PRONTO Xİ

Applications Overview





The extra mile

Trademarks

Pronto Software, Pronto, Pronto Xi, the Pronto interrobang logo, the P interrobang logo, Pronto Woven, Pronto iQ and Pronto Cloud are all registered trademarks of Pronto Software Limited. All other marks are the property of their respective owners.

Copyright © 2022 Pronto Software Limited (ABN 47001337248).

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.

All diagrams, drawings, product screenshots and any other types of visualisations in this document, use demo or synthetic data created for display purposes only.

CRM Contents

The extra mile	4
Pronto Xi CRM	5
Pipeline	6
Performance metrics	6
Address book and contact manager	6
Attributes	7
Sales management	8
Pronto Xi integration	10
Multi-company CRM	11
Transactions	12
Notes and attachments	13
Integrated search	13
Integrated data mining	13
Activities	14
Campaigns	14
Web map links	14
Mail server synchronisation	14
Pronto Sales App	16
Mobile access	16
Customer details	17
Product Information	17
Sales performance	18
Order creation	18
Order history	18
Pipeline management	18
Activities	18
Deal management	18
Sales engagement tracking	18

The extra mile

Make every customer interaction **count**

By putting the needs of your customers first, Pronto Xi's fully integrated Customer Relationship Management (CRM) modules help to drive customer acquisition, retention and satisfaction. With Pronto Xi CRM, you can analyse customer and prospect needs, identify the customers that require the most attention, and pinpoint the business processes that deliver superior customer service and promote repeat business.

You can track leads, opportunities, transactions and activities for all your accounts and contacts, providing you with detailed insights on every prospect and customer. With attributes, you can flexibly add powerful data points that can be used to identify and segment CRM data.

In turn, the data that you collect about your customers can be used to assist with Salesforce automation, customer service and support, and marketing opportunities.

Achieve all of this while reaping the benefits of an integrated solution that eliminates double-handling and enhances visibility and data integrity.

Pronto Sales App is the perfect companion when your sales team is on the road, offering seamless integration with Pronto Xi CRM. It provides tools for pre-sales, sales and account manager-related activities when they're needed most, as well as real-time information about product availability, sales orders, quotations and customer-specific pricing. You can even accept payments via the app, so you can close more deals on the move.

Pronto Xi CRM

Maintain and **strengthen** all your **customer relationships**, from new leads to long-term associations, with Pronto Xi CRM



Pronto Xi Customer Relationship Management (CRM) gives you the power to improve your operations and better communicate with customers, helping you to optimise revenue, profitability and customer satisfaction.

Analyse customer and prospect needs, and easily identify the customers that require the most attention. Discover which business processes work best to drive customer satisfaction and encourage repeat business.

Advantages of Pronto Xi CRM include:

- a single point of reference for CRM functions, helping you to manage a pipeline
- the ability to store and manage unlimited customers, prospects and companies

- tools to create, track and qualify leads, and convert to leads to opportunities
- the ability to easily access and analyse detailed sales information about your customers and prospects
- improved time management, with records of interactions and simple scheduling of sales activities, which can be synchronised with Microsoft Office, Microsoft 365 or Google Workspace
- the capacity to easily track marketing efforts, with dynamic updates of all activity and key information available at a glance
- the ability to centrally manage your customer data across all your group companies

Pipeline

Pronto Xi's Pipeline screen gives your sales team a central point to manage their accounts, contacts, leads and opportunities. Flexible visualisations allow you to view the CRM pipeline and track sales against budget, while data grid filters help you to prioritise your most urgent activities.

The Pipeline interface and user experience is identical on a phone or tablet, allowing you to easily access all your critical information while you're on the road.

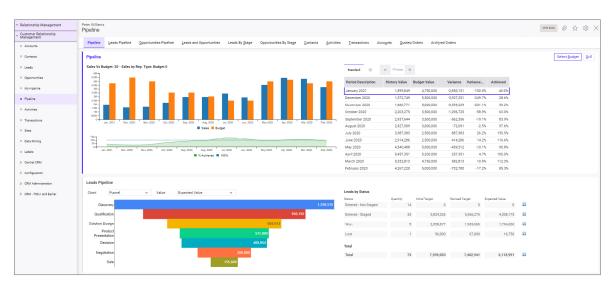
Performance metrics

The pre-configured Business Dashboard provides key performance metrics, empowering you to stay abreast of sales activities and helping to increase the visibility of customer relationship activities across your organisation. These include:

- number of leads and opportunities
- number and opportunity value of quotes in the pipeline
- value of leads by stage
- value of leads and opportunities by the top representatives in the business

Address book and contact manager

- Pronto Xi CRM centralises day-to-day customer management, giving you streamlined access all of Pronto Xi's customer-related functionality. The module's intuitive screen clearly displays vital customer information, including the date of the last sale, last mail-out and next action date.
- You can categorise and access information about an unlimited number of customers, prospects and companies. Features include:
- Organisations where the company is a current customer, Pronto Xi sales enquiries are available directly from the CRM's main screen, giving your team all the historical and status information they need, without having to access Accounts Receivable.
- Contacts you can store information such as email addresses, mobile phone numbers, home phone numbers and position descriptions for an unlimited number of individuals or contacts in each organisation.
- Security a number of security masks are built into the main screen to restrict customer modifications to authorised users.
- Parent/Child this links together multiple related companies to give you a view of holding companies or departments with multiple subsidiaries



View sales versus budget and the opportunity pipeline

×	PRONTO XI						Q	What are you looking f	or?	LB
P	v Relationship Management	Mr. Dinalina						CRM M095	0 ☆ ☆	×
0	Customer Relationship Management	My Pipeline							<i>е</i> и «	^
Ě	o Accounts	My Pipeline Leads Pipeline O	oportunities Pipeline Leads and Opportunities	Leads By Stage Opportuni	ties By Stage Contacts	Activities Transactions	Accounts	Quotes/Orders Arch	nived Orders	
	o Contacts	Accounts						Eind	Entry Deta	
	o Leads							7	2	
	o Opportunities	Standard 🛞 😑 15 rows	◊							
	My Pipeline	Account Name Index A	Full Address	Phone	Customer	Account Type	Region	Next Action	Last Change	1
	o Pipeline		2 Fog street Melbourne Victoria Australia 3123	+61 2 435099788		VIP Client	Victoria	12-AUG-2021	21-DEC-2021	1
	o ripeline	BOH HOTEL	8 Aldwell Street Melb Vic 3128		Boh Hotel	Hotel	Victoria	09-OCT-2020	22-DEC-2021	1
	o Activities		55 smith st Camberwell NSW Aus 2330		Donnelly Group	Donor	Victoria	12-AUG-2021	21-DEC-2021	1
	 Transactions 	OTWAY TRADING	123 Milk Street Birregurra Victoria 3242	03 5482 2698					22-DEC-2021	
	· · · · · · · · · · · · · · · · · · ·	THE MOUSE FACTORY	22 Andrews street Melbourne vic 3000	+61 3 12345678		Partner	Victoria	28-JUL-2021	14-JUL-2021	_
	o Sites	TRACING STOP PTY LTD	18 Sampson Street I lawthorn Victoria						22-DEC-2021	4
	o Data Mining									
	o Labels									
	▷ Central CRM									
	D Configuration									
	CRM Administration									- 1
		<								•
	CRM M095				First ∓ Pa	ige Up 全 Up ▲			Last 🚊 🛛 🗙	
	CKM MU95									

Display accounts and contacts on the screen

Attributes

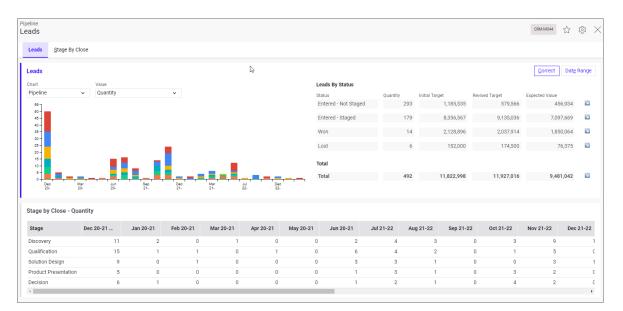
Attributes allow you to define and manage customer characteristics, and then use these characteristics to analyse your customer database to maximise sales opportunities.

For example, you could track the number of staff, sales turnover, competitors' details, customer interests, item groups or competitive advantages. Attribute groups can also be created for hierarchical management.

Any number of attributes can be assigned to each company or contact. Attributes can also store more than one value under a single attribute, making information such as user preferences – which often have more than one value – easier to retrieve.

Contact-specific attributes can be applied independently of company-level attributes. Attributes can be optional or mandatory, which ensures there is an automatic prompt for key information when a new account is created.

In multi-company environments, the creation and maintenance of attributes can be controlled by a central administrator, ensuring consistency and relevance when it comes to reporting.



Gain a clear understanding of your leads with integrated visualisations

Sales management

Leads

With CRM Lead Management, you can optimise the selling cycle to nurture relationships with prospects and turn leads into opportunities.

Multiple contacts from a company can be selectively associated with new leads. If the contact already exists in the database, duplicate entries can be removed or kept as separate entries, depending on your requirements.

Qualified leads can be selectively converted to opportunities, with all transactional history maintained.

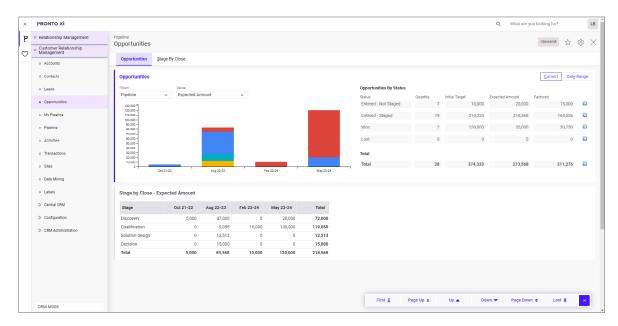
Opportunities

CRM Opportunity Management helps you track the position and quality of each opportunity, maximising the sales potential through clear views and quick access to information.

Specific contacts can be easily accessed from CRM accounts, and all transactional information and activity entries are searchable from a single interface.

In high-volume quoting environments, you can create greater control over the sales process by creating "opportunity quotations". This unique facility allows you to quarantine quotations inside an opportunity and selectively convert them to "live" quotations or sales orders. Expected revenue can be managed by applying probability factors.





Use integrated visulisations to view your opportunities



Pronto Xi integration

Having CRM integrated with the wider Pronto Xi ERP solution provides increased functionality and ensures there is always 'one source of the truth'. This means that when interacting with customers, staff can:

- View up-to-the-minute transactions and account notes
- View current sales orders including processing status, e.g. picking slip printed, order invoiced, etc.
- View and quote customer special pricing, quantity discounts or any other unique attributes
- View current inventory details and purchase order details including expected arrival dates
- Create a customer in CRM that writes a record in Accounts Receivable
- View the credit status or any special conditions maintained within Accounts Receivable
- Link to other functional aspects of Pronto Xi. For example, service-based organisations can link to service calls of account customers managed in CRM

Quotations and sales orders

If a customer requests a quotation, it can be entered against a company. If the quotation is accepted, it can be converted to a sales order and a basic (cash on delivery) customer account is automatically created in Accounts Receivable. Security restrictions may apply.

CRM quotations are integrated with quotations generated in other Pronto Xi modules. This allows you to copy quotation details entered for one company to another company, and to update the company transaction logs with the quotation number.

Quotations can also be linked to specific sales campaigns, while unaccepted (lost) quotations are recorded for analysis.

Customer and sales views

Pronto Xi CRM records detailed information about past, present and prospective customers, giving your representatives full access to sales and transactional history.

	"∎ × 🖉 ဂ ∩	Central CRM - Marketing	⊿" ∿ ≅ ≪ 众 💄 ?
	All tabs Currency Code	Year ··· Period Number ··· Week Number ···	Region ···· Territor, > ··· I This tab
★ ●	Summary Top Accounts Top Contacts Top Produ	ts Top Categories Top Departments Top Division	s Top Locations Average Item Prices 🗨
	Total Revenue Gross Profit Gross Profit	Revenue by Warehouse	Avg Order Value Vorders
alı –	6.47K 2.62K 409	/ Melbourne Brisbane	42.57 152
P P	Revenue vs Gross Profit	Y	History
Æ	Total Value Ex-Tax (Sum) Gross Profit (Calculated)		Measures group (3)
			\sim
		Adelaide Sydney	And
	4 ⁵¹ 4 ⁵⁸ 4 ⁵⁸		
20)		
+ 0		#	•

Get a snapshot of performance with the Central CRM Sales Dashboard

Multi-company CRM

In multi-company environments, Central CRM provides an accurate single view of your customers, with accounts and customer data seamlessly shared between your business entities.

Customer data automatically synchronises between companies. This avoids duplication and reduces time spent in manual data consolidation, and means customers do not need to repeat information if they are doing business with another company within your group.

Consolidated sales, leads and opportunities across the group – combined with centralised attributes – support consistency in reporting. Slicing and dicing of data can also be standardised, giving you a predictable way to gain insights.

	PRONTO Xİ			Q, What	t are you looking for?
	👻 Relationship Management	Sale Made			
	Customer Relationship	Transactions			
-	-	Search Detail Decemi Entry Dom New Transaction	×		
	0 Accounts	Transaction	and the second second		
	o Contacts	standard 👸 🚥 20 rows 🗢 Properties			
	- Loods	Action Date Type A Ward Hardware	ame	Campaign	Lead/Opportunity
o Accounts	Wald Haldwale	ante	Cumpugn	Loud opportunity	
	o Opportunities	17-MAY-2022 Sale Made W Type			
		12-MAY-2022 Discussion W C Call Received	×		
	o My Pipeline	05-MAY-2022 Sale Made A Transaction Date Time	ier		
P P P P P P P P P P P P P	21-FEB-2022 Sale Made Le 20-MAY-2022 🗄 09:29:07	Cheeseman			
		21-FEB-2022 Sale Made Le Action Date	Cheeseman		
P	o Activities	21-FFB-2022 Sale Made 1 e 20-MAY-2022	Theeseman		
	Transactions	21-FEB-2022 Sale Made Le Notes	Cheeseman		
		18-FEB-2022 Email Into Send Sr Description: A large opportunity			
	o Sites	18-FEB-2022 Quote Issued th Cost: \$10,000	on	MPower	sell sugar to this prospect
	 Data Mining 	18-FEB-2022 Email Info Send th Retailer: unknown			
		18-FEB-2022 Email Info Send VI			
	o Labels	10-FEB-2022 Sale Made Ba	Selvaratnam	MPower	
	Central CRM	10-FEB-2022 Sale Made Ba	Selvaratnam	holiday camp	aign
		09-FEB-2022 Sale Made W	mith		
P * Relationship Management * Customer Relationship Management * Customer Relationship * Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Customer Relationship • Sites • Data Mining • Labels • Custorer RM • Configuration • CRM Administration	08-FEB-2022 Sale Made W. Associations	mith			
	CRM Administration	08-FEB-2022 Sale Made W Sales Rep JM- Jarred Man	mith		
		08-FEB-2022 Sale Made W	mith		
		08-FEB-2022 Sale Made W	mith		
		08-FEB-2022 Sale Made W Hammers and Mallets (Opportunity)	~ mith		
		08-FEB-2022 Sale Made W	mith		
		¥	*		
		× × •			
	001414080		First 至 🛛 Pa	age Up 🕿 Up 🛦 Down 🔻 Pag	e Down ∓ Last <u>∓</u> ×

Record interactions with your customers and prospects

Transactions

Transaction manager

Pronto Xi CRM allows you to review and maintain daily transactions such as meetings, emails and calls.

Each transaction is recorded using both the representative code and the login name to enable an audit trail to be followed. The data grid displays the transaction date and time, campaign, transaction type, response type, action category, target date and actual date, allowing you to view exactly what happened at a given point in time.

Letters, emails and labels

Pronto Xi's Send Info option can be used to easily create a batch of personalised letters or labels. It utilises the mail merge facilities in word processing applications such as Microsoft Word.

You can create templates to enable direct merging from the CRM. You can also merge sales orders and quotation data into the templates.

Emails with attachments can be sent to multiple accounts and contacts.

When the Send Info function is used, transaction entries are written against the relevant CRM accounts.

Notes and attachments

Notes

With the Notes function, you can record notes by type against CRM accounts. Notes are searchable and can be filtered by type.

Attachments

Any kind of file can be attached to individual contacts or companies in the CRM.

You can directly access images and documents that are related to the selected customer or prospect from within the CRM.

Integrated search

Locating accounts, contacts and information via a keyword search – or, for example, phone numbers – is simple. Critical information can be obtained in just a few keystrokes, giving sales representatives or telephone operators fast access to an account's details.

The Search function can be configured to be open by default when you navigate to CRM screens.

If a single direct match is not found, Pronto Xi lists all accounts that match the input criteria. You can then select the appropriate account from the suggested list.

Integrated data mining

Pronto Xi's integrated data mining tool enables you to discover meaningful correlations, patterns and trends in large amounts of data.

Information about your prospects and customers can then be filtered using various selection criteria to produce reports and mailing lists.

A range of attributes can form part of the selection criteria and can be combined into complex logical expressions. Each list can also be refined using the Keep/Drop option to apply further selection criteria.



Activities

The CRM Activity Scheduler is a simple way to organise all your activities, including booking appointments, call-outs, meetings and more.

You can design activities to suit your business's needs. Activities can be recurring or managed in bulk, making it easy to move activities from one sales representative to another, or assign a group activity to all representatives.

Pronto Xi's mail server integration also gives you the option to synchronise your activities to an external calendar.

Campaigns

You can use the CRM Campaign functionality to manage and track campaigns or events, and to track the performance of each representative.

Sales transactions, quotations, correspondence and activities can be linked to any number of campaigns. Pronto Xi CRM stores the campaign statistics, enabling you to measure campaign success against the budgeted cost and expected revenue.

Web map links

Pronto Xi CRM has the ability to link to webbased map technology. By clicking the relevant map link on the CRM screen, a map or driving directions can be obtained quickly and easily from servers such as Google Maps

Mail server synchronisation

Synchronise your CRM data with cloud-based business applications such as Microsoft Office or Google Workspace.

By doing so, you can improve productivity, promote data capture and increase the acceptance of CRM in your organisation.

Daily communications, contact details, tasks and calendar events are automatically synchronised between Pronto Xi CRM and your mail server, decreasing overheads and ensuring that relevant information is always accessible to those who need it.

The synchronisation helps to ensure that information is consistent across your enterprise, and boosts user adoption through the use of familiar interfaces.

It also supports:

- entering or managing contact information between systems
- sending out and recording emails for future reference
- creating new or updated tasks
- entering or updating activities
- calendar events
- exporting data to spreadsheets
- automated updating
- improved reporting capabilities

×	ргонто хі									Q What a	are you looking	for?	LB
•	v Relationship Management	Activities									CRM M	1024 @ ☆	r ×
\heartsuit	Management Accounts	Search Detail Recent E	ntry <u>C</u> orrect										
	o Contacts	Standard Today's Activities	⇒ 20 rows Φ										
	o Leads	Account	Subject	Туре	Contact	Action Date	Action Time	Status	End Date	End Time	Reminder	Reminder D	Rep
	o Opportunities	Indoor Plants PTY LTD.	call Ivy	Book Appointment	Ivy Branch	03-FEB-2022	00:00	Finished	03-FEB-2022	00:00	No	03-FEB-2022	Jeff
		The Skylight Company	Call Mike	Make Call	Michael Someswere	02-FEB-2022	10:00	Finished	02-FEB-2022	11:30	No	02-FEB-2022	Jeff
	 My Pipeline 	Citrus	meet with mel	Email Inserted Calen	Melania Bidel	02-FEB-2022	08:30	Entered	02-FEB-2022	08:30	No	02-FEB-2022	Jeff
	o Pipeline	The Skylight Company	make another appointment	Rook Appointment	Samantha Foxhead	02-FFB-2022	00:00	Finished	02-FFR-2022	00:00	No	02-FFB-2022	Jeff
		Durmen	Meet with the boss	Email Inserted Calen	Simon Anderjohn	01 FEB 2022	08:00	Entered	01 FEB 2022	09:00	Ycs	01 FEB 2022	Jeff
	Activities	Ebony White	Followup Quote	Follow Up	Ebony White	26-AUG-2021	08:00	Entered	26-AUG-2021	08:30	Yes	26-AUG-2021	Mary
	o Transactions	Geethma's yummy treats	Call this dude	Make Call	Ignatius Sampson	23-AUG-2021	00:00	Entered	23-AUG-2021	00:30	Yes	23-AUG-2021	Geet
		Barney Smith	Meeting of demo	Book Appointment	Rubini Selvaratnam	23-AUG-2021	00:00	Entered	23-AUG-2021	00:00	Yes	23-AUG-2021	Test
	o Sites	Colpan	Test Trans	Book Appointment	Max Maxx	19-AUG-2021	00:00	Finished	19-AUG-2021	00:00	Yes	19-AUG-2021	Ron
	o Data Mining	Adelaide Fruit Shop	New Activity	Book Appointment	Greg Smith	18-AUG-2021	00:00	Entered	18-AUG-2021	00:00	Yes	18-AUG-2021	Hesh
		Jack Be Nimble Enterprises	Call Jack RE holiday	Make Call	Jack Horner	13-AUG-2021	09:30	Entered	13-AUG-2021	09:45	Yes	13-AUG-2021	Leon
	 Labels 	Rhodamine	Make a call to Nicholas cage	Make Call	Nicholas Cage	13-AUG-2021	00:80	Entered	13-AUG-2021	08:30	Yes	13-AUG-2021	andr
	Central CRM	Max Deli	Meeting Request	Follow Up	Michael Matthews	12-AUG-2021	14:00	Entered	12-AUG-2021	14:30	Yes	11-AUG-2021	Andr
		Otway Dairy	Call Jacinta Back from Otwa	Make Call	Jacinta Stone	12-AUG-2021	09:00	Entered	12-AUG-2021	10:00	Yes	12-AUG-2021	Jacir
	Configuration	Waynes Crazy Deals	warp	Make Call	Anthony Fields	12-AUG-2021	08:00	Entered	12-AUG-2021	08:30	Yes	12-AUG-2021	Wayr
	CRM Administration	Acme Wholesale	Call this client re standard or	Make Call	John James	12-AUG-2021	08:00	Entered	12-AUG-2021	08:30	Yes	12-AUG-2021	Coop
		Les Smith	Cheese and more cheese	Follow Up	Cheesy Cheese	12-AUG-2021	00:00	Entered	12-AUG-2021	08:30	Yes	12-AUG-2021	Smit

View all your upcoming activities, or filter activities to show urgent or due tasks



Pronto Sales App

Always open, always closing

A good business relationship is based on **open communication and responsiveness**.

Pronto Sales App gives your staff the information they need while they're on the road, making it an essential business tool

Pronto Sales App is the ultimate companion for sales professionals on the move. Innovative and intuitive, it is accessed via a responsive web-based portal, making it easy to deploy and use.

Seamlessly integrated with Pronto Xi CRM, Pronto Sales App offers a complete customer profile view. Representatives can access sites, contacts, transactions and client attributes, and maintain scheduled and ad hoc activities while they're on the road. The system's powerful features help to improve your deal responsiveness and, by empowering your representatives to negotiate on price, ensure your sales teams stand out from the pack with quality customer service.

Through its advanced business-to-business capabilities, Pronto Sales App makes it easy to enter sales orders or quotations that adhere to business standards and controls such as credit limits, product restrictions and customerspecific pricing.

Representatives can apply their own company-approved price overrides to get a deal over the line. They can also review outstanding orders and balances, helping to deliver a well-rounded and informed service to their clients. Pronto Sales App supports shopping cart and payment gateway features, allowing your representatives to process sales and take payment on the spot. Representatives can link their in-progress sales orders to deals in their pipeline, arming them with the information they need to meet their sales objectives. They also have access to dashboards that give them a quick understanding of their top clients, products and prior sales, making it easier for them to track their progress.

Mobile access

With a mobile-first responsive design, Pronto Sales App provides all the functionality of a sales CRM on a smartphone, ensuring your representatives can manage everything on the go.

Details about their activities, contacts, accounts and deals are just a tap away, meaning they can stay up-to-date on their deal before they step into a sales call. Then, after their meeting, they can schedule followup activities and update details as they walk into their next appointment..

	Sam Walko ales Rep	er				
Top 5 Acc	counts YTD		Overdue	Activities		
			DATE	TASK	ACCOUNT	
7	_		13/02/19	Client Introduction	Red leaf Brewery Pty Ltd	
3		 Razor's Mountain Bikes Fresh Eats 	25/01/19	Present Quote	Stationary Kingdom Ltd	
1		Paws Palace Winder Fine Time Pieces	10/12/18	On-site Visit	Evergreen office Sultions Pty	
0.5		Evergreen Office Solutions	06/12/18	Follow up Call	Steps Dance Supplies Pty Ltd	
0			02/12/18	Product Pitch	Fresh Eats Pty Ltd	
Last 5 Sa	ales		m MD	1g Products 35JFD dern desk lamp- black	g	644
		 Paws Palace Margo Mango's Shop Evergreen Office Solutions 		270VJ Ih back office chair- Orange		400
		 Winder Fine Time Pieces Puzzle Complexium 		BBAGT Iderable Office Desk-White	\$1	6,00
				rawer Filling Cabinet-White	s	350
Recent	Transactions		Top 10 ⋿	pired opportunities		
		ACCOUNT			ACCOUNT	
Recent DATE 13/04/19	Transactions TRANSACTION Rep to Visit	ACCOUNT Paws Palace Pty Ltd 📀	Top 10 E> DATE 12/03/19	pired opportunities opp nume Interest to buy new offering	ACCOUNT Puzzle Complexium Pty Ltd	
DATE	TRANSACTION		DATE	OPP NAME		
DATE 13/04/19	TRANSACTION Rep to Visit	Paws Palace Pty Ltd 💿	DATE 12/03/19	OPP NAME Interest to buy new offering	Puzzle Complexium Pty Ltd	
DATE 13/04/19 09/04/19	TRANSACTION Rep to Visit EDM sent out	Paws Palace Pty Ltd Red Leaf Brewery Redholding	DATE 12/03/19 08/02/19	OPP NAME Interest to buy new offering Meet with Client for demo	Puzzle Complexium Pty Ltd Sassy Shoes Pty	

Review sales activity at a glance with the Sales Rep dashboard

Customer details

Effective deal management starts with knowing your customers. With Pronto Sales App, your representatives can capture personal details and conversations with contacts or accounts who are interested in your products, and create deals that can be tracked meticulously in their pipeline.

They can also use the Timeline View to see customer details and scheduled activities or appointments, then use this data to fill their pipeline and increase conversions.

Product Information

A large product range can create challenges – it can be difficult for representatives to know which products are suitable for their clients, while business silos mean it can be difficult to manage inventory information.

With real-time inventory synchronisation via Pronto Xi, including stock levels and pricing, Pronto Sales App gives your representatives access to key promotional, technical and marketing information in a timely manner. Intuitive product search tools make it easy to find relevant details, so representatives are able to provide your customers with up-to-date product information. As a result, customer interactions are consistent at every touchpoint with the business.

Sales performance

Get a clear overview of your organisation's sales performance by visiting the Dashboard. Analyse your best customers, products, representatives and activities, as well as recent sales and other critical data – all in one place. With multiple reports on a single screen, you can gain valuable insights and chart progress towards your goals.

Order creation

Pronto Sales App incorporates tools that allow your representatives to quickly create orders based on item codes, rather than keying in search terms – giving them more time to create relationships.

To make regular customers' orders easier to handle, representatives can even create clientor task-specific template orders, which they can either order as templated, or adjust the quantities as needed.

Order history

With full visibility into a customer's order history, your representatives can facilitate better conversations that lead to repeat purchases, as well as gain insights into fluctuations in order quantities.

With account aging information readily available, your representatives can ensure that have oversight of customers' unpaid invoices or unused credits.

Pipeline management

Pronto Sales App allows you to manage all your deals one view, giving you total visibility into your pipeline.

Drag and drop your leads or opportunities between different stages of the sales funnel, and use the insights you gain to improve your strategic decision-making and the quality of your engagements.

By providing a clear visual of the current status of deals and next steps, the pipeline helps to focus your representatives' efforts. By acting as a starting point, it keeps their actions organised and in line with your business objectives.

Activities

Representatives can schedule activities and attach them to deals in their pipeline, allowing them to see their entire to-do list on one easyto-navigate page.

Activities can also be assigned to either a contact or an account based on your business preferences, meaning representatives will never miss a follow-up task.

Deal management

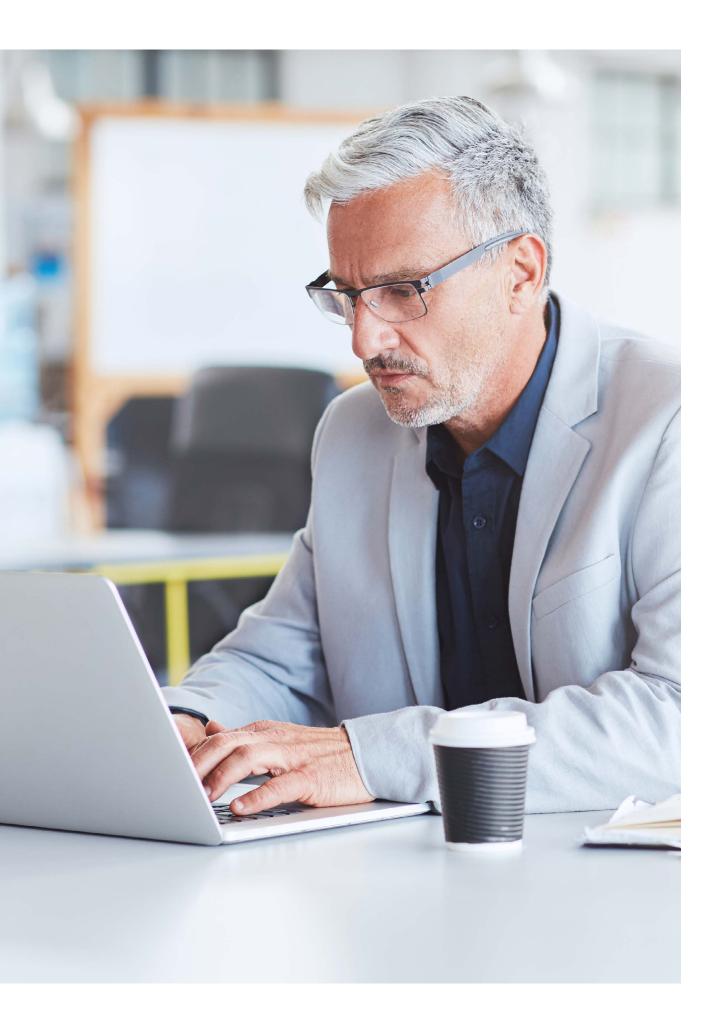
Contacts and product information can be added directly to opportunities to create one informative view of a deal.

Sales team members can also quickly assess the health of a pipeline and apply filters to access in-depth pipeline analysis, helping them stay on top of sales performance.

Sales engagement tracking

Pronto Sales App's Timeline View displays sales activity chronologically. It enables staff to better evaluate a situation and make smarter decisions, helping to increase their productivity.

The detailed visual representation provides a snapshot of how engaged prospects and customers are during a sales process. It shows accounts, contacts, leads and opportunities, and displays a run-down of all touchpoints. Representatives can also instantly record all their information –including their notes, activities and transactions – in one single stream.







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.

info@pronto.net 1300 PRONTO (1300 77 66 86)



pronto.net



Pronto-Software ProntoSoftware