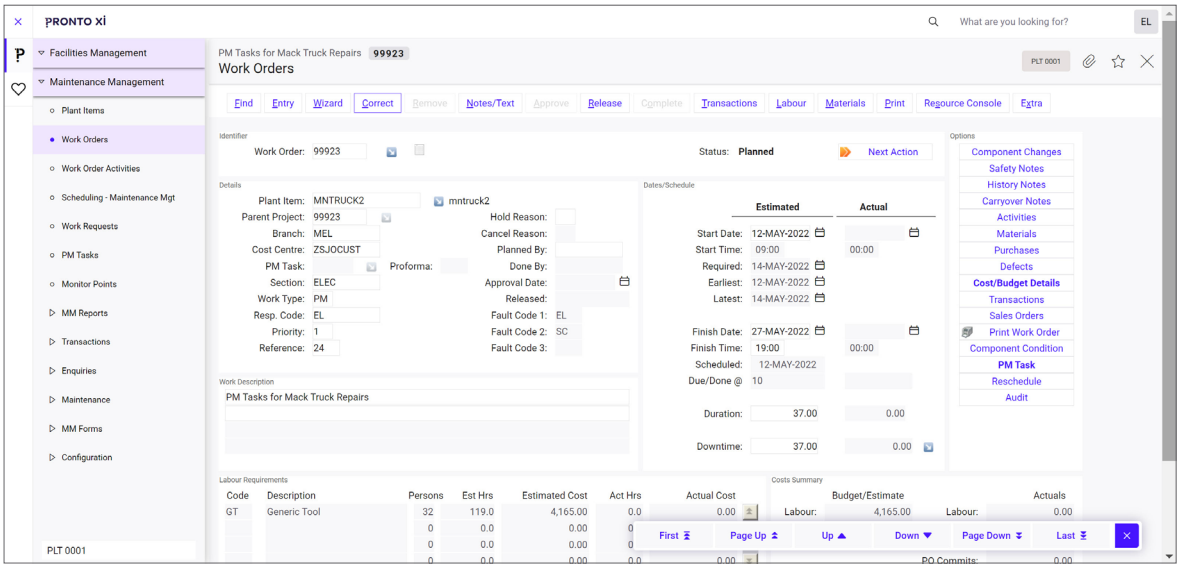
Once a work order has been generated via the forecasting process and issued to the person responsible for maintenance, it is in progress.

Work order priorities

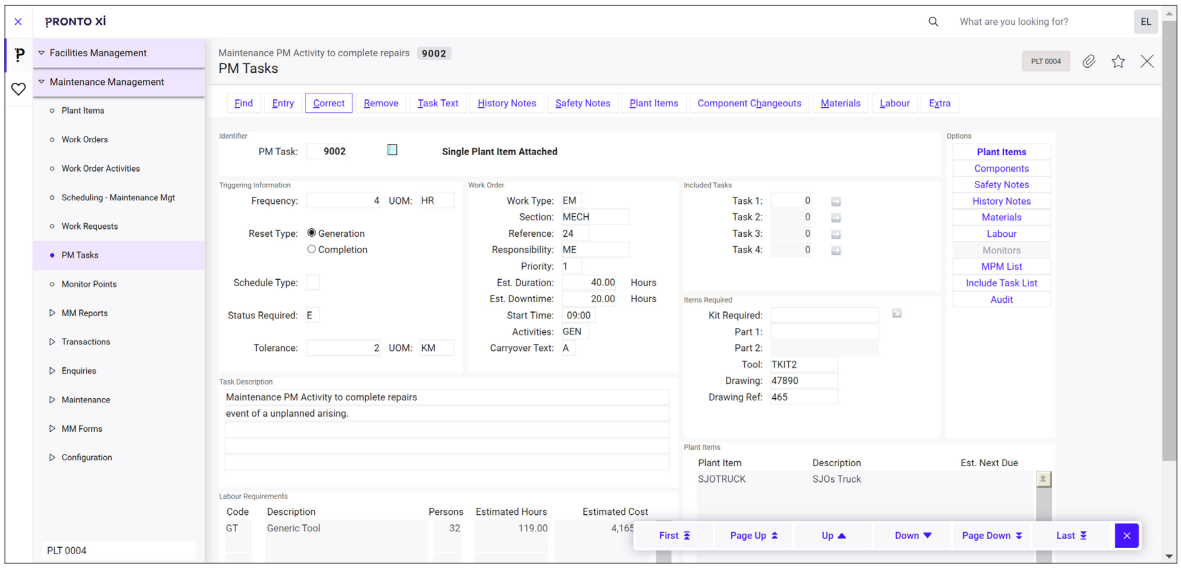
Maintenance Management supports work order classification and escalation by priority. The use of priority codes enables key work to be planned and executed in a timely and efficient manner.

Resource planning

The predicted workload for each type of labour can be compared to the available working hours, helping to identify potential work overload.



Create and maintain work orders



Create tasks from your work orders

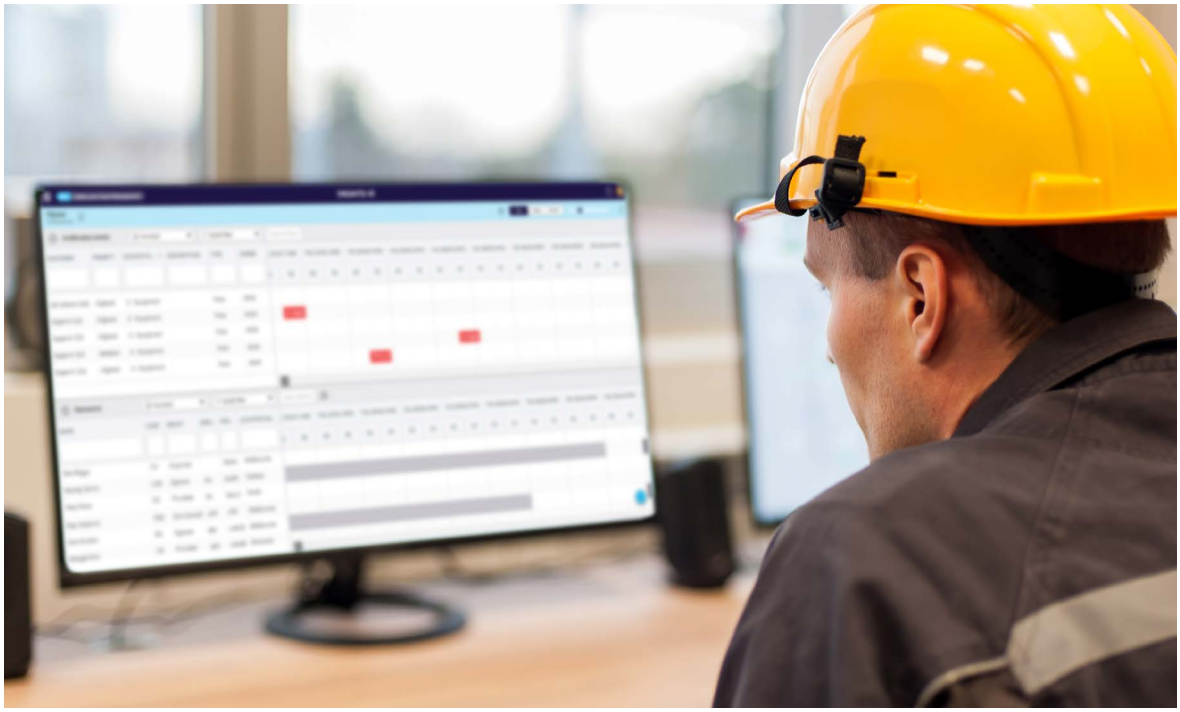
Integration with Resource Management

Maintenance Management works seamlessly with Resource Management, providing a significant boost to your maintenance productivity.

You can prevent scheduling issues and conflicts with planned maintenance by treating the plant items as resources and updating their availability information.

Generic resources can be associated with your Maintenance Labour Categories. You can also group and assign resources to work orders as a team, simplifying your maintenance planning.

Resource Management also allows sub-contractors or users to accept or decline work orders, projects task or rosters via email without logging onto Pronto Xi.



Integration with Resource Scheduler

Resource scheduling is essential to service, project and maintenance management activities. Pronto Xi's Resource Scheduler enables you to meet deadlines, stay on budget, and ensure minimum strain is placed on employees and resources.

Resource Scheduler allows you to allocate the most appropriate resources to carry out maintenance work order requirements. Once the Resource Scheduler is in use, planning will be based on historical data and adjusted to anticipate bottlenecks and low activity periods, eliminating guesswork.

Inventory management

Manage your spare parts availability with inventory management. Inventory control, warehousing and purchasing are all supported when Maintenance Management is linked to other modules of Pronto Xi.

Serial number tracking of component issues allows you to easily identify component items within a plant asset.

Integration with Inventory and Purchasing

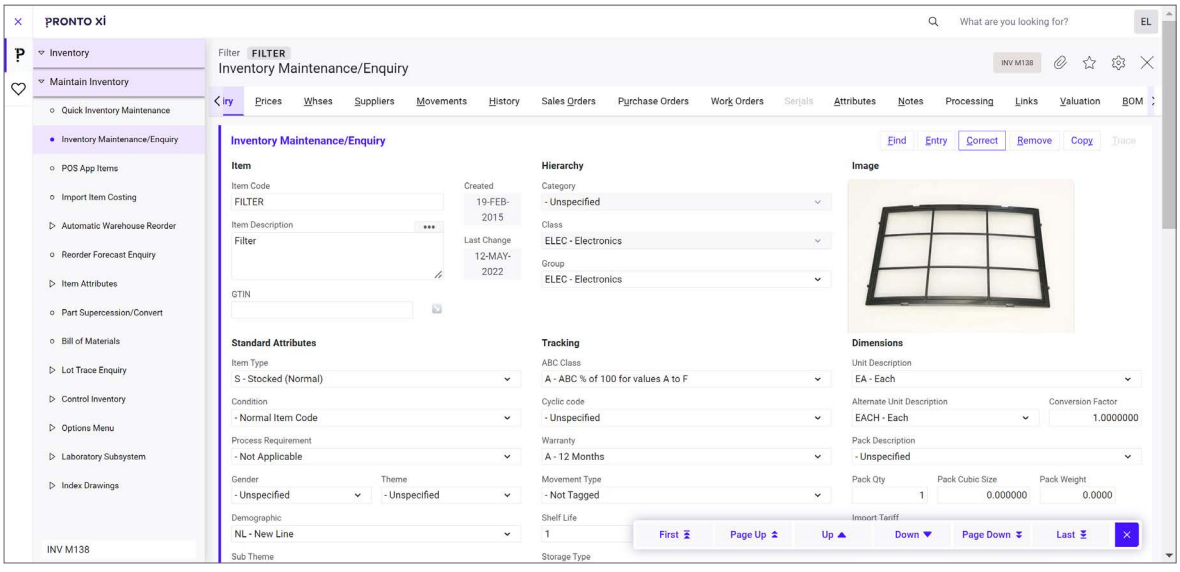
When coupled with Pronto Xi's Inventory and Purchasing modules, Maintenance Management provides optimised warehouse throughput and customer service by intelligently controlling movements of replacement parts into, around and out of the warehouse.

Maintenance Management keeps track of both repairable and rotable inventory items, including the procurement of necessary parts and services. Inventory contains a wide range of reports and on-screen enquiries into inventory levels, prices, sales orders, purchase orders and historical sales.

Purchasing provides a number of functions to help you plan future inventory requirements. By combining data on inventory levels, sales history and current commitments, you can automatically generate purchase orders based on a number of flexible criteria.

Intelligence

Perform effortless and deeper analysis of key aspects of maintenance management using Analytics Dimensions. A pre-built hierarchical data format allows intuitive analysis of plant items, work orders and work order transactions using easy drill-up and drill-down navigation.

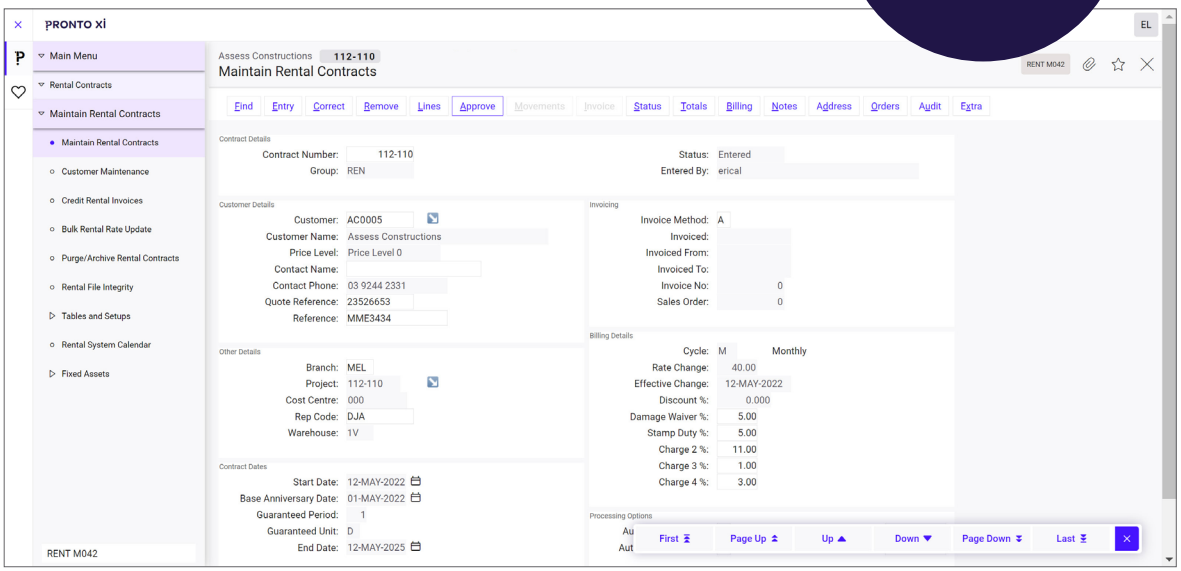


View and enter detailed information about an inventory item

Rental

Track rental contracts with Rental's **fully integrated, flexible system** – so you don't have to chase them later

Hire power



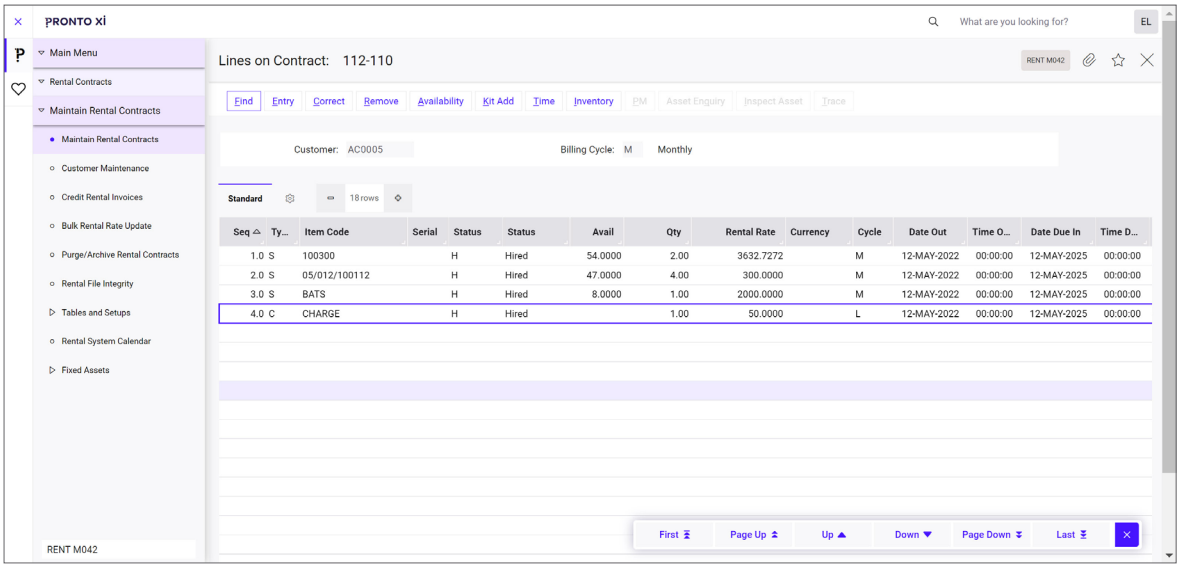
Create and maintain all the details of a rental contract

Rental works from your agreement with your customer, so the rental contract defines the units rented and the conditions of the rental.

It keeps a comprehensive inventory of your serialised rental items – including asset depreciation, service and rental history records – helping you understand what is making you money now, and what will make you more money in the future.

Key functionalities include:

- contract authorisation
- flexible billing cycles
- multiple sites management and contract grouping
- recognition of unearned income
- contract copy function
- serialised and non-serialised rental units
- pro-rata catch-up invoices
- full rental history by unit
- depreciation and returns for items
- automatic creation of assets through integration with General Ledger



View details of any rental contract

Financials

When a rental contract is created, a percentage value can be added for stamp duty and damage waiver. You can create reminder notices when invoices are overdue, and can archive all customer correspondence within the contract notes.

Rental offers the flexibility of multiple billing cycles. You can opt to charge a deposit, invoice immediately or at a later date, and control the billing of items in a contract.

Depending on the agreement with your customer, you can increase rental rates based on consumer price index (CPI) or use periodic increases.

Rental's complete integration with Pronto Xi modules such as Project and Service means you can attach and post all revenue from a rental contract to a project and schedule the preventive maintenance of your equipment.

Rental is fully auditable and allows you to define the functions that can be accessed by each staff member.

Charges

Any extra charges (for example, a physical item, an attached service such as transport or installation, or simply a cost incurred) associated with the rental of a unit are linked to the particular unit on the contract line. They are terminated from the contract at the same time as the unit.

These charges can also be invoiced periodically, or by a lump-sum charge on the first invoice.

The charges are represented by an item code entered in the inventory master file. If they represent a physical item supplied on the rental contract, they are effectively "expensed" when the contract is created. Service options can be defined as a special (non-stocked) inventory item.

Fixed asset units

Rental links to Fixed Assets, so that the serial number of a rental unit is assigned to the fixed asset. This allows you to account for the depreciation costs of the unit.

Contract invoicing

Customer invoicing is easily managed in Rental.

The invoice value of a contract is the sum of the rental rate of each "on hire" or "allocated" unit, addition and option.

The invoice process is designed to bill in accordance with the billing cycle set out in the contract. Depending on the agreement, billing will take place in arrears or in advance.

Depending on your accounting requirements, a General Ledger journal may be raised when an invoice is raised. It recognises the value of the unearned income as a liability, which is reduced as the income is earned.

To enable better reconciliation and revenue tracking, all billing history is registered against the contract. The billing history includes periods billed, current and historical rates, and item code details.

Rental also makes it easier to efficiently raise credit invoices for either a partial bill cycle or the last invoice previously raised.

A comprehensive credit process allows for individual contract or bulk crediting if required. Alternatively, an outages function allows a credit to be raised for a given period where equipment downtime prevented its use.

One-off invoices

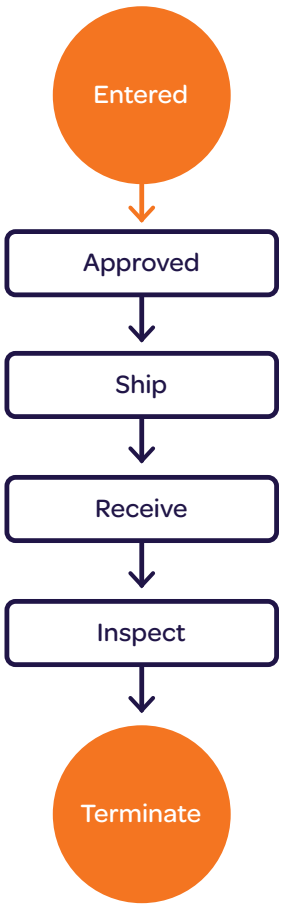
In addition to recurring invoices, "one-off" invoices can be raised when the contract is approved, an item is terminated from the contract, or the contract is terminated.

This allows for adjustments to be made to the initial and final rental invoices using the normal sales order functionality.

Billing cycle

The billing cycle forms part of the rental contract. It can be set to hourly, weekly, monthly, quarterly, yearly or other periods.

Pronto Xi can also cater for rental cycles that exclude specific days, such as periods when weather conditions make it impossible for hired equipment to be used. This also means that invoicing can be done for a seven-day week, a five-day week, or any required combination.



Stages of a contract lifecycle

When an invoice is raised, Pronto Xi calculates the amount due for each unit by multiplying the number of invoiced billing cycles by each unit's rental rate. Units can be added or removed from the contract, with appropriate adjustments included in the next invoice.

By selecting the contract number and the customer code, recurring invoices can be produced in bulk for a set of contracts. Each invoice is posted directly to the General Ledger and to the customer's account.

Payment reminders

Overdue payments can trigger a reminder notice. The contract is automatically updated with notes regarding the reminders.

Tracking

Rental allows full serial tracking of items. Rental invoices and trial balances can be produced at almost any time.

About us

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 1,500 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 Transformation 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.

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