PRONTO Xi

Applications Overview

CRM

The extra mile

Trademarks

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CRM Contents

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

Take the lead

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.

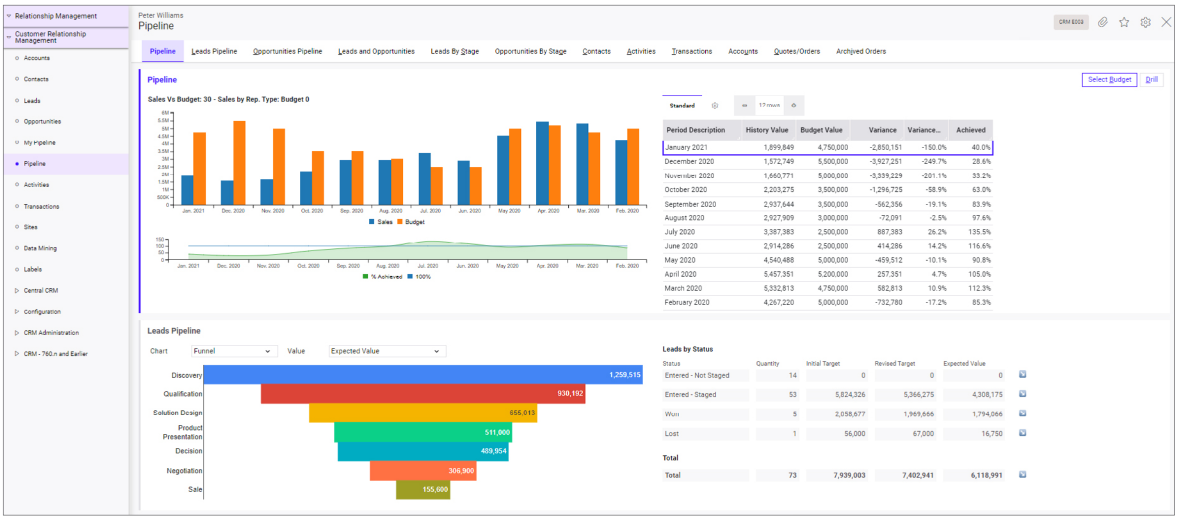
Performance metrics

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:

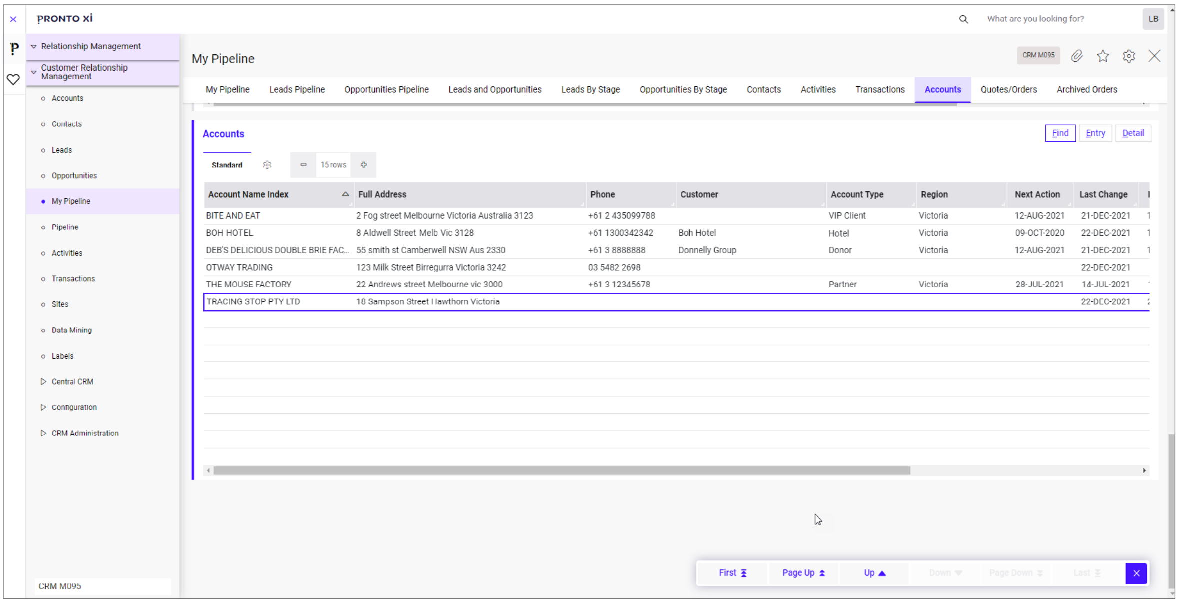
- number of leads and opportunities
- number and opportunity value of quotes in the pipeline
- value of leads by stage
- value of leads and opportunities by the top representatives in the business

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



Display accounts and contacts on the screen

Attributes

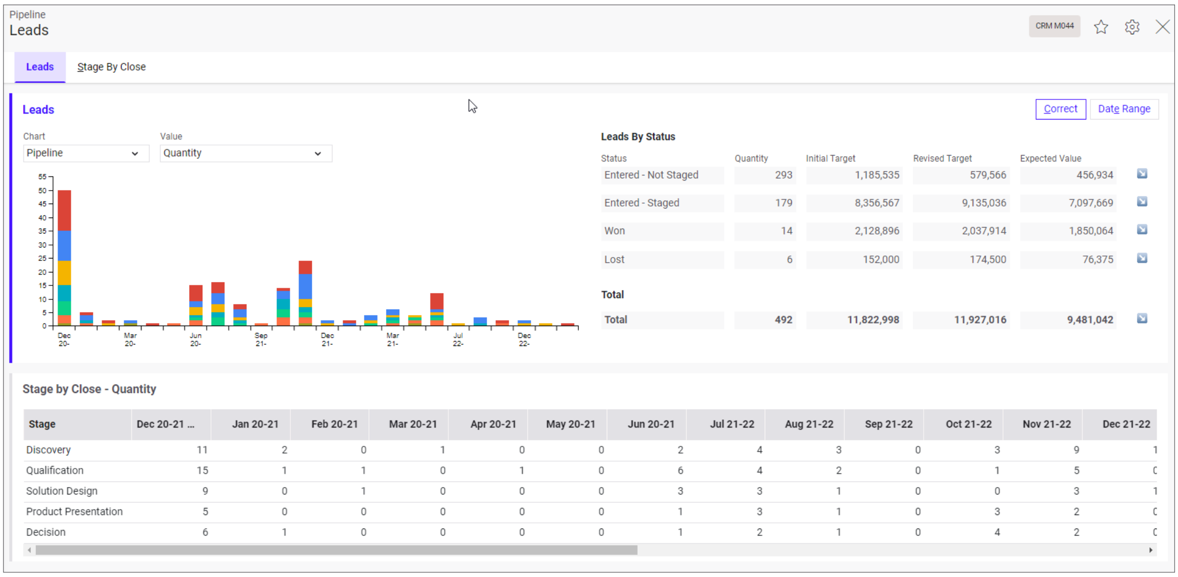
Attributes allow you to define and manage customer characteristics, and then use these characteristics to analyse your customer database to maximise sales opportunities.

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.

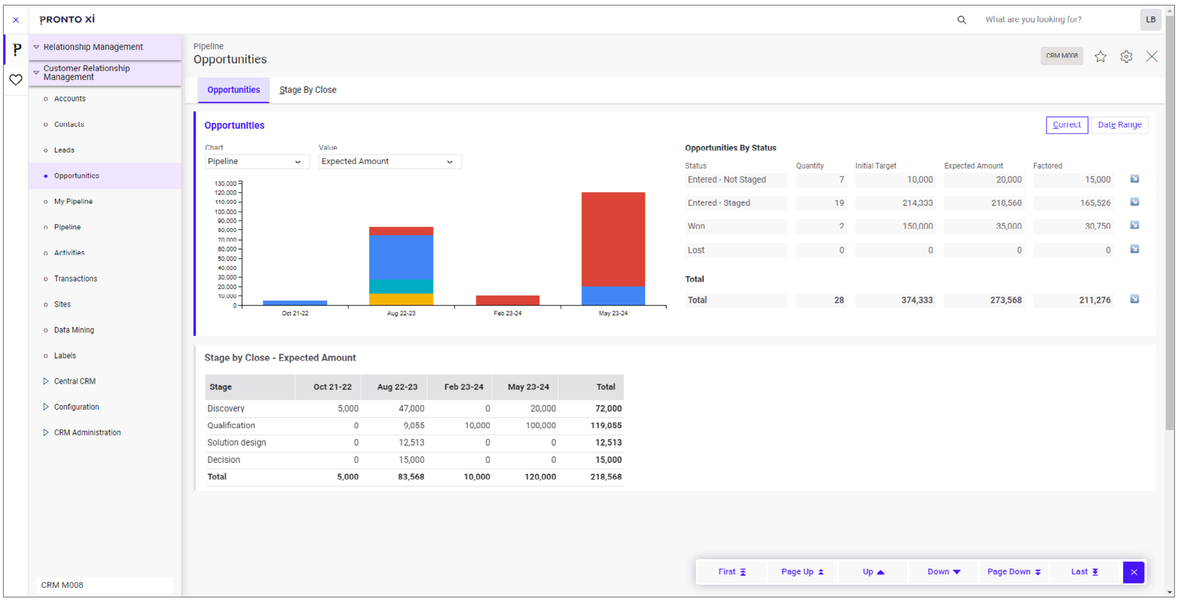
Qualified leads can be selectively converted to opportunities, with all transactional history maintained.

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

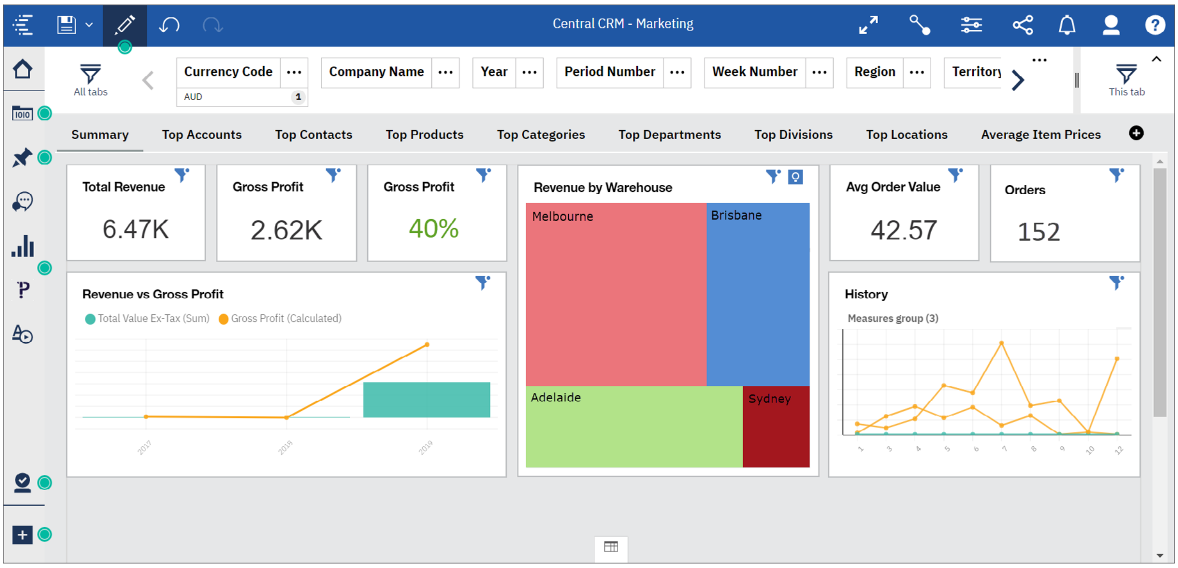
If a customer requests a quotation, it can be entered against a company. If the quotation is accepted, it can be converted to a sales order and a basic (cash on delivery) customer account is automatically created in Accounts Receivable. Security restrictions may apply.

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.



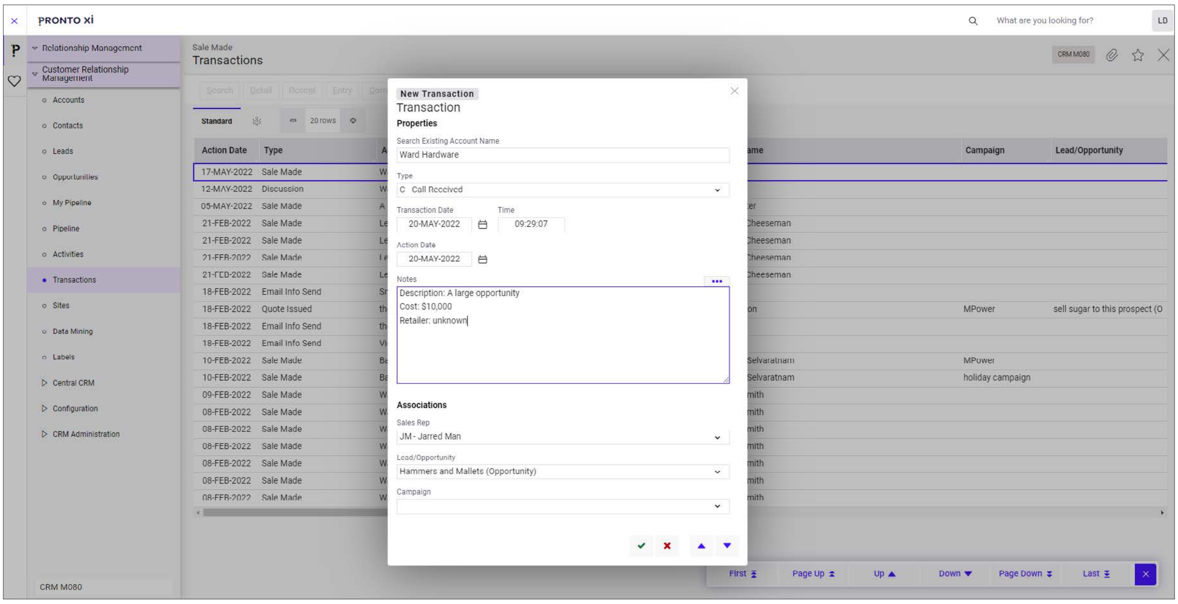
Get a snapshot of performance with the Central CRM Sales Dashboard

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.



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.

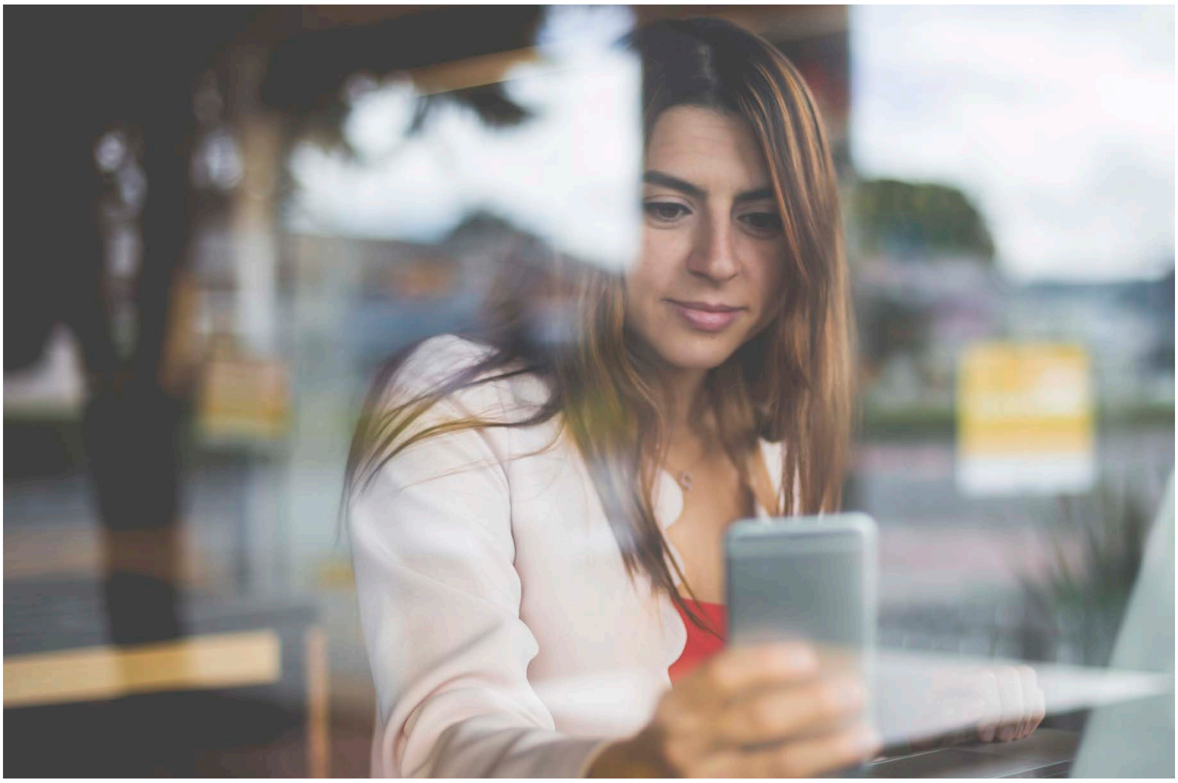
If a single direct match is not found, Pronto Xi lists all accounts that match the input criteria. You can then select the appropriate account from the suggested list.

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 web-based 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.

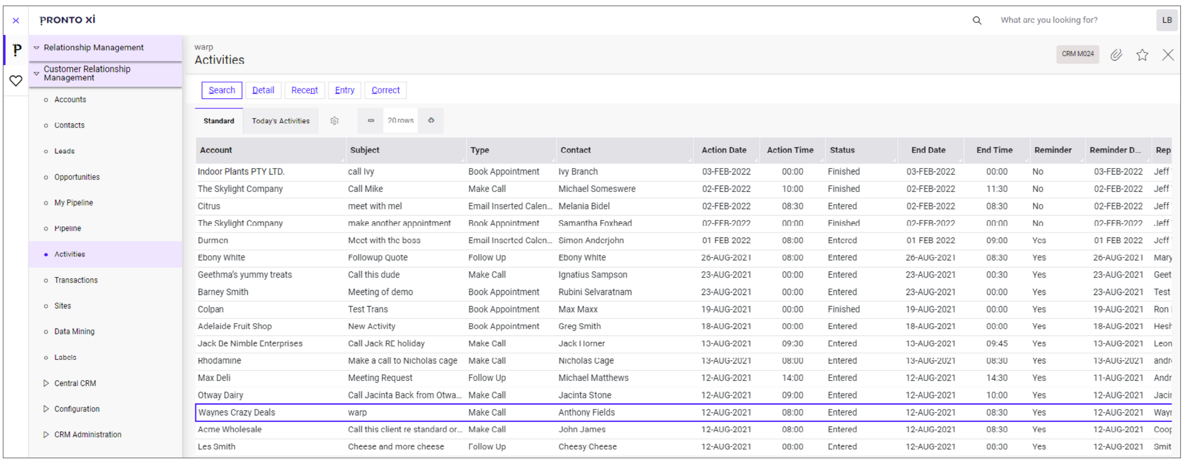
By doing so, you can improve productivity, promote data capture and increase the acceptance of CRM in your organisation.

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



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 customer-specific pricing.

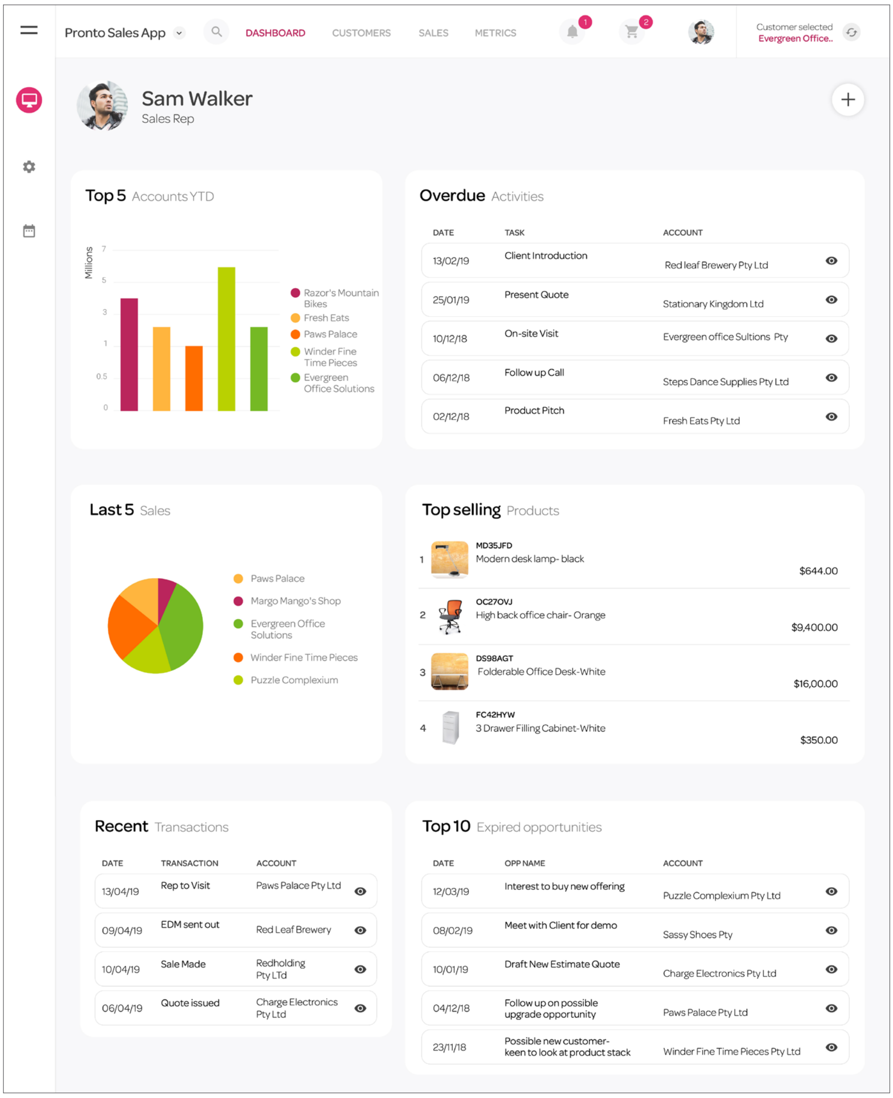
Representatives can apply their own company-approved price overrides to get a deal over the line. They can also review outstanding orders and balances, helping to deliver a well-rounded and informed service to their clients. Pronto Sales App supports shopping cart and payment gateway features, allowing 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 follow-up activities and update details as they walk into their next appointment..



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 client- or 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 easy-to-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.

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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