PRONTO Xi

Applications Overview

CRM

The extra mile

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 760 service pack or future release of Pronto Xi.

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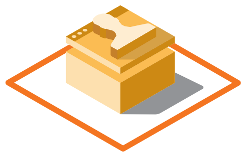

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The extra mile

Go out of your way to know your customers well.

By putting the needs of your customers first, the fully integrated CRM modules support your initiatives towards 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 recognise the business processes that deliver superior customer service and promote repeat business. All the data that you collect about your customers can be used to assist sales force automation, customer service and support, and marketing opportunities.

You can track leads, opportunities, transactions and activities for all your accounts and contacts – giving you 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. You can achieve all of this while reaping the benefits of an integrated solution, eliminating double-handling and enhancing visibility and data integrity.

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

Pronto Xi CRM

Maintain and strengthen all of your customer relationships from new leads to long-term relationships.

Take the lead

With Pronto Xi CRM (Customer Relationship Management) you will be able to optimise revenue, profitability and customer satisfaction through improved management of operations and better communication with customers.

Analyse customer and prospect needs, as well as easily identifying customers requiring the most attention. Discover which business processes work best to drive customer satisfaction and repeat business.

Advantages of Pronto Xi CRM include:

- A single point of reference for CRM functions, useful for sales representatives managing a pipeline
- Store and manage unlimited customers, prospects and companies
- Create, track and qualify leads, convert leads to opportunities
- Easily access and analyse detailed sales information about your customers and prospects
- Improved time management, with records of interactions and simple scheduling of day-to-day and follow-up sales activities, which can be synchronised with Microsoft Outlook
- Easily track marketing efforts, with all activity updated dynamically and key information available at a glance
- Centrally manage your customer data across all your group companies

CRM Console

The CRM Console combines all key CRM information into one central point. Designed for sales representatives, the CRM Console offers Account, Contact, Lead and Opportunity views, as well as a snapshot screen with a single view of key activities and the sales pipeline.

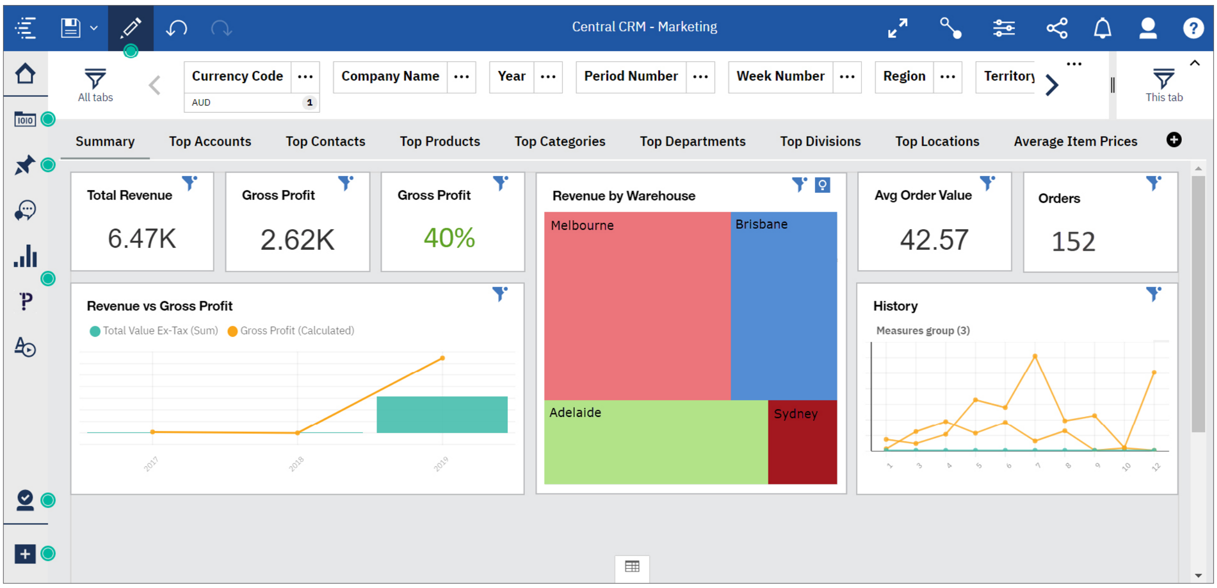
User-definable views and key search capabilities allow you to quickly and easily locate the information you require in a succinctly presented, graphically rich format.

Transactional information (such as incoming calls, information sent, etc.) can be accessed at high speed in real-time to furnish your organisation with the most up-to-date and relevant customer information possible.

CRM Business Dashboard

To enhance the visibility of CRM across your enterprise, a pre-configured Business Dashboard provides key performance metrics empowering you to stay abreast of sales activities. 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
- See consolidated sales and pipeline information across multiple companies
- View sales segmented by time of sale across different timezones.



Get a consolidated view of all customers across all businesses

Centralised CRM

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

Your customer data synchronises automatically between companies — reducing time wasted in manual data consolidation and avoids duplication. Customers are not forced to provide the same information when doing business with another company within your group.

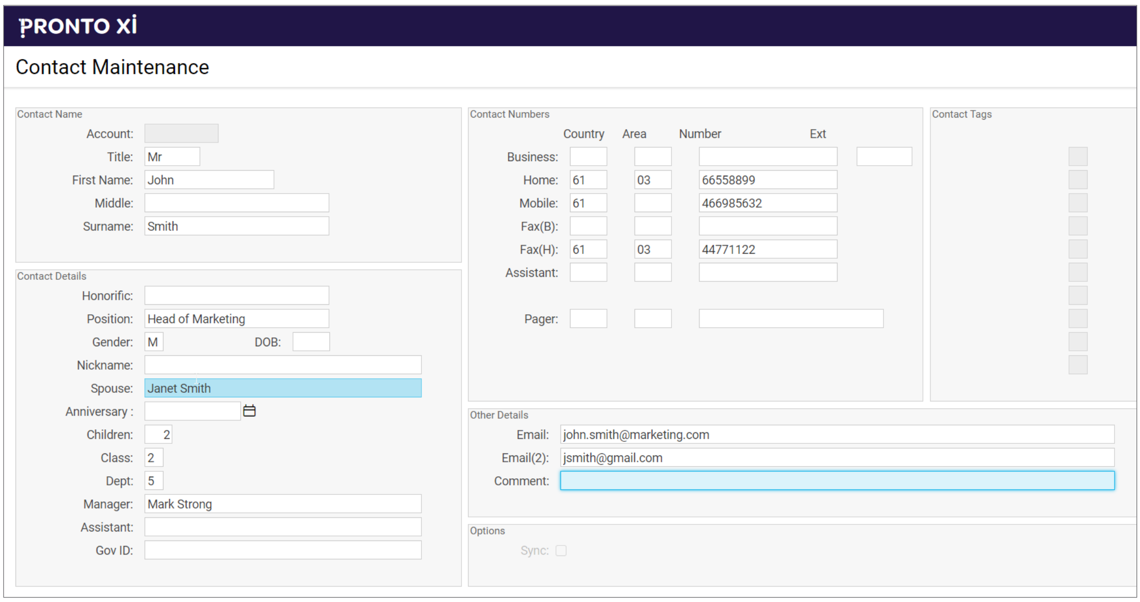
Consolidated sales, leads and opportunities across the group, combined with centralised attributes support a consistent way to report as well as slice and dice data, giving you a predictable way to gain insights.

Address book and contact manager

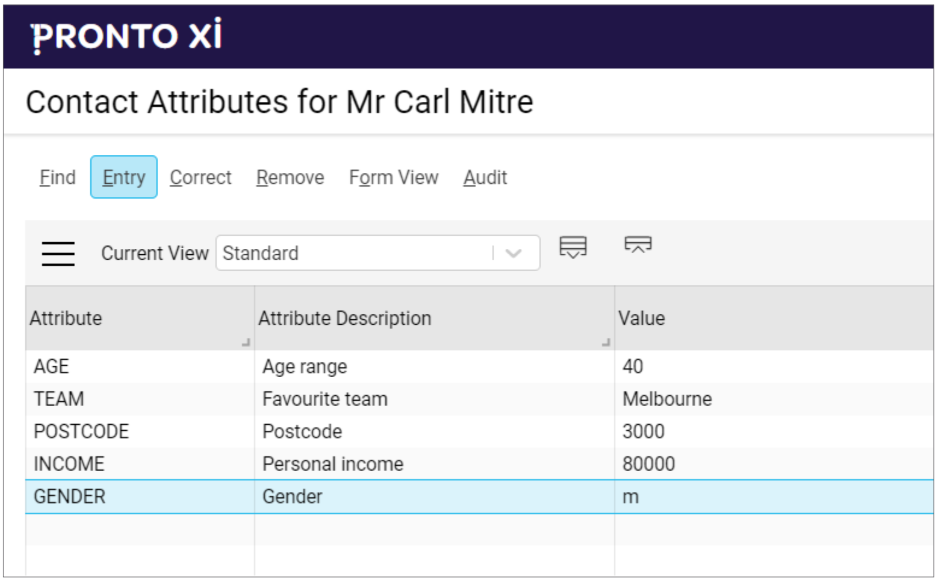
Day-to-day customer management is centralised, so you are able to access all the customer-related functionality of Pronto Xi from the module's intuitive screen. Vital customer information, including statistical information such as the date of the last sale, last mail-out and next action date, is clearly displayed.

Information about an unlimited number of customers, prospects and companies can be categorised and accessed according to:

- Organisations — Where the company is a current customer, the usual Pronto Xi sales enquiries are available directly from the main screen, giving sales representatives or customer service personnel all the historical and status information they need directly, without having to access Pronto Xi Accounts Receivable
- Contacts — Stores details such as email address, mobile phone number, home phone number and position description for an unlimited number of individuals or contacts for each unique organisation.
- Security — A number of security masks are built into the main screen to restrict customer modification to authorised users
- Multiple accounts — Links together multiple related companies to give you a view of holding companies or departments with multiple subsidiaries



Enter or update all details of a contact



Attribute	Attribute Description	Value
AGE	Age range	40
TEAM	Favourite team	Melbourne
POSTCODE	Postcode	3000
INCOME	Personal income	80000
GENDER	Gender	m

See all CRM attributes that are applied to an account or contact

Attributes

These are the customer and prospect characteristics that your organisation wishes to store, manage and data mine. For example, the number of staff, sales turnover, competitors' details, customer interests, item groups, competitive advantages, or a simple Christmas card mail indicator. Attribute groups can also be created for hierarchical management.

Any number of attributes can be assigned to each company, providing the basis for segmenting your database and data mining. Attributes can store more than one value under a single attribute. This means that information like user preferences, which often have more than one value, is easier to retrieve.

Contact-specific attributes can be applied independently of company-level attributes. Attributes can be optional or mandatory, making sure the information you wish to capture is automatically prompted for 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.

Sales management

Leads

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

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

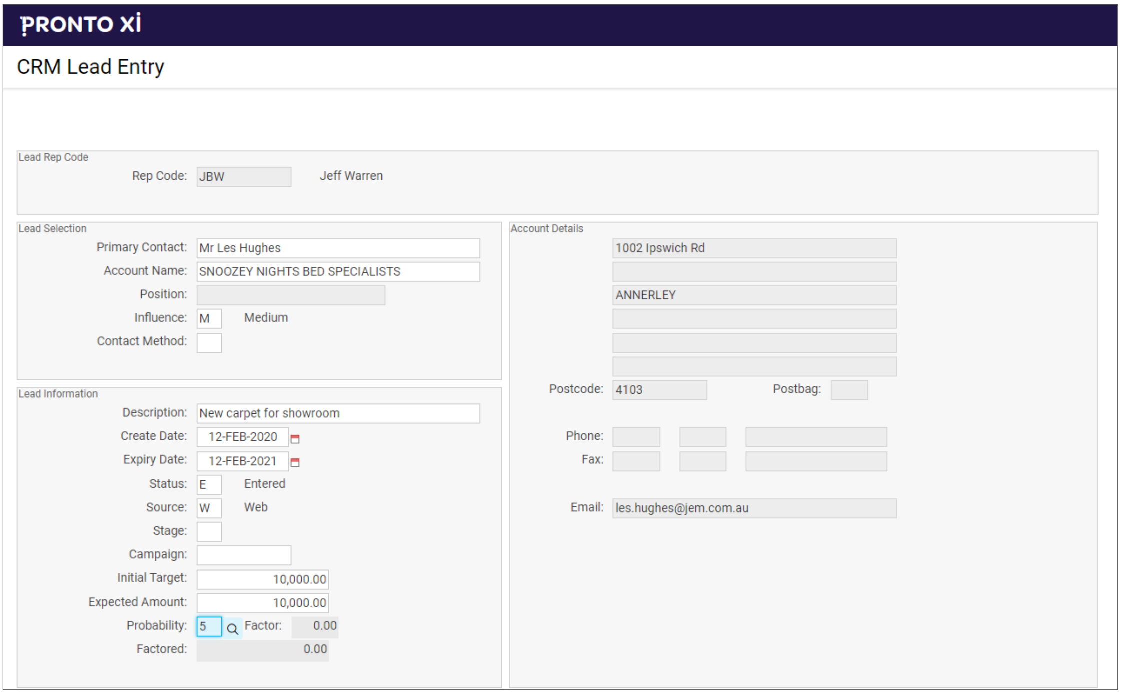
Qualified leads can be selectively converted to opportunities, with all transactional history maintained.

Opportunities

The opportunity management function of CRM helps your sales teams track the position and quality of each opportunity. This maximises their sales potential through clear views and quick access to information.

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

By creating 'opportunity quotations', there is a unique facility to quarantine quotations inside an opportunity and selectively convert them to 'live' quotations or sales orders. For high-volume quoting environments, this feature offers greater control over the sales process. Expected revenue can be managed by applying probability factors.



Create or update leads or opportunities for an account

ERP 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 Pronto Xi Accounts Receivable
- View the credit status or any special conditions maintained within Pronto Xi 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. When accepted, a quotation can be converted to a sales order and a basic (COD only) customer account is automatically created in Pronto Xi Accounts Receivable (security restrictions may apply).

CRM quotations are integrated with those generated in other Pronto Xi modules. This allows the copying of quotation details entered for one company to another company, with the company transaction logs updated 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

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

Data synchronisation

Improved productivity

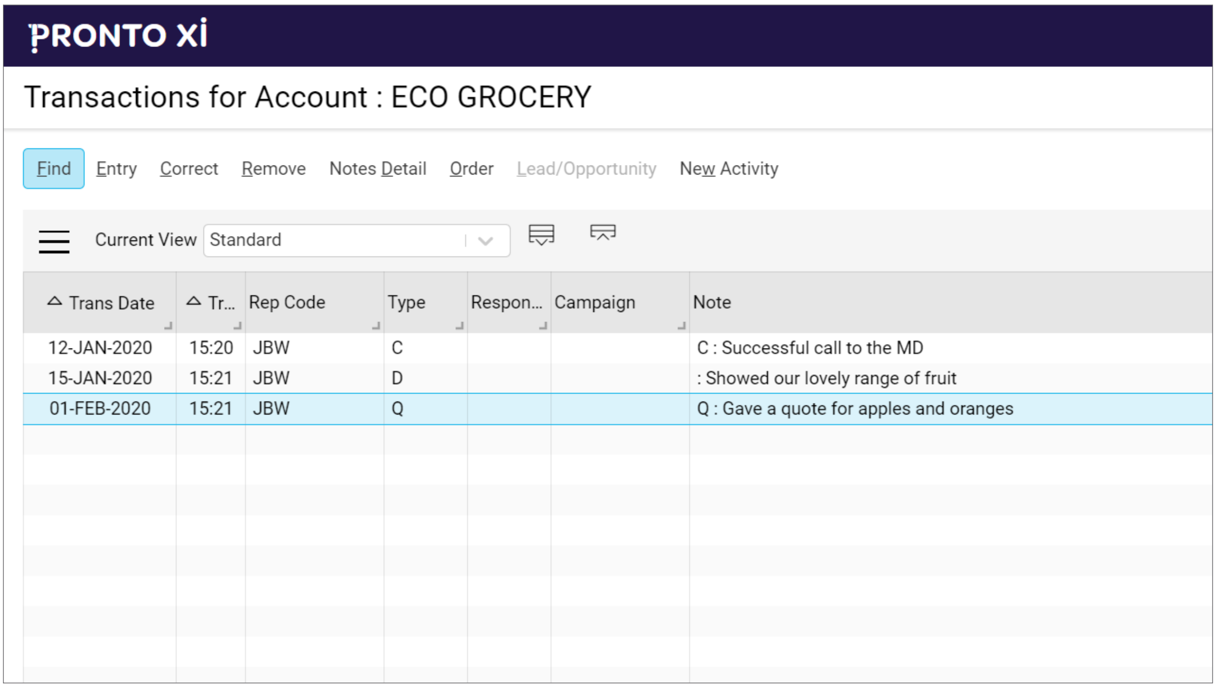
You can seamlessly synchronise your CRM data with Microsoft Outlook, Microsoft Exchange server, Office 365 and Google Apps for Work.

The exchange of information and activities improves the productivity of users, promotes data capture and increases the acceptance of CRM in your organisation.

Daily communication, contact details, tasks and calendar events are automatically synchronised between CRM and Outlook, decreasing overheads and ensuring that relevant information is always accessible to those who need it.

To enhance the user experience, the synchronisation supports:

- entering or managing contact information between systems
- sending out and recording emails for future reference
- creating new or updated tasks
- activity management via entering or updating
- calendar events
- export data to spreadsheet
- email using Outlook.com and Gmail.com
- automated updating without operator intervention
- standardised information across the enterprise
- user adoption through familiar interfaces
- improved and expanded reporting capabilities



View all transactions of a CRM account

Transactions

Transaction manager

All daily transactions can be reviewed and maintained. Each transaction is recorded by 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 the user to view exactly what happened at a given point in time.

Send Info/Mail Merge

The Send Info option is used to create letters and/or print labels by utilising the mail merge facilities in word processing applications such as Microsoft Word. Templates can be created to enable direct merging from CRM. You can also merge sales orders and quotation data into these 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, users 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. There is direct access from within CRM to images and documents that are related to the selected customer or prospect.

Integrated search

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

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

There is also an advanced search capability, including user-defined time-outs and result quantities, helpful where large volumes of data are involved.

Integrated data mining

An integrated data mining tool enables you to discover meaningful correlations, patterns and trends in what may be large amounts of data. Information about your prospects and customers can be filtered using various selection criteria to produce reports and mailing lists.

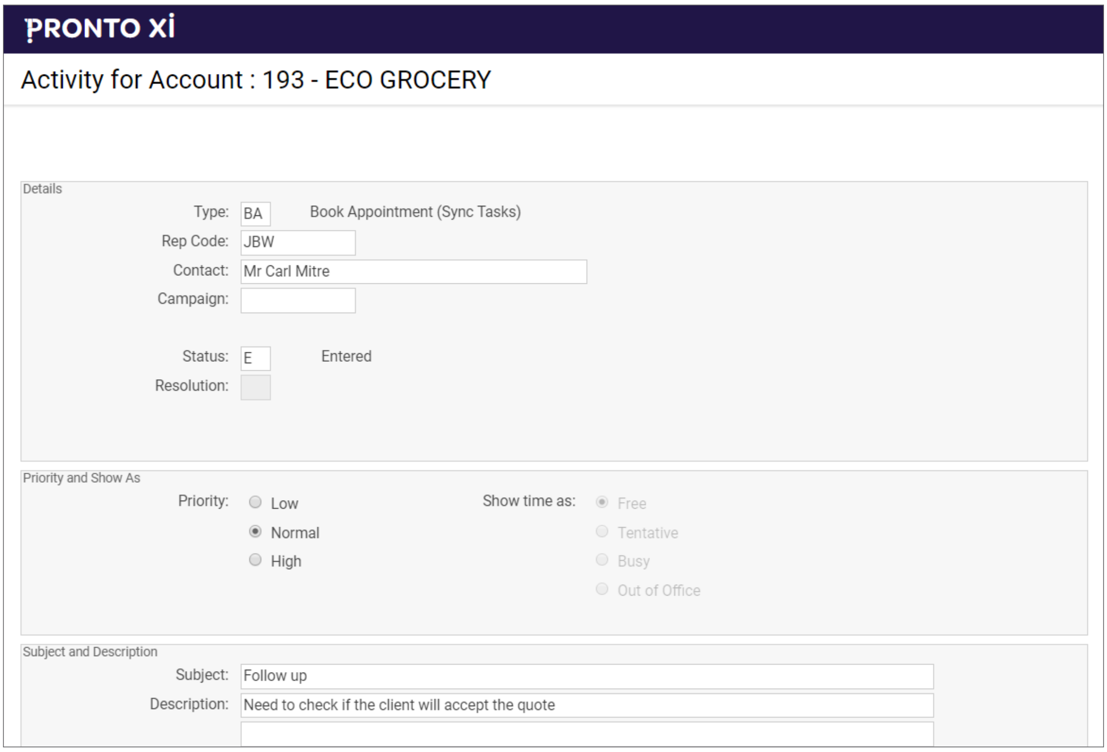
A range of attributes can form part of the selection criteria and can be combined into complex logical expressions. Each list can also be refined using the Keep/Drop option to apply further selection criteria and various reports can be generated, including mailing labels and mail-merge lists.

Activities

The CRM Activity Scheduler is a simple way to organise all your activities, including the booking of appointments, callouts, meetings and more.

You can design the activity scheduler to suit your business's needs. Integration with Microsoft Outlook gives the option to synchronise your activities to your Outlook calendar or the calendar of the nominated sales representative.

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.



Log rep activity with description, notes and a date

Campaigns

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

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

Web map links

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

Pronto Sales App

A good business relationship is based on open communication and ready responsiveness. Equipping your staff while they are on the road with a sales application that provides easy access to customer intelligence, real time product and Customer Relationship Management (CRM) data is then essential.

Always open, always closing

Pronto Sales App is the ultimate companion for sales professionals on the move. With seamless integration to Pronto Xi CRM, it offers a complete customer profile view with access to sites, contacts, transactions, client attributes and the ability to maintain scheduled and ad hoc activities on the road. The system's powerful features help to improve your deal responsiveness and empowers your representatives to engage in price negotiation so that your sale teams stand out from the pack with quality customer service.

Through its advanced business-to-business capability, it is easy to enter sales orders or quotations that adhere to business standards and controls such as credit limits, product restrictions and customer specific pricing. Sales professionals can apply their own company approved price overrides to get a deal over the line as well as review outstanding orders and balances to deliver a well-rounded and more informed service to their clients.

Pronto Sales App also allows your representatives to process sales and take payment for any deals they have on the spot by supporting full shopping cart and payment gateway features. Representatives can link their in-progress sales orders to deals in their pipeline as well, to arm them with all the information they need to make informed decisions towards meeting their sales objectives. Representatives also have access to dashboards to make it easier to track their progress by gaining a quick understanding of their top clients, products and prior sales.

Pronto Sales App is an innovative, intuitive solution that is accessed via a responsive web-based portal, making it easy to deploy and use.

Work from anywhere

With a mobile-first responsive design sales representatives can have all the functionalities of a sales CRM at their fingertips on their smartphone and can manage everything on the go. All the details they need to know about their activities, contacts, accounts and deals is just a tap away. Stay up-to-date on their deal's details before they step into a sales call. After their meeting, they can schedule follow-up activities and update details even as they walk into their next appointment. With a familiar interface on any device with a browser, they can keep moving and never miss a sales step.

Deep customer insight

Effective deal management starts with knowing your customers. A good sales CRM tells you everything you need to know about your leads, opportunities, accounts and contacts. With Pronto Sales App, capture personal and conversational aspects of a contact or account interested in your products, and create deals that can be tracked meticulously through your pipeline. Gain complete details about your customers and the activities or appointments scheduled via your timeline view for data to create and fill your pipeline and increase your conversions.

Product Information, Search and Filter features

As you expand, the number of products grow with you. It can be difficult for representatives to know which products are suitable for their clients as well as become inconvenient for the business to manage all inventory information in silos. With real-time inventory synchronisation with Pronto Xi including stock levels and pricing, your representatives can get all the key promotional, technical and marketing information in a timely manner and find what they are looking for with our intuitive product search tools. This means your representatives are guiding your customers with up-to-date product information and ensures their interactions are consistent throughout every touchpoint within the business.

Representatives' Dashboard

At a glimpse, view all you need to know about your progress by visiting the Dashboard.

Gain a comprehensive overview of the organisation's health by analysing your best customers, products, representatives and their activities, recent sales and other critical data, in one place. With multiple reports on a single screen, discover insights and chart progress towards your goals.

Put your orders together quickly

To allow your representatives to focus on creating relationships, Pronto Sales App incorporates tools to quickly create orders based on item codes rather than the usual approach of keying in search terms. They can even create template orders that can be client or task specific which they can work through and either order as is, or simply adjust the quantities for their client. This way, their regular customers' orders become easy to handle.

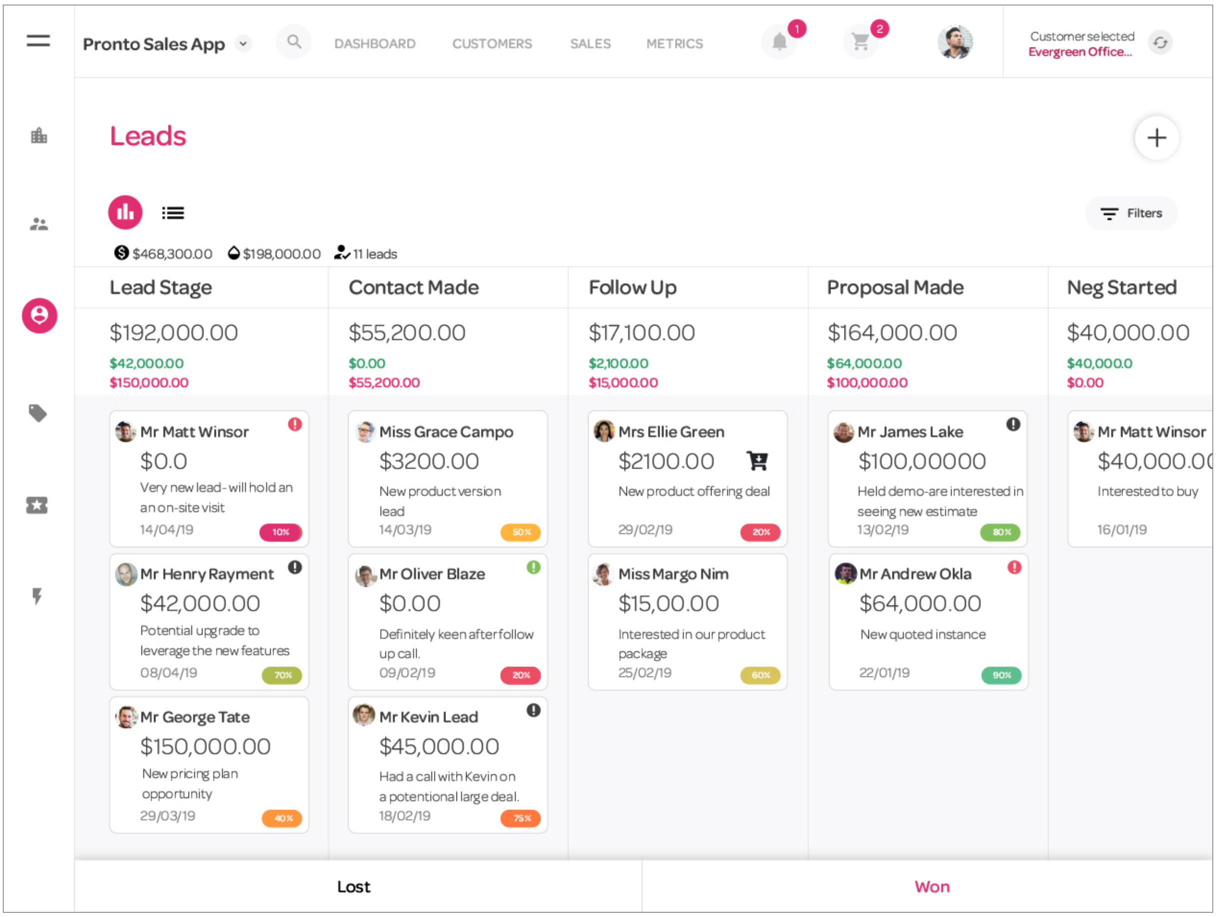
Order history

With full visibility into a customer's past order history, your representatives can facilitate better conversations that lead to repeat purchases as well as gain insights into fluctuations with order quantities. With account ageing information readily available at hand, your representatives can ensure that they have a glimpse of unpaid invoices or unused credits that customers need to address.

Deal management

Gain total visibility into your pipeline as all deals can be managed in one view, with the ability to drag-and-drop your leads or opportunities between different stages of your sales funnel. Having a clear overview of all deals can improve strategic decision-making and the quality of engagements.

The pipeline focuses your representative's efforts on the pipeline activities providing a clear visual of their current status, and what they need to do next. Considering the pipeline is their starting point, it keeps their actions organised and in line with overall business objectives.



Track all your leads and opportunities meticulously throughout one interactive sales pipeline.

Focused activities

Representatives can schedule activities and attach them to deals in their pipeline to see their entire to-do list on one, easy-to-navigate page. Activities can also be assigned to a contact or account based on your business preferences, meaning representatives will never miss a follow-up task.

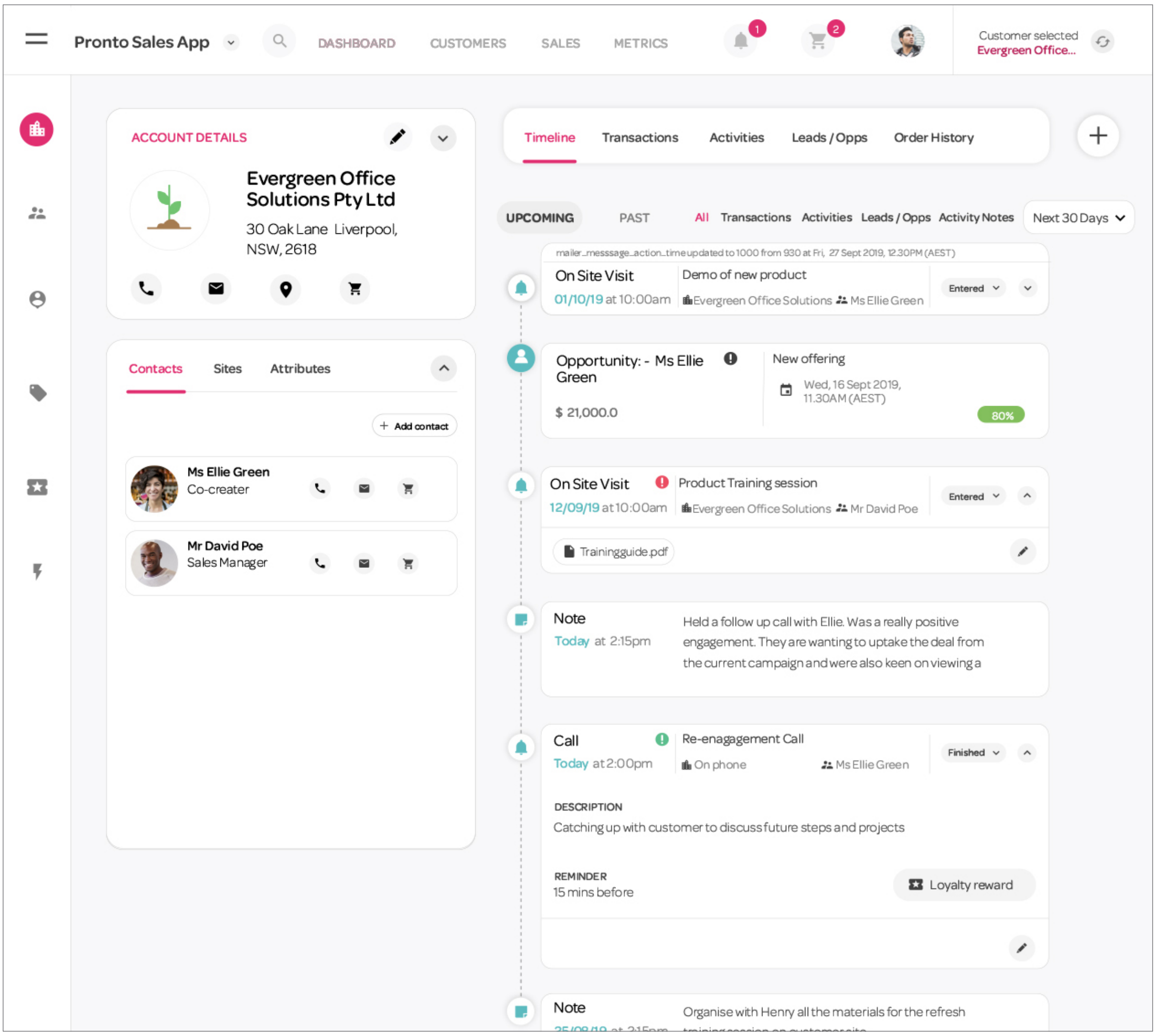
Get a 360-degree view of your deals

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.

Track sales engagement

The new timeline view of accounts, contacts, leads and opportunities displays sales activity chronologically. This detailed visual representation shows a snapshot of how engaged prospects and customers are during a sales process.

It gives you a run-down of all touch points with a record, everything instantly including their notes, activities and transactions in one single stream. This view enables staff to better evaluate a situation and make smarter decisions, increasing productivity levels.



Stay up-to-date on each of your customers with a detailed timeline view of all related personal details, contacts, past activities and scheduled engagements.

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.

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

pronto.net
Pronto-Software
@ProntoSoftware
ProntoSoftware