PRONTO Xi

Applications Overview

Asset & Facility Management

Simplified services

Trademarks

Disclaimer

Contents

Simplified services

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

With Pronto Xi's service modules — Project, Service, Pronto Service App, Service Connect, Maintenance Management and Rental — you have a complete end-to-end lifecycle solution for your customers.

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

Service allows you to minimise customer wait times by keeping track of high-priority service issues, customer service history, warranties and time-critical customer service–level agreements (SLAs). By authorising your back office to manage service calls — from contracts and call allocation to invoicing and reporting — in a central location, Service gives you more time to focus on providing exceptional customer care.

When service engineers are in the field, Pronto Service App equips them with the functionality they need to complete predictive or reactive work. They can also invoice customers and complete payment transactions onsite.

Service Connect is a user-friendly web portal which enables your customers to raise service calls, track the status and review the accompanying conversations in real time, giving them the ability to obtain information on demand.

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

Finally, all the above modules integrate with Pronto Xi's Resource Management and Resource Scheduler, enabling you to plan human and non-human resources. It provides a thorough work roster and employee award system to optimise your workforce. Once the end-to-end process is complete, awards and allowances flow smoothly into Payroll.

Schedule 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.

Project

Project automates the time-consuming aspects of project quotation for greater cost control

Project integrates with other Pronto Xi modules to keep you updated on work orders, sales orders and service calls, minimising unforeseen costs.

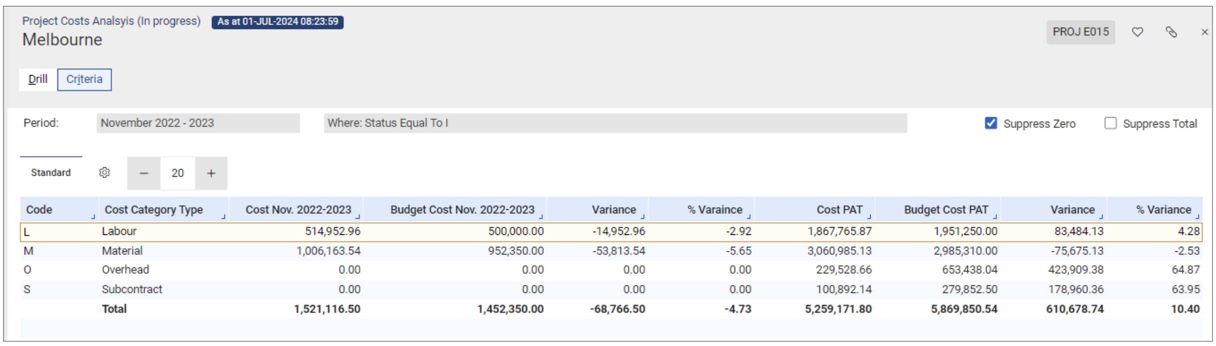
Key features of Project include:

- multiple cost centres and budgets per project
- full Cost Breakdown Structure (CBS) for greater cost granularity
- Project Tasks and milestones, helping you achieve greater control over project activities and deliverables
- full integration of Project Tasks into Resource Management for clear visualisation and scheduling
- flexible, progressive invoicing or billing via Claim Schedule
- project hierarchies of up to 20 levels
- customisable profit take-up and release rules
- flexible timesheet creation via Project or Resource Management, with seamless updates to Payroll

Executive Summaries

Project Executive Summary is a powerful analysis tool that provides instant insights. It also allows you to drill down to source data without creating reports.

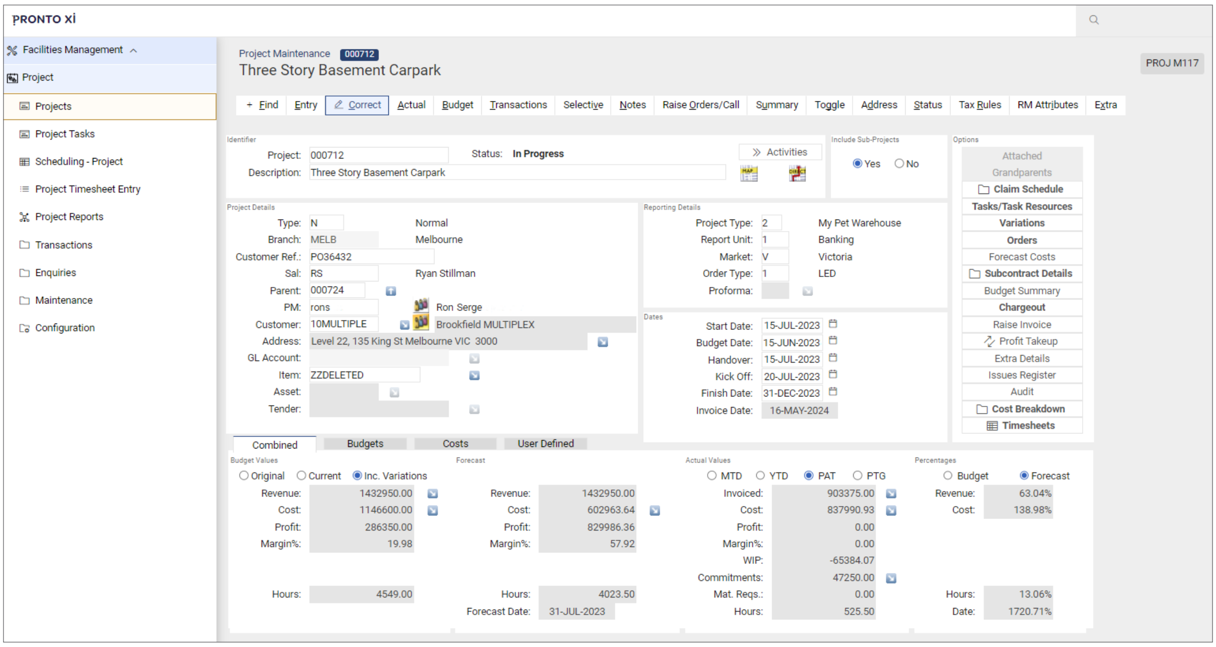
Project Summary Views are highly customisable and can be based on a combination of Project dimensions. Use the predefined views or customise numerous drill paths to suit your requirements. You can also use project hierarchies to group data.



Project Costs Analsyis (In progress) As at 01-JUL-2024 08:23:59
Melbourne
PROJ E015
Drill Criteria
Period: November 2022 - 2023 Where: Status Equal To I Suppress Zero Suppress Total
Standard 20

Code	Cost Category Type	Cost Nov. 2022-2023	Budget Cost Nov. 2022-2023	Variance	% Varaince	Cost PAT	Budget Cost PAT	Variance	% Variance
L	Labour	514,952.96	500,000.00	-14,952.96	-2.92	1,867,765.87	1,951,250.00	83,484.13	4.28
M	Material	1,006,163.54	952,350.00	-53,813.54	-5.65	3,060,985.13	2,985,310.00	-75,675.13	-2.53
O	Overhead	0.00	0.00	0.00	0.00	229,528.66	653,438.04	423,909.38	64.87
S	Subcontract	0.00	0.00	0.00	0.00	100,892.14	279,852.50	178,960.36	63.95
	Total	**1,521,116.50**	**1,452,350.00**	**-68,766.50**	**-4.73**	**5,259,171.80**	**5,869,850.54**	**610,678.74**	**10.40**

View comprehensive project data and drill down to underlying projects



Find all project details in one central area

Project types

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

Project allows you to create number of different project types, 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)

Project workflow

Creating a quotation or responding to a tender? 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. Set up Project Tasks to define the activities, resources and commitments required to carry out each project phase.

Once projects are in progress, track incurred costs and income earned. Project fully integrates with Pronto Xi modules, such as Accounts Payable and Purchasing, allowing you to record the project and cost category against any purchase order or supplier invoice.

In addition, you can directly raise purchase orders for required materials from project budgets and apply these to each relevant Project Task. This ensures all commitments are managed in conjunction with the project activity or deliverable. Purchase orders can also be consolidated to help save on shipping costs, and materials held in a dedicated warehouse until due onsite.

Where items are built specifically for a project, Project creates manufacturing work orders based on a standard bill of material (BOM). You can also customise configurations using the Sales Configurator tool.

Project integrates with Pronto Xi's Payroll, Resource Management, Resource Scheduler and 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 so the true cost of a resource is accounted for.

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

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

The Master Claim Schedule also reflects these costs and income against the original item list or any items defined as variations of the project.

Project lifecycles

A project goes through a number of stages from creation to completion, and a different status represents each stage.

Raise a Quotation

Generate quotations based on estimated costs, and record customer details and nature of the project at the same time.

Modify Quotation

Modify quotations at the negotiation or re-evaluation stage. If costs are incurred before the final budget sign-off, record these before moving the project to In Progress.

Accept/Reject Quotation

Once the quotation is raised, accept or reject it. An accepted quotation becomes a project In Progress, while a rejected quotation is archived as a lost quotation.

Setup

Capture initial project details during the setup stage. You can also record any costs against the project and revise original cost estimates.

In progress

Once a project is In Progress, record costs incurred against the project, as well as invoices generated, variations processed and profit taken up.

Close the project

When a project is complete, 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 changes to "finished".

The close-out operation is irreversible, but sub-projects can be attached to a closed parent project.

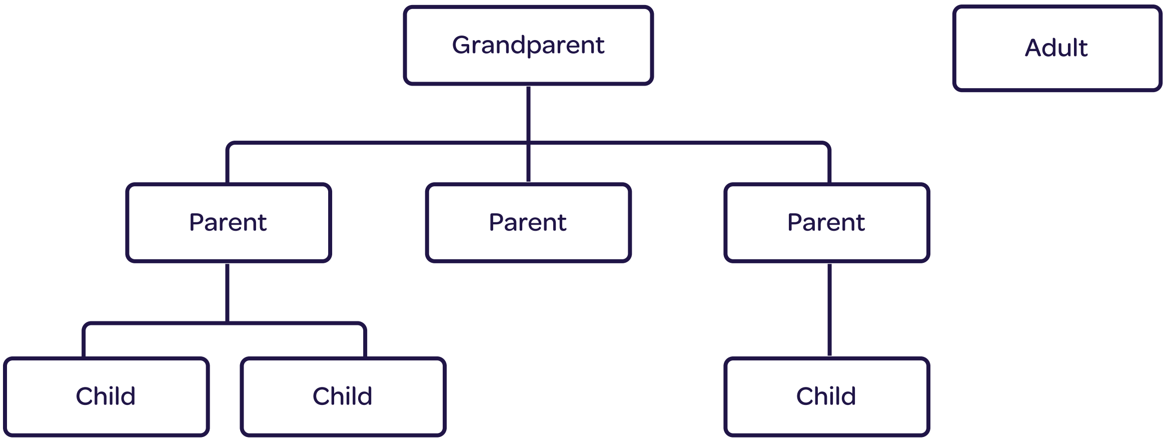
Close-out rules

Set close-out rules according to different types of projects and locations, providing flexibility for businesses that need it.

For example, choose to fully invoice contract projects to their full value before close-out. Or invoice the value for time-and-materials projects once those costs are determined.

Apply up to 11 close-out rules to a project. These can include:

- prevent closing if the project is not invoiced fully 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



Set up a project hierarchy

Relationships between projects

Use Project to build a hierarchy of projects for enquiry, reporting and invoicing purposes. Four hierarchy levels are available, with up to 20 Child projects available under the Grandparent/Parent hierarchy. The levels are:

- **Grandparent** — The highest-level projects, available only for enquiry purposes. Pronto Xi rolls up the budgets and actuals of the lower-level projects to the Grandparent
- **Parent** — These projects can have sub-projects attached, with budgets and actuals rolled up to the Parent project for enquiry and reporting. If the customer is invoiced at this level, costs from the Parent and sub-projects aggregate, the mark-up is applied, and the parent project is billed
- **Child** — These sub-projects are attached to a Parent project but have their own budgets and scheduling. Costs may be posted directly to sub-projects and projects invoiced at the Parent or Child level
- **Adult** — Independent projects with no relationship to other projects

Cost management

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

The CBS provides a sequential framework of activities and their related costs. You can itemise and prioritise tasks within a cost category to assist in the scoping, quoting and tendering of 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 hierarchical structure, you gain greater control when applying mark-ups, factoring variations or managing the analysis of project budgets versus actual costs.

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

Benefits include:

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

Cost categories

You can group certain types of costs within a project into cost categories and assign separate budgets and cost totals to each category to assist with budgeting and analysis.

Costs

There are multiple ways to incur direct costs against a project, including:

- sub-contracting
- purchasing
- inventory
- supplier invoices
- journals
- timesheets

Issue inventory to a project directly or via a sales order, purchase order or supplier invoice.

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

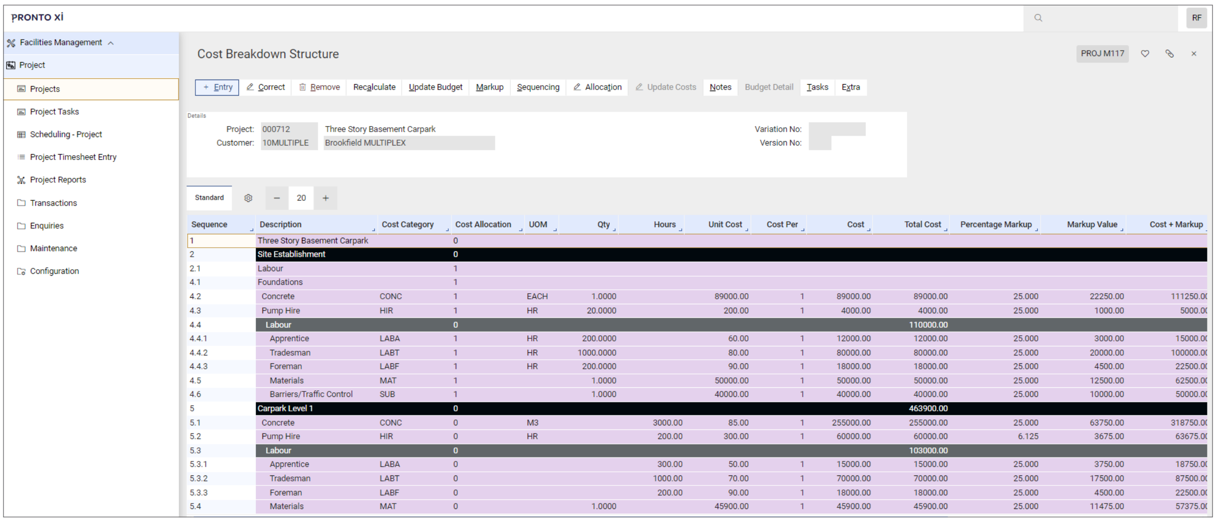
Journal entries — using the journal function in Financials — can be used to record indirect costs against projects.

Variations

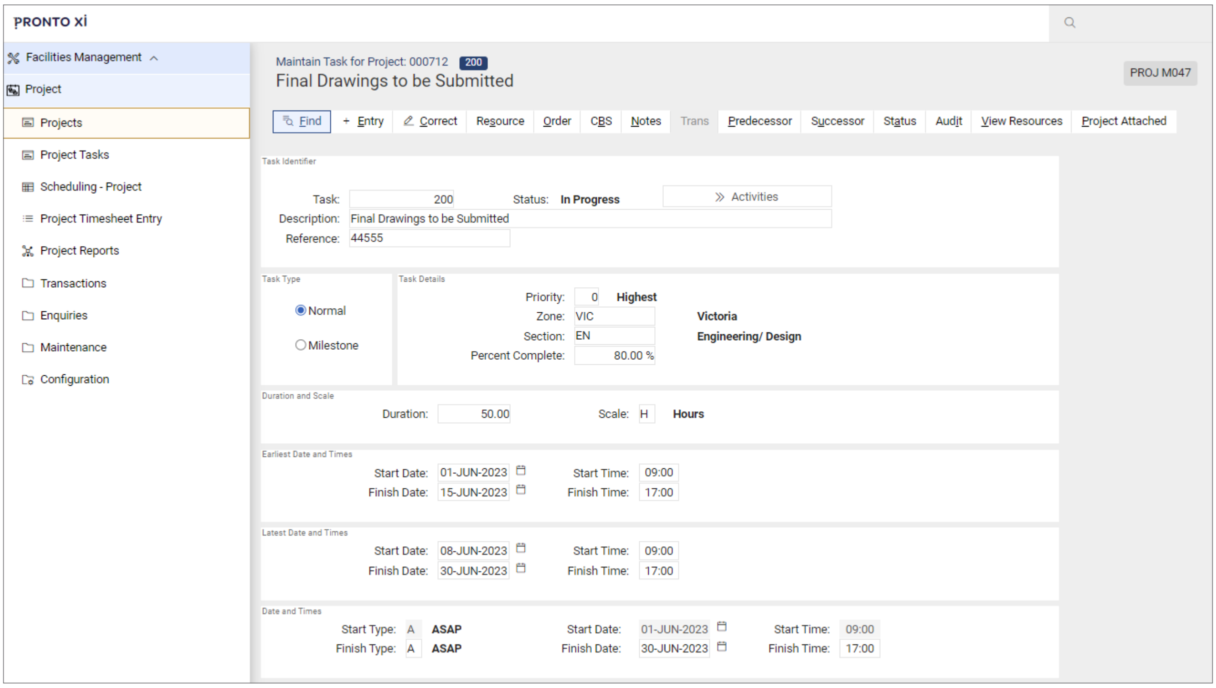
Project allows you to make and manage variations to the original project.

Monthly summary

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



Review granular cost details with the Cost Breakdown Structure



View details of a Project Task

Project 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 Tasks brings together budgeted cost estimates and the activity details necessary to get the job done on time and on budget.

Project Tasks allows you to view each task's percentage completion and status, helping to deliver greater insight into the project's progress. Under the Project Task structure, you can plan and organise deliverables in line with critical milestones, ensuring 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 — such as 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.

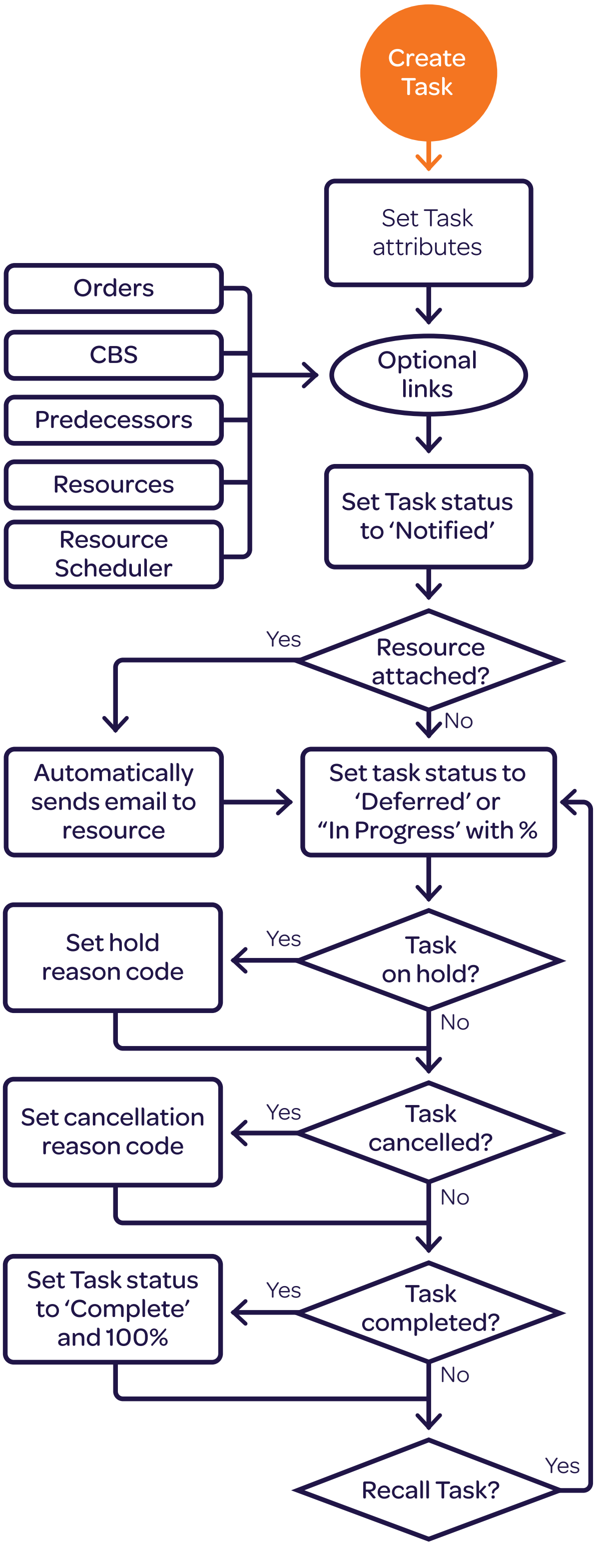
Project Tasks also manages communications with your resources. As time frames change and milestones are impacted, it delivers instant notifications to keep all allocated resources fully informed.

Find Project Tasks on the Resource Scheduler. Email key task details to allocated staff in advance of the scheduled work and attach calendar appointments that include the task details.

Other key features of Project Tasks include:

- an 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



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

The Project Claim Schedule creates invoices for customer billing, and can be used to develop a project budget.

Customer claim entry

Work begins once the project status is In Progress and you can raise claims to invoice the customer.

The Claim Control function facilitates three claiming methods:

- **Invoice method** — A direct invoicing method that does not consider certification or progress claims.
- **Progress invoices** — These are based on costs 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 attempts to retain more than the agreed values.

Claim entry

Enter claims manually or in bulk via an amount or percentage. Define these values against a master item or any of the sub-total or grand total lines of the claim, then apply pro rata across the appropriate sections of the claim.

Claim lifecycle

A typical claim lifecycle 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, use the notes tool against each action to capture details, such as phone calls, letters and faxes.

Certification

A submitted claim is sent to the customer for their review and approval before they return a payment advice. This document states the claimed, assessed and retention amounts defined by the customer, and 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 to certify claim amounts.

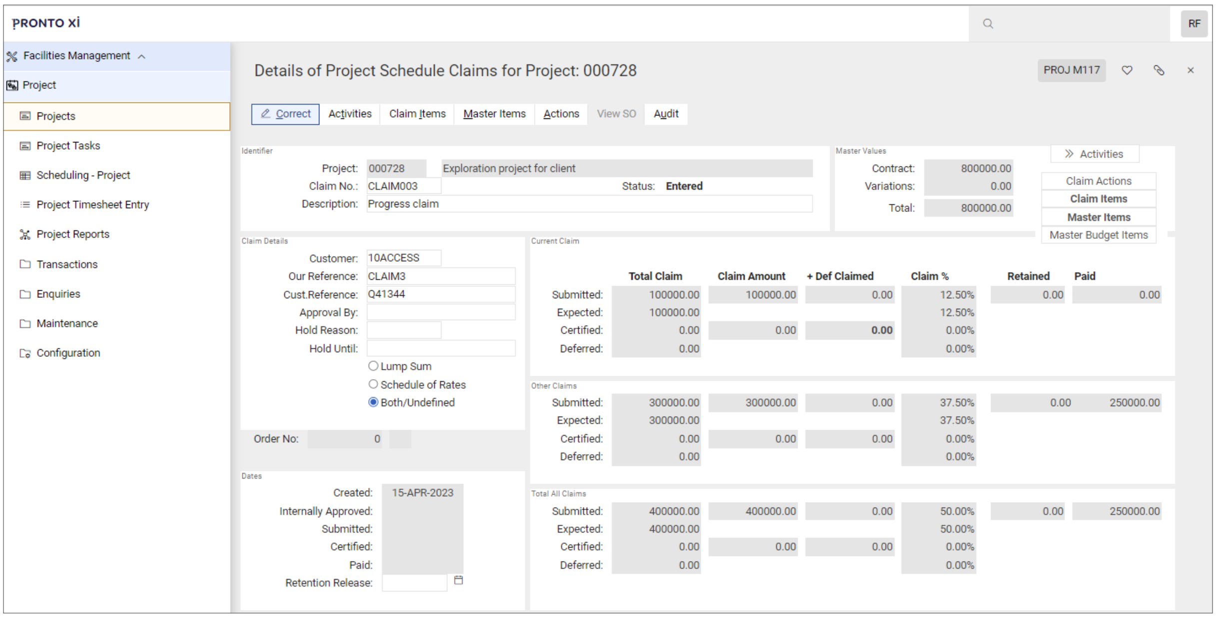
The defer method records the difference as a separate amount on each claim item. You can then discuss this with your customer and potentially offset in the future.

Customer retention release

If the customer retains funds during the claim process, you can request their release via a retention release order. This can occur at any time but typically happens towards the end of a project.

Claims enquiries

The Claims Enquiry screen makes it easy to find claims through powerful search parameters, including dates, statuses, types of claims and claims with variations.



Create and submit Project claims

Income

In addition to capturing incurred costs, Project records income earned. Recognise income 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.

Generate invoices in stages using an invoice schedule based on either a fixed amount or a percentage complete.

Progress claim

A sales order invoice is created for progress claims but is held 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 profit to take. If no profit is taken up during the project's lifecycle, 100% of the profit is 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** — 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** — Assumes that the true completion status of a project is the amount invoiced against the contract value
- **Actual-based method** — Assumes a project is 100% complete and takes up all actual values
- **Cost/sales-based method** — 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 the General Ledger based on user-definable fields and project types. This ensures postings end up on the correct balance sheet or profit-and-loss statement according to your business'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 for your team and your customers' team, helping to facilitate communication.

Issue Register

The Issue Register lists administrative events and activities that need to occur during a project, and assigns responsibility for events and activities to specific individuals. The My Issues function allows individuals to review allocated issues and actions across multiple projects; any issues or actions approaching their due date display in calendar view.

Sub-contracting

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

Supplier agreements

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

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

Enter claims for work performed by sub-contractors using either a summary or detail method and assess them based on the terms and conditions of the sub-contractor agreement.

Entries include:

- claimed and assessed amounts
- reasons for any differences
- retention amounts
- tax amounts
- percentage of labour

Project Sub-Contractor automatically calculates the default retention amount and the assessed amount's tax component.

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

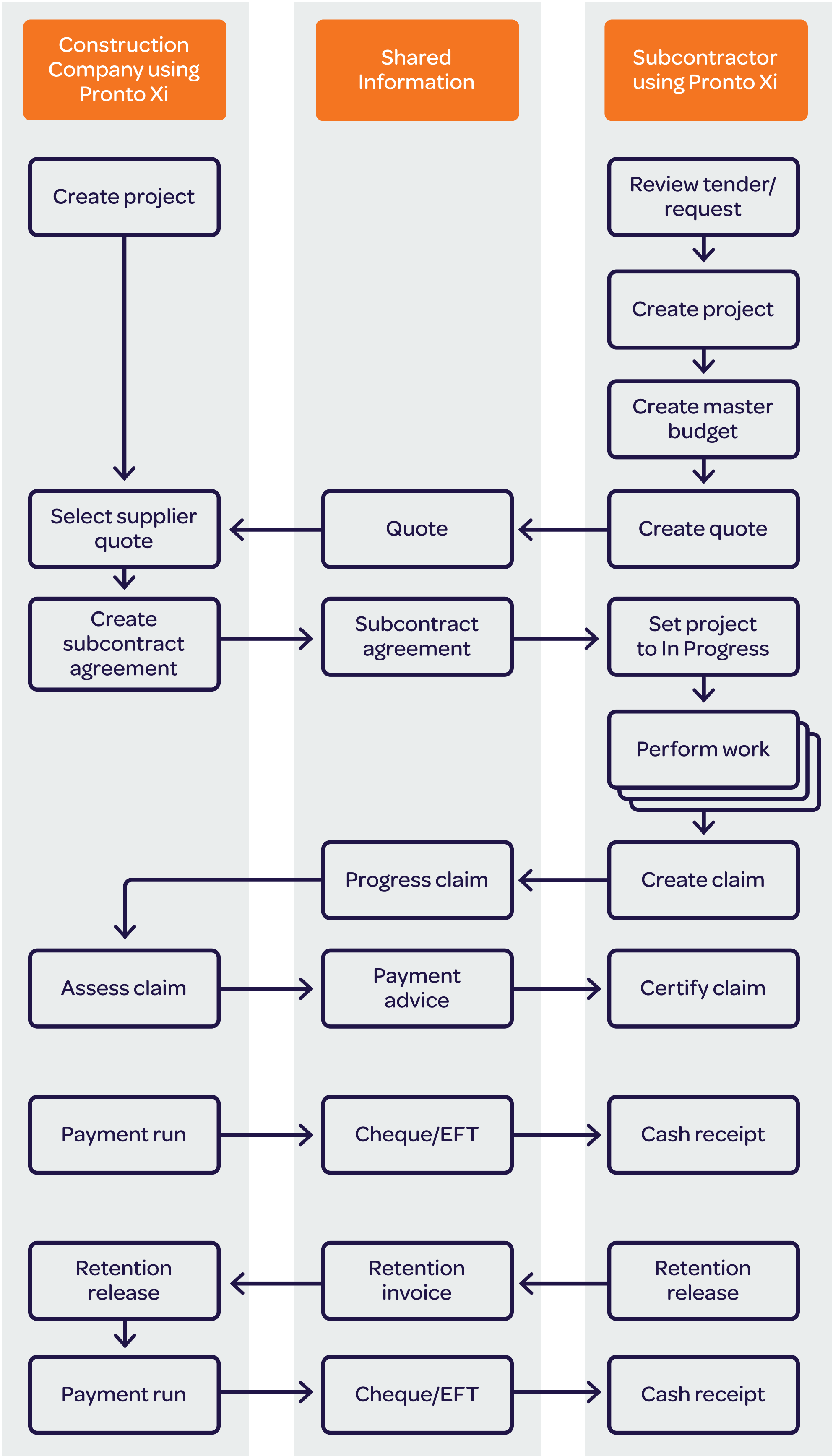
Release held retentions at any point in the lifecycle of a sub-contractor agreement. Any retained funds are held in a separate General Ledger account. When they are ready for release, Pronto Xi will automatically create a taxable payment for the sub-contractor.

Enquiry on sub-contractor agreements

A single project manager may be responsible for many sub-contractors and projects, making it important to have a powerful enquiry tool. With Project Sub-Contractor, you can filter sub-contractor data according to various criteria.

You can also filter agreements by type (such as lump sum, scheduled rates or supply), status, variation types or claim types. Use criteria to select matching sub-contractors.

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



Create a sub-contractor claims workflow

Security

Budget limits

Project Manager Limits enables you to set the budget or contract value amount for a manager to control at different stages of an individual project. You can also set an in-progress limit but not a completion limit.

Branch masking

Restrict users to specific projects based on branch masking rules to ensure branch data remains secure.

Credit limits

Project notifies you if a project budget takes a customer over their credit limit. You can 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 records and reports labour costs, hours and overheads against a project or service call.

With the Timesheet Control table, customise timesheet entry based on your business needs. Customisation options include:

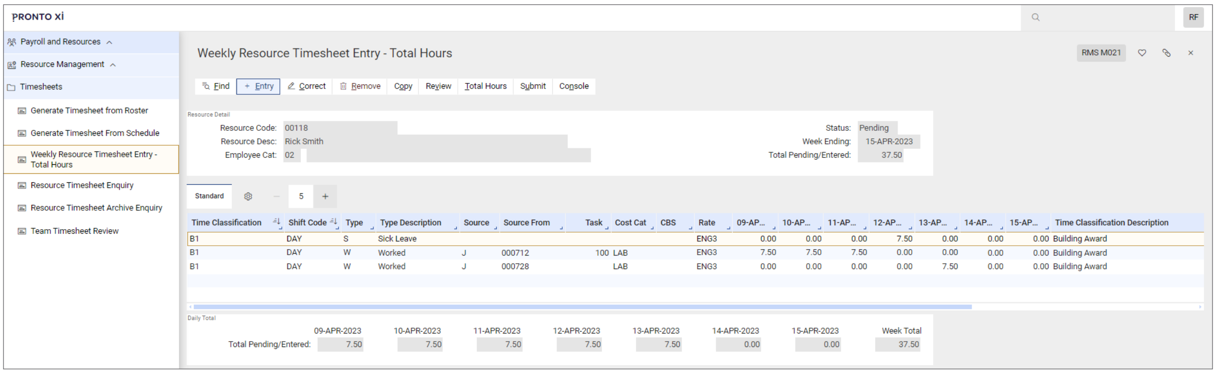
- a variety of methods for calculating cost rates
- a variety of methods for calculating charge-out rates
- the option to integrate timesheets with Payroll, either via Projects or using the Resource Management module (if turned on)
- choice in the detail required for timesheet entry
- the ability to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

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

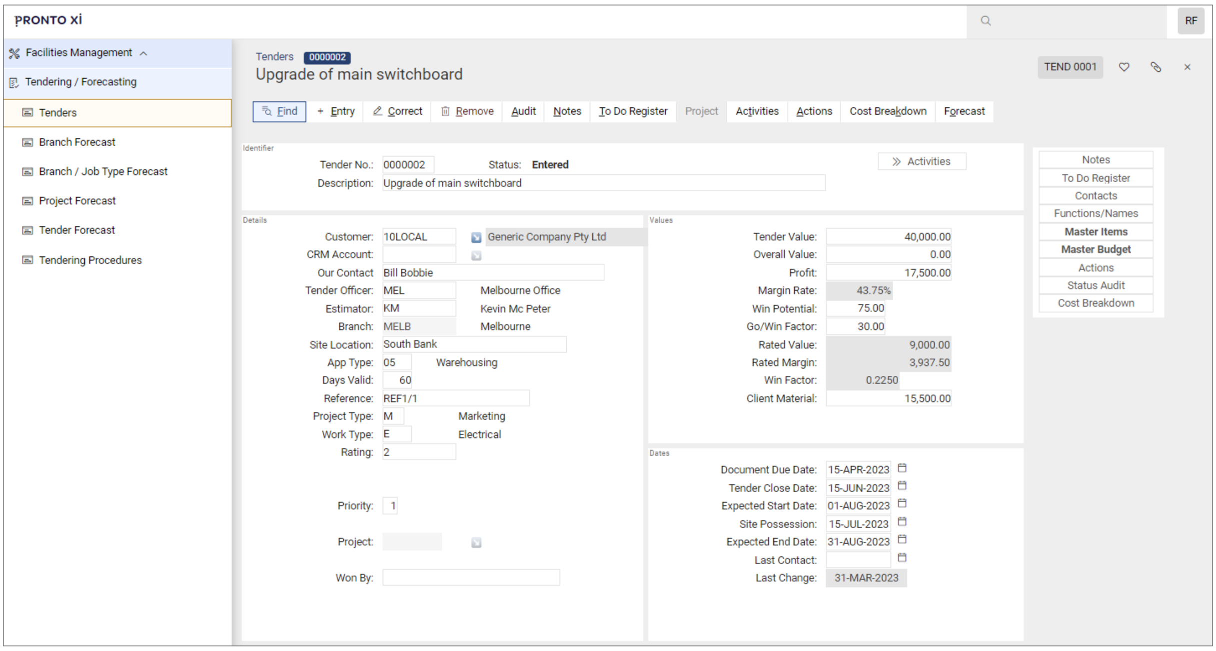
You can also set rates for overhead recovery against labour costs and automatically post these.

Equipment cost and charge-out rates

Assign an equipment resource by 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 and link to Projects



Manage all activities in the Tender process

Tenders

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

With Tender Management, you can forecast probable contract values and margins on tenders, current jobs and service contracts.

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

Key features of Tender Management include:

- go/win factor
- the ability to build a detailed Cost Breakdown Structure 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.

Integration with Project

Service integrates 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 integrates 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 through its 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 further improve the performance of your service operations.

Contracts

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, and the duration and terms of the contract.

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

For users of Pronto Xi's Sales and Inventory modules, covered service units include items previously sold to that customer, either directly or through a distributor. It also caters to equipment sold by another supplier, recording a description and serial number and keeping this separate from your regular inventory.

Time-based service recording

You can use time-based service recording for your contracts' labour or travel coverage, enabling you to sell prepaid service coverage. Three time-based billing cycles are available at:

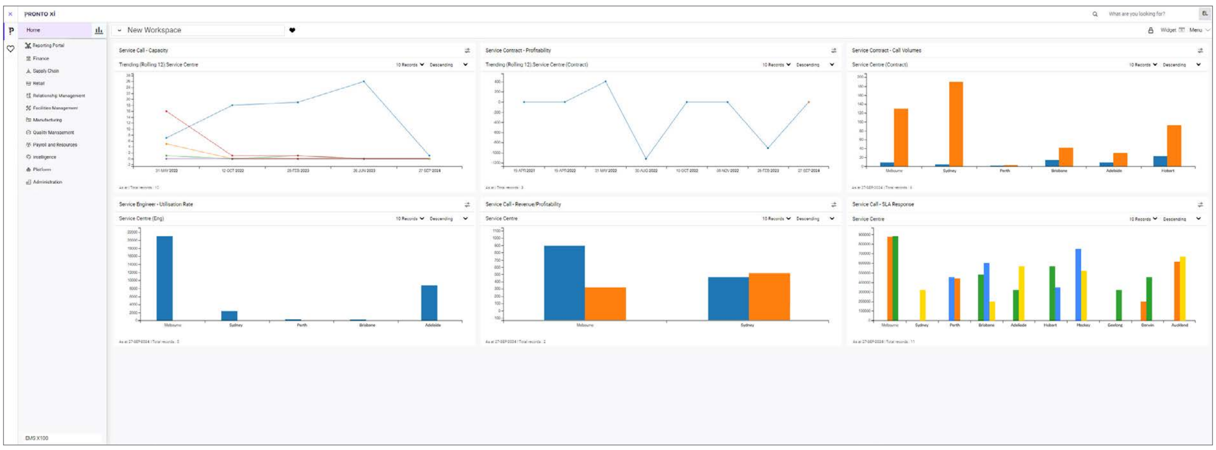
1. contract level
2. unit level
3. contract level with voucher numbers recorded

After selecting 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 for serialised items only.

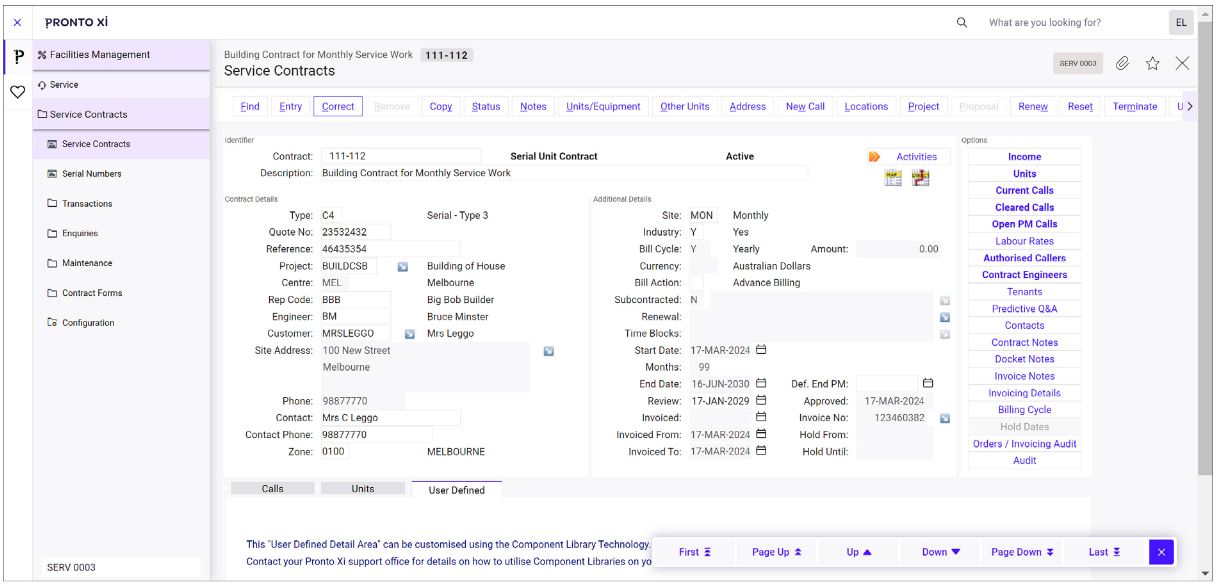
Contract invoicing

Bulk contract invoicing routines in Service streamline the invoicing process. They calculate and recognise 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. Tailor customer-facing invoices for contracts and calls, with flexible crediting features to cater for partial or full invoice credit arrangements.



Get a bird's-eye view of service performance



See all relevant service contract details in one place

Billing cycles

Get 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, and the contract itself, meaning you can add or remove units from the contract. The next invoice is adjusted on a pro-rata basis.

Advanced billing or unearned income

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

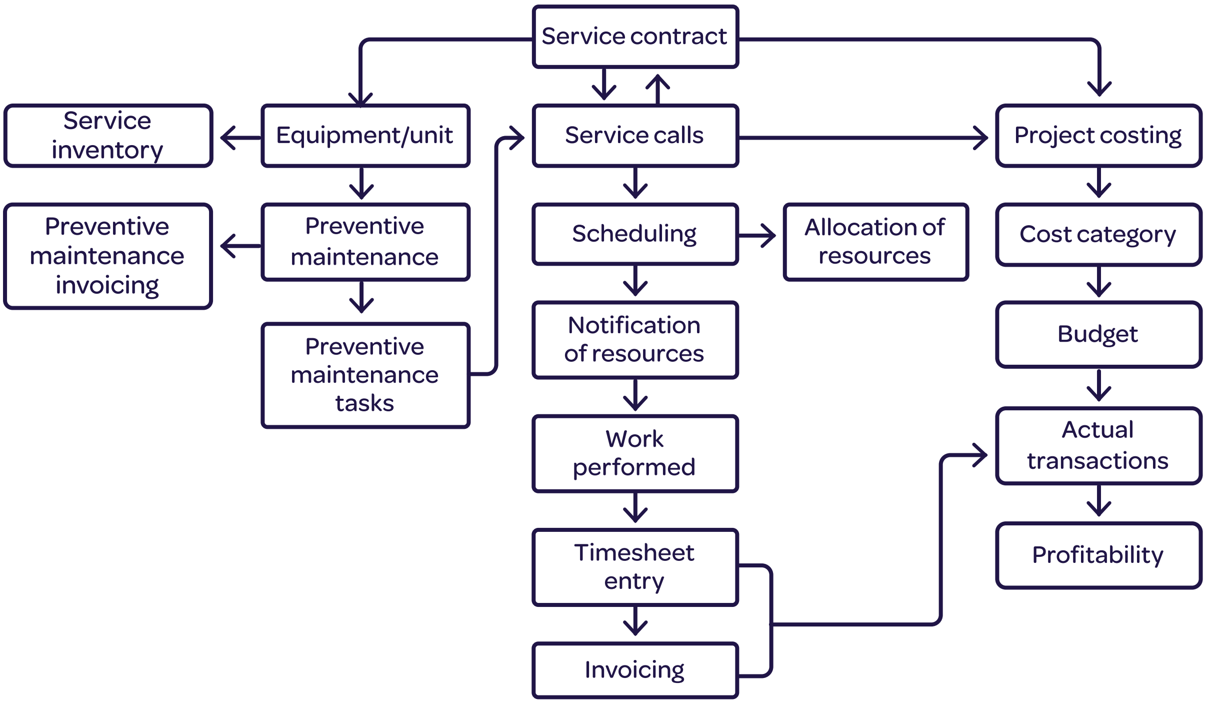
Renewals

To help 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.

Contract on hold and billing on hold

You can choose to put a contract on hold without closing it 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



Create a service management workflow

Service calls

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

New fields to code tables

We've added a new Transaction Start Code field in the Service Centres code table. Enter the code into this field, and it will define the action that initiates the activity.

New call type fields for RM Attributes and RM Attribute Groups now appear on the Call Type code table. Enter the resource attribute status of the service centre and the attribute group code, respectively, in these fields.

Custom date fields

We've introduced a new exportable procedure. Use this procedure to customise date fields in the Pronto Service App.

Code tables validations

We've applied validations to several codes, such as Action Code, Call Priority and Call Type, and Service Centres code tables. When you set up these tables with default data, the data is validated against existing data. If the field does not exist, it's deemed invalid and you'll see an error message.

Call logging

Log calls using either the Wizard Call Logging screen or the Form Entry Logging screen. This extends to other Pronto Xi modules, such as Service Connect, Pronto Service App and Resource Management.

Because each screen prompts you to select the correct information, Wizard Call Logging is particularly useful for casual users or new users. Meanwhile, Form Entry Logging suits more experienced users, permitting them to log calls quickly.

To ease the administrative burden of creating service calls for repeat work, the Copy Service Call function creates a call from a previously logged call.

There are three main types of logged service call:

1. internal calls, where the unit to be serviced will be brought to your workshop
2. onsite calls, where your engineers must go onsite
3. telephone support calls

Log calls 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 account status in the Accounts Receivable module.

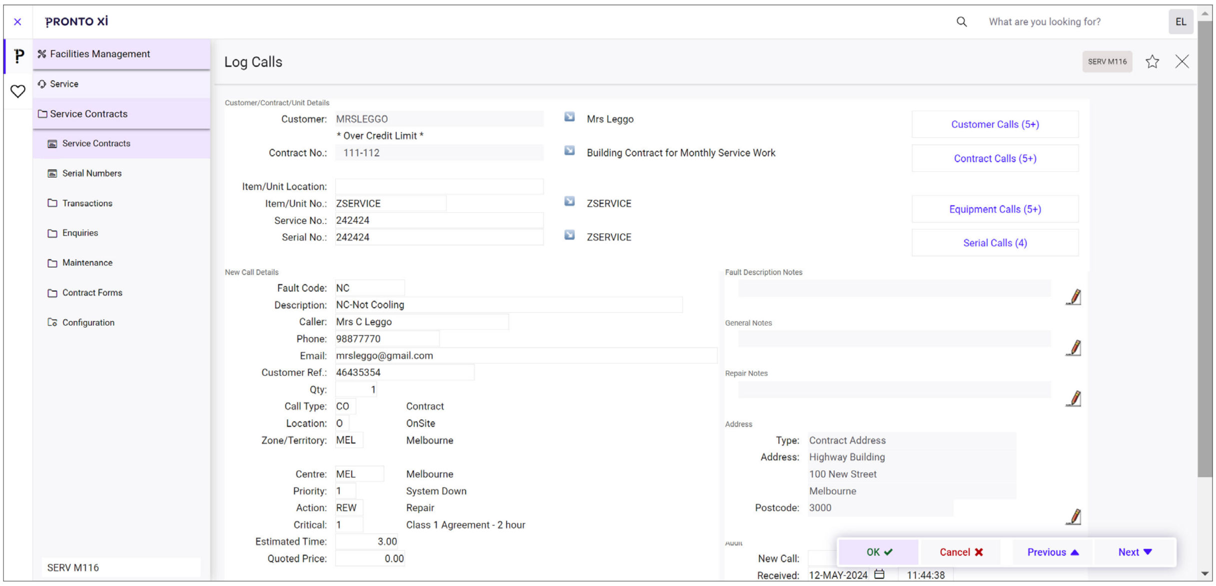
Simultaneously, the service site address is validated using Google Maps, and it generates an Estimated Travel Time to provide a notional representation of travel time to the site based on a time-zone table. Resource Scheduler and the Schedule View in Resource Management both display the travel and working times. A separate Google Maps licence is available.

When 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.

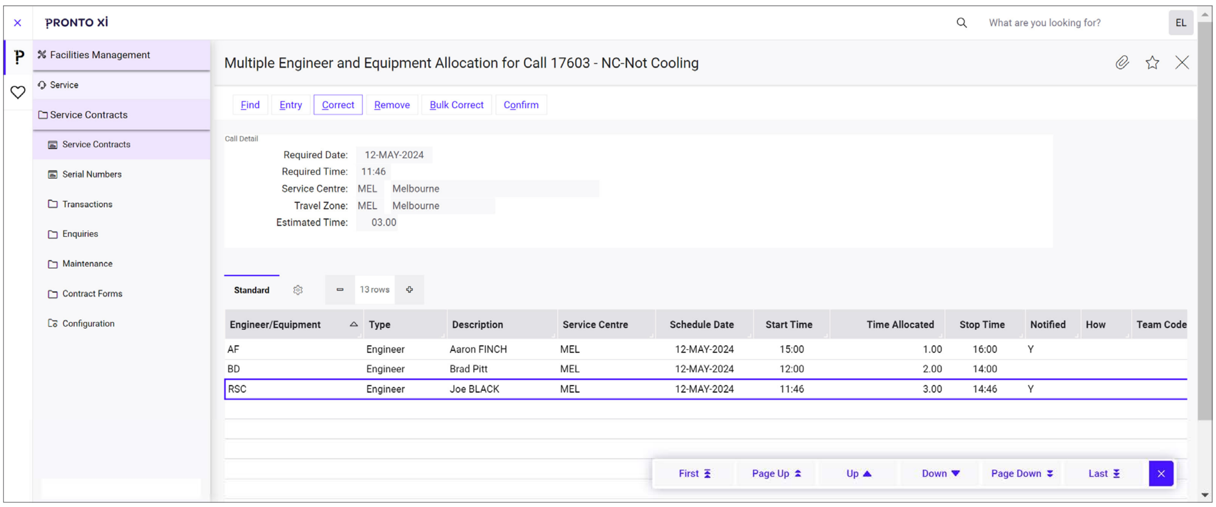
You can also check whether the contract is active and the caller is authorised to place the call, although there doesn't need to be an active service contract to log a call.

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

Enter a quotation at the same time a call is logged to place the job on hold pending its acceptance.



Log service calls raised by back-office staff



Allocate resources to a call

Service call maintenance

Combining all 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 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, supporting flexible reporting methods.

Critical calls

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

Critical codes provide the building blocks to define your targets. They are automatically set against service calls according to defined rule sets or can be set manually.

Service call transactions record when you meet key milestones — Response Time, Onsite and Completed Repair — throughout the service call lifecycle. 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 missed milestones. This enables them to take pre-emptive action to meet the targets or manage customer expectations.

Service centres

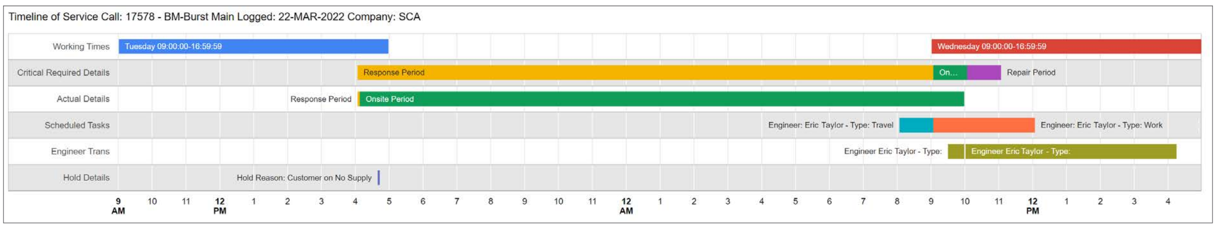
Service calls are usually logged in a service centre, which may be a workshop where the service work is conducted, or a centralised base that monitors service calls and distributes them to engineers who travel to sites to perform the work.

If you have a centralised service centre taking calls from various regions, the regions are identified when 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

The Service module has more than seven different types of notes, ranging from repair 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.



A timeline visual lets you see how a service call was tracked and if the call response was within the target

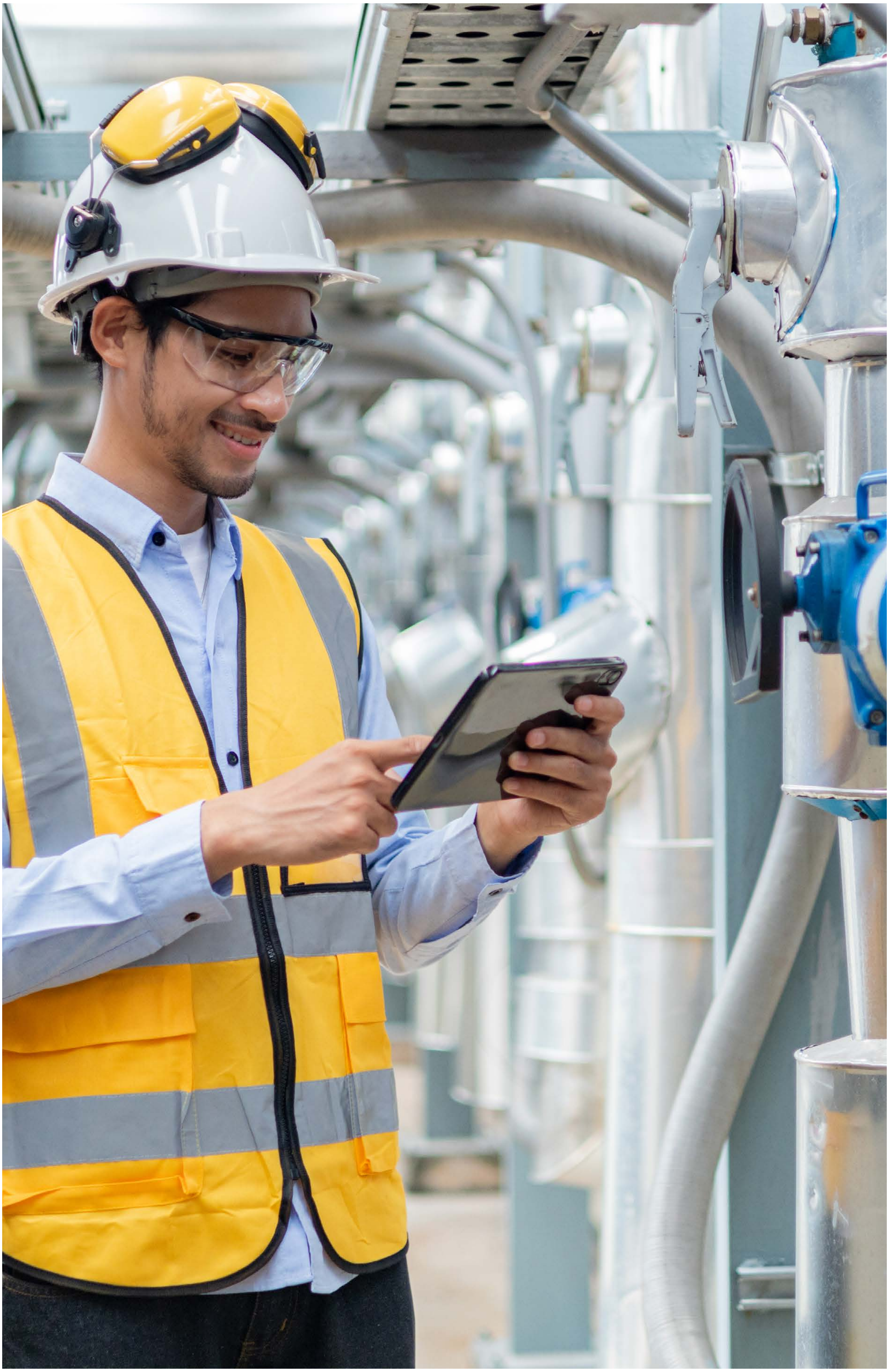
Preventive maintenance

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

- Detailed PM service calls are generated according to the equipment's 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 type of contract 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

Manage hierarchical run-based PM calls by consolidating serviceable equipment within a single PM service call for each run. Service technicians can then perform each routine for the service run within Pronto Service App. If monthly and weekly tasks are due simultaneously, incremental weekly tasks for the month are generated automatically.

Turn on Resource Management to allocate resources as a single person or team, or by attribute codes. You can allocate an engineer only on their work days or automatically based on their next availability.



Equipment locations

Equipment Site Location records 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 work history 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, a useful option for large or complex sites.

Manage locations against a contract as free-form text, then attach to equipment or units.

Equipment on contracts

A contract can include one or multiple pieces of equipment to service. 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 inventory tracking, Service recognises an engineer's vehicle as a "location" attached to the warehouse from which the inventory has been taken. Check and regulate inventory levels as required, and replenish ordering to maintain inventory levels.

Engineers' vehicles can also be set up as individual warehouses to do stocktakes for one unit or a group.

Integration with Distribution

Service fully integrates with Distribution, so inventory allocations and service calls can range from informal material issues to formal picking slips creation.

Service also links to Pronto Xi's Purchasing functionality. Create purchase orders and manage the entire procurement lifecycle against each service call. Set calls to Parts Required status to keep service technicians and their customers informed throughout the call and purchasing process.

Engineers

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

Display the activity of each engineer in Resource Scheduler, allowing you to develop and monitor their call schedule. Payroll can also store each engineer's employee number, so you can record additional payroll information.

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

Ranking Points

Use ranking points and attributes to allocate the most appropriate resource to the call.

Ranking points utilise the Resource Management attributes against Service calls by creating a weighted list of engineers based on points allocated for each ranking type. This weighted list is then used to allocate engineers to Service Calls and Project Tasks.

Set up ranking points globally or by service centre based on the following:

- matching service centre
- blacklisted engineer
- preferred engineer
- matching attributes
- last attended within specified days
- engineer on contract

Matching Attributes Points Allocation

Define Resource Management attributes to the required levels and roll attributes up to the service call to allocate engineers.

Allocate ranking points to Resource Management attributes defined on the call. Resources have matching attributes that can match 100% up to the resource ranking. Base rankings on the last time an engineer attended a call from this service centre, giving extra weight in points.

Integration with Resource Management

Resource Management is an optional module that can be activated by the 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 defines 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, allocate it to a single engineer, multiple engineers or a team of resources. Set up your system to do this as the call is entered, or choose to recommend an engineer based on contractual preference, skill, attributes, ranking points, territory or availability.

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

Check the status of a call at any time. Group calls by the engineer to easily see if someone is behind schedule, allowing you to reassign their calls to another engineer.

Pronto Xi records "real-time" work on each call and billable time. Once work is complete, you can enter full details from the docket, including the fault; in turn, you can assign a code and analyse calls by fault type.

Retain cancelled calls and finished calls on file and reactivate into live calls at any time, even if archived.

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

You can also charge tailored minimum time blocks within the billing cycle of a service contract to pre-bill blocks of time, which are consumed at call level when an engineer timesheets.

Preferred and blacklisted service engineers

Any contract site can hold a table of preferred engineers, allowing your customers to build trust in familiar engineers, increasing 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, you can link a resource type called “equipment” (serialised inventory or assets) to an engineer or leave it to stand alone.

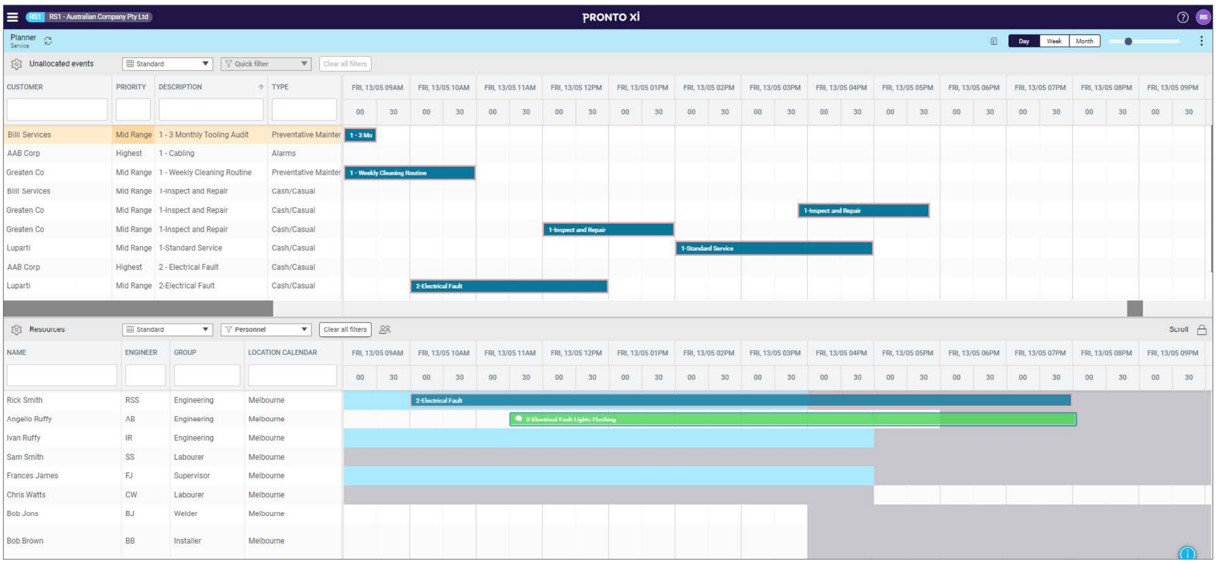
For further insights, Pronto Xi provides a visual to help you see which engineers are linked to which equipment and to know when certain equipment is booked out on a particular service call.

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 and stay on budget, ensuring minimum strain is placed on employees and resources.

It allows you 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 is based on historical data and adjusted to anticipate bottlenecks and low activity periods, eliminating guesswork.



Use the Resource Scheduler to view service-only resources and service calls

Pronto Service App

Deliver the information your field staff/employees/workforce need, anytime...

Pronto Service App links directly with Service to efficiently log, process and track all service activities. It's also flexible enough to manage all reactive and predictive service calls, ensuring you meet and exceed your service level agreements (SLAs).

Pronto Service App delivers a complete feature set — from call management to invoicing and payment receipt — making it the ideal field service solution for commercial and consumer service businesses.

When Pronto Service App is used with Service, you get a powerful service delivery platform that simplifies complex routines. It gives you more time to manage exceptions and uncover richer business insights, generating greater efficiency and giving you a tangible competitive edge.

Real-time information

With Pronto Service App, your field workforce stays connected and informed, and 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), Pronto Service App 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 all data captured throughout the service routine is represented on Pronto Service App's summary screens and the customer invoice. Technicians can email the invoice if their vehicle does not have a physical printer.

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

A separate Google Maps licence is available to access directions.

Data capture

With Pronto Service App, information can be updated on the go, helping field technicians manage their day-to-day workload, including unplanned events.

Field technicians can capture vehicle parts they've used, complete timesheets, raise purchase orders, raise materials orders from a central warehouse, and add photos. Pronto Service App also delivers improved cash flow as customer signatures are captured onsite, reducing the time between completing and charging for the job.

Connectivity

If a field technician goes offline, Pronto Service App stores the data within the browser cache of their mobile device and uploads it as soon as there is a connection.

Notes and documentation

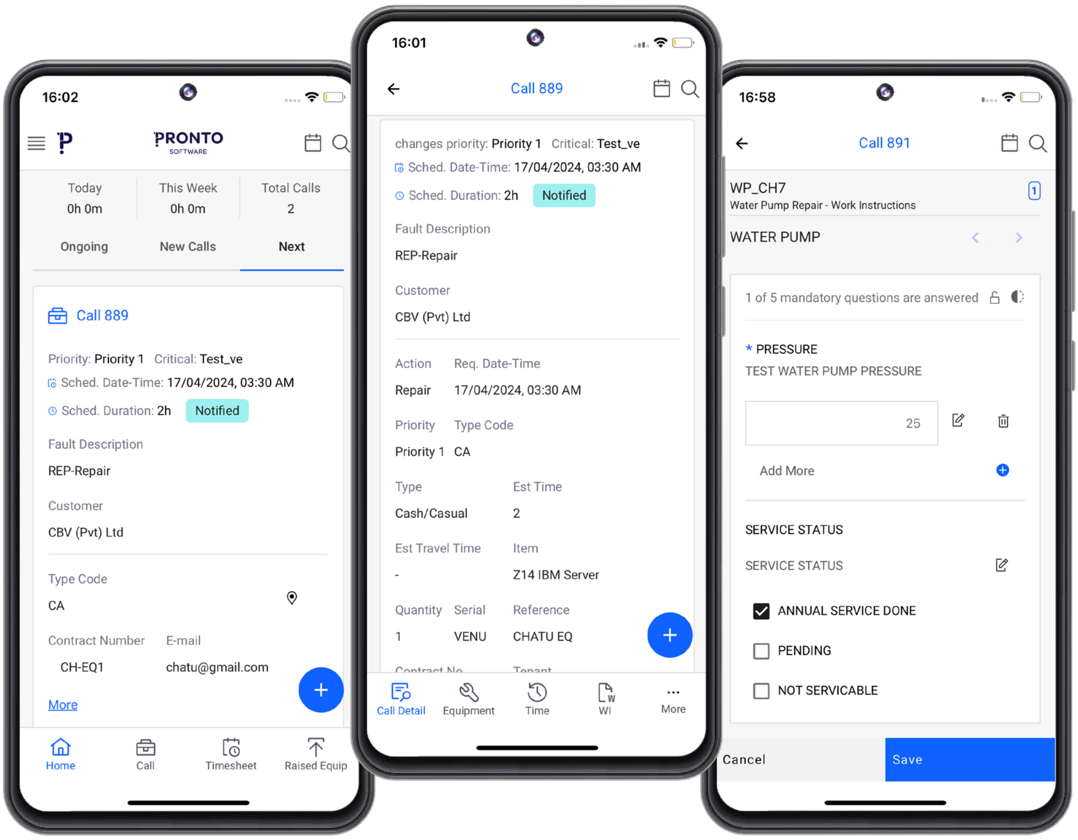
Pronto Service App delivers technical document management unsurpassed by any other offering. Link diagrams and specifications to your jobs, make comments and sketch annotations. Take photos, attach them to the job and annotate them.

You can also save notes to easily collaborate with your teams.

Scheduling

Pronto Service App incorporates a My Schedule view of allocated service calls and their required start times, allowing field technicians to plan their days or weeks. This ensures better workforce utilisation and improved planning for your business.

Office staff can also easily schedule technicians' days and see activity in real time with Pronto Xi's Resource Management and Resource Scheduler modules, which seamlessly update information flow between applications.



Schedule on the go with Service App

Engineer Scheduled Attendances

The Engineer Scheduled Attendances screen has been updated with a Schedule Lock field so you can edit the lock flag when the schedule status is incomplete.

Security & access controls

New attributes to Mobile servicer roles and engineer screens allow you to better manage access to the Pronto Service App, as well as user access granted to add materials.

Need to send a mail alert to an engineer, but they don't have a login ID assigned? A new public exportable procedure called public-send-mail without-login means you can get in contact.

Proof of presence

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

Pronto Service App is paperless, enabling field engineers to easily log proofs of presence against transactions in a service call.

Safety compliance

Pronto Service App 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. Pronto Service App's adaptability means you can ask the most relevant questions for your business and your people, giving you greater control over workplace health and safety practices.

A Signature & Attachments mode to the Safety Details for Call screen lets you to view the engineer's sign-off signature for the service call and any transaction attachments.

Invoice attributes

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 for greater flexibility with onsite customer billing arrangements.

Easy adoption

If you have ever introduced new procedures and forms to your mobile workforce, you know compliance and adoption are difficult. Pronto Service App simplifies the changes in daily routines, promoting early adoption.

In Service Management, the administration user can configure the front-end mobile screens to display the information required to the business using the following:

- **Screen Configuration** — Configure general screen settings
- **Registered Users** — Manage user licences
- **Service Engineers** — Maintain engineer details
- **Configuration** — View and maintain a work instruction set

API Configuration and Licence Control have an added "hide" field in the Pronto Service App screen (Screen Administration), allowing you to hide or show the selected field in the Pronto Service App.

Material orders

Engineers can request parts via a material requisition for either their vehicle or the service call. Create requisitions directly in Pronto Service App, which eliminates the need to call the office, and track within Service, Inventory and Pronto Service App workflows.

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

Navigation

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

Call screen updates

A new Signature & Attachments mode has been added to the Safety Details for Call screen so that you can view the engineer's sign-off signature for the service call and any transaction attachments. There's also an RM Attributes mode to view and maintain the resource attributes for the service item.

Work instructions

Pronto Service App'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 also function as customer site forms and emailed to the customer as a reference for the completed work.

Group Details, which allow the Parent Group field to select only those entries with a lower sequence number as a dependent group, is another enhanced feature.

Element Details for Group screen

We've made following changes and additions to the Work Instruction Element Details for Group screen:

- **Parent Element Sequence and Parent Element ID** — These two fields allow you to enter the sequence number that defines the order in which the elements are displayed on the Pronto Service App and the parent element ID, respectively
- **Type** — The Type field now supports an Input Range element type
- **Lines Reseq** — Use this mode to re-sequence elements of a group into the required sequence order in increments of 1.0

Add work instructions to a service call by using the add Work Instruction Set mode function under instructions.

Serial attributes

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

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 Pronto Service App, engineers can add new 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, and waits for approval before allocating the items 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 from an existing contract.

Call escalation

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

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

Service Connect

Inform your customers on the progress of service calls with Service Connect's easy-to-use online web portal — and free up service centre resources

An extension of Service, Service Connect gives your customers access to up-to-date service call information, including history and conversations. It's an engaging service experience that empowers you to increase customer satisfaction. The benefit? They remain informed every step of the way.

Key features of Service Connect include:

- quick deployment to customers
- an intuitive, modern web interface 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 want to feel looked after. With Service Connect, they can create and track service calls in real time, allowing them to plan work-around ETAs, start direct conversations with service staff and navigate chats in an easy-to-follow timeline. They can also apply filters to find the information they need, helping them to remove distractions and act quickly.

Customers simply scan items using a device camera or upload images to receive detailed information up-front. In turn, this allows your staff to deliver faster call resolutions.

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 team 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.

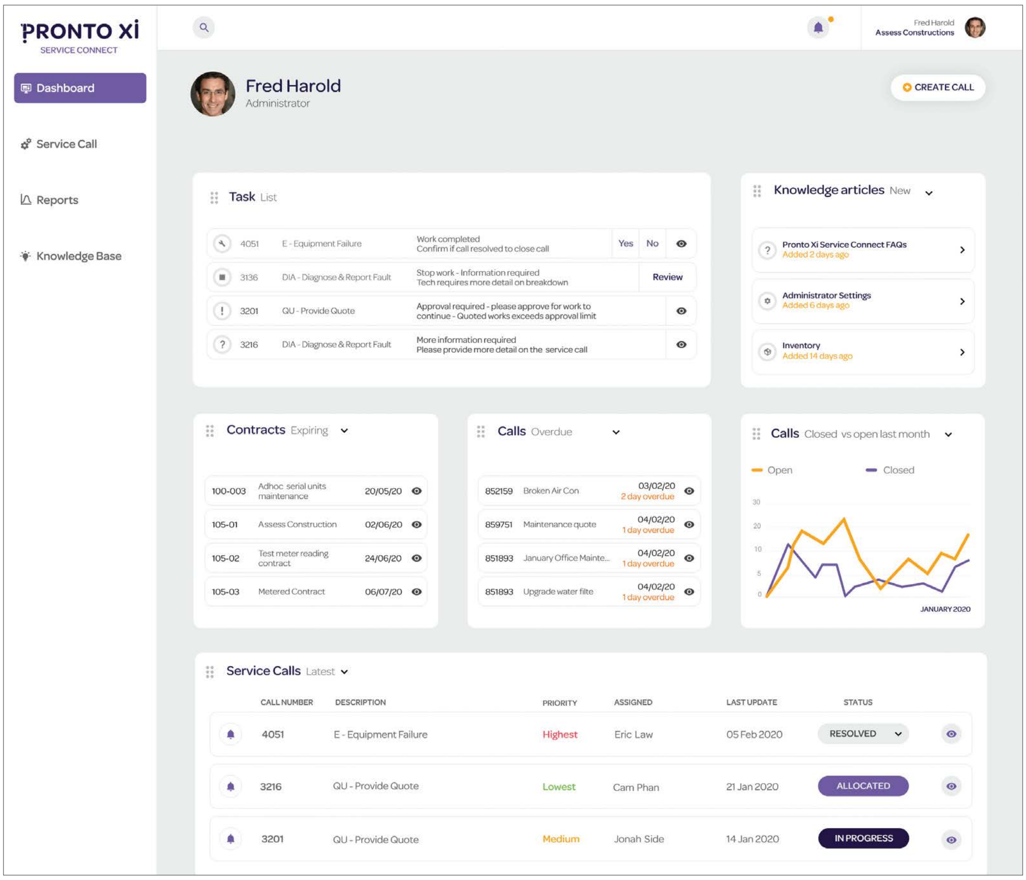
User and call management

Manage service calls end-to-end when you use Service Connect in conjunction with Pronto Xi's Resource Management and Mobile Service modules. The portal encourages your staff to spend less time managing a call or locating disparate information and more time resolving the problem.

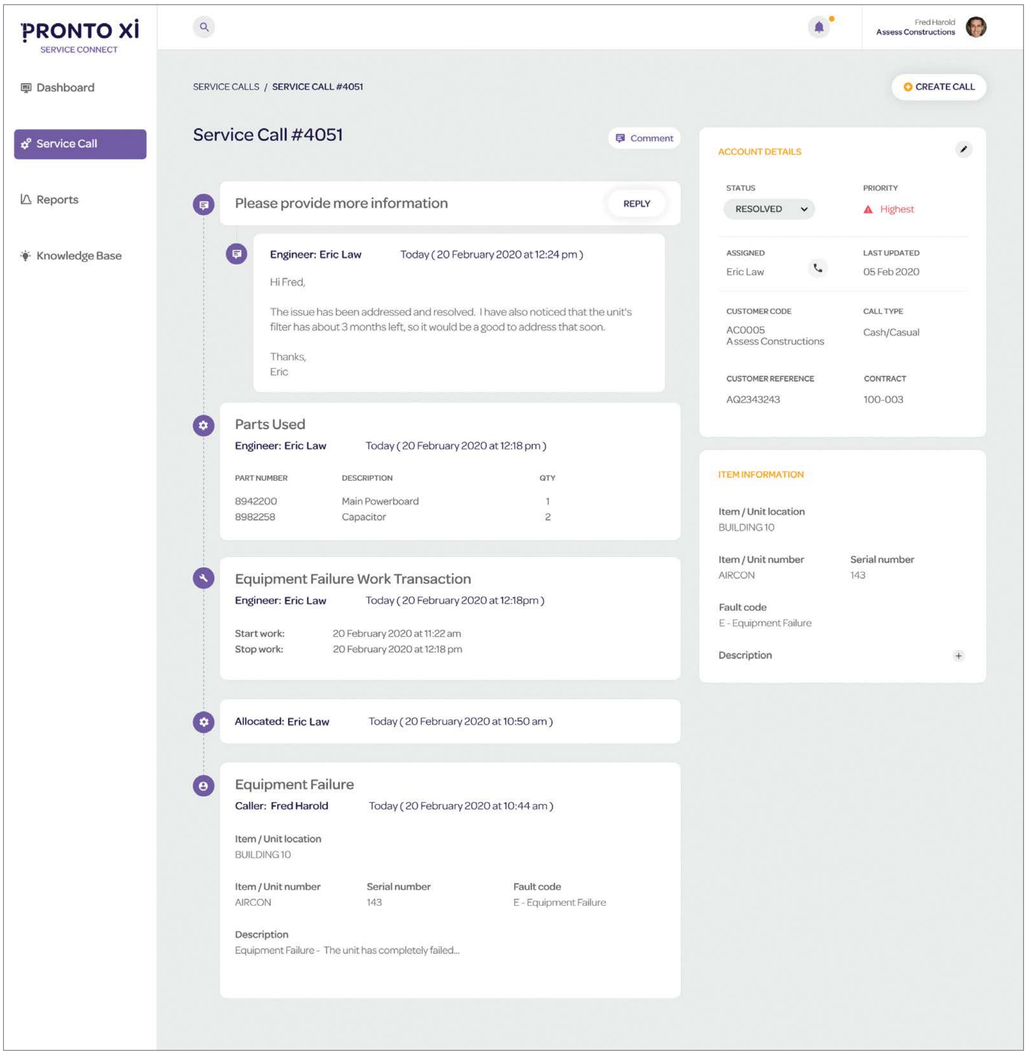
All service calls logged via the Service Connect are fully audited, allowing back-office staff to track the calls and their histories.

Service Connect enables you to associate different user types with specific roles and functions, such as:

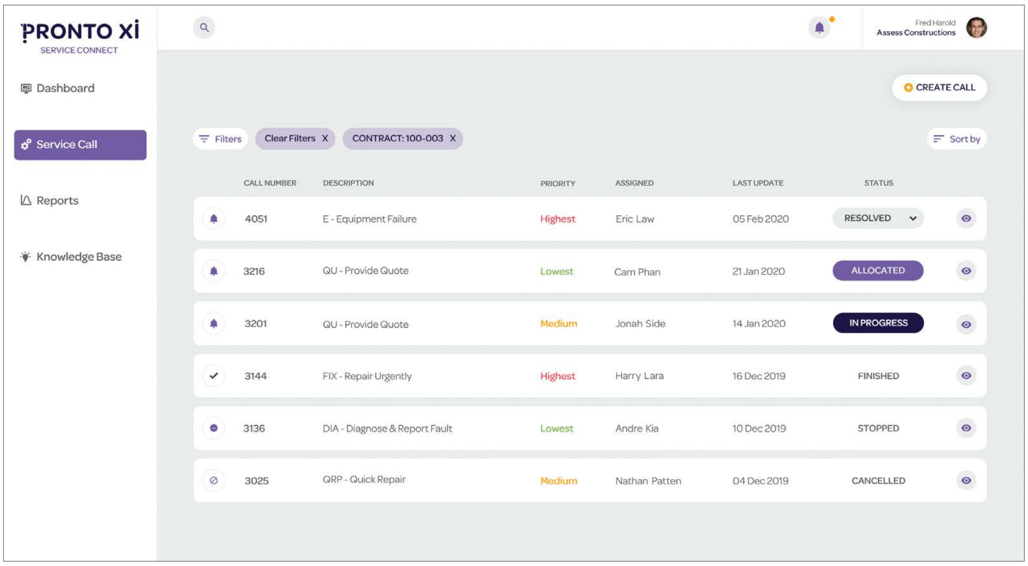
- **Service desk administrators and executive users** — These roles manage your service desk, have access to all call information and can change details on calls. Administrative users can also set up advanced configurations for forms and data fields
- **Customer users** — Your customers get a limited access account. They can see any calls their company raises and manage the work accordingly



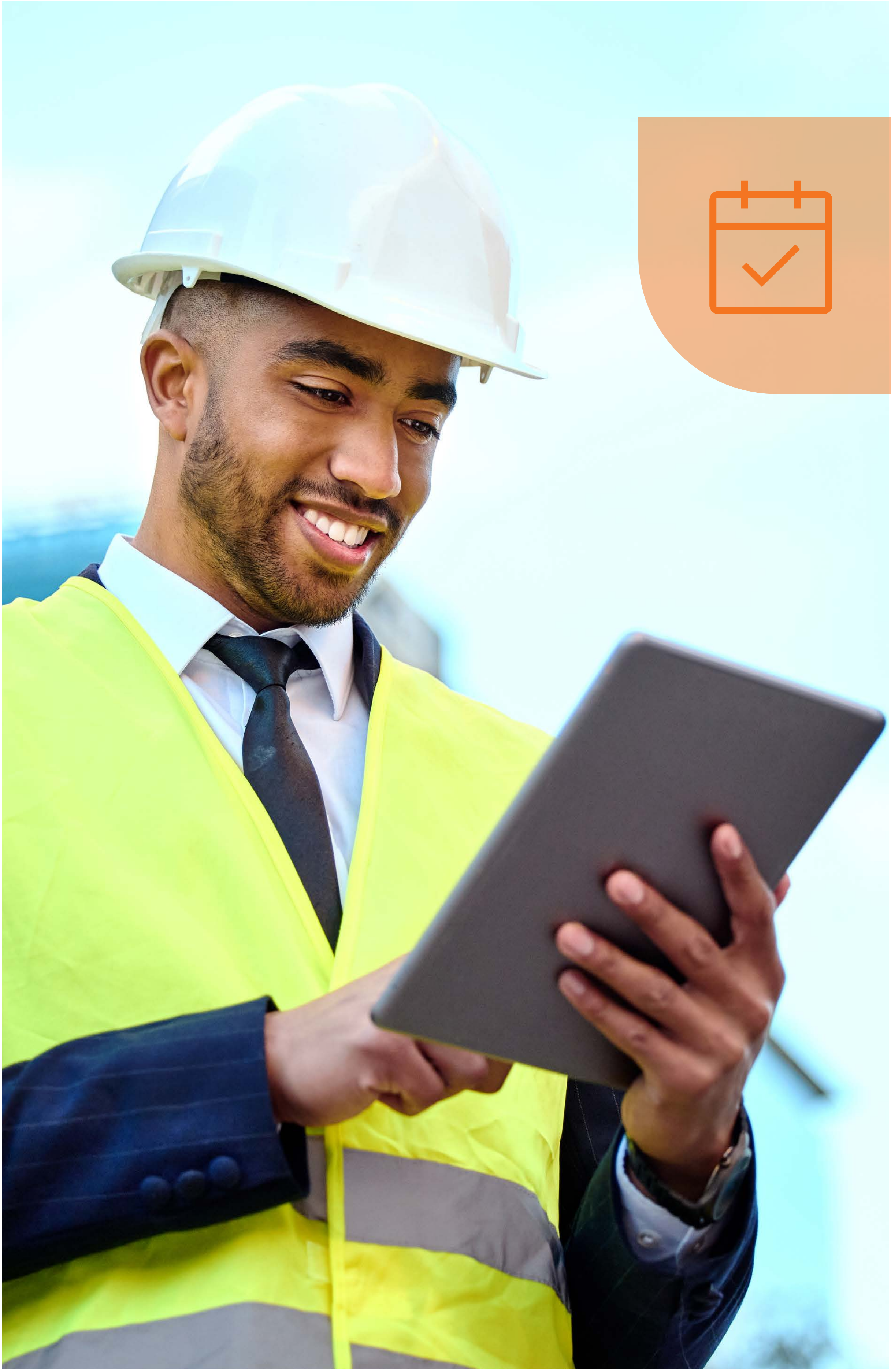
View call information via the Service Connect Dashboard



View a timeline of important milestones



See the status of individual service calls



Maintenance Management

Leverage Maintenance Management to keep your equipment in top shape, helping you reduce breakdowns and service costs, and act quickly if an issue occurs

Maximise the 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 across your facilities, giving you full control over your equipment. Swiftly spot failures, identify maintenance improvement opportunities with fault-analysis reporting and monitor repairs through the work order integration.

Key features of Maintenance Management include:

- equipment profile of parent items and components
- 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

Equipment information

Maintenance Management contains an Equipment Register that records detailed information about the equipment.

Class items as:

- **Assets** — Relates to a fixed asset
- **Components** — Relates to an inventory item
- **Levels** — Used in costing/enquiry mode, and relates plant items to each other

Identify each item by its own unique number, an identifier related to a fixed asset, or an item serial number, which helps you quickly find items and allocate maintenance details to the correct item.

The identifier can also reflect an existing equipment numbering system you already use.

Group equipment by cost centre, type and location, and categorise by equipment, assemblies and sub-assemblies.

The Equipment Register records manufacturer details and information such as the supplier, warranty date, installed costs, installation date and other associated costs. Budgets and actual costs incurred are held by plant items 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.

Preventative and predictive maintenance

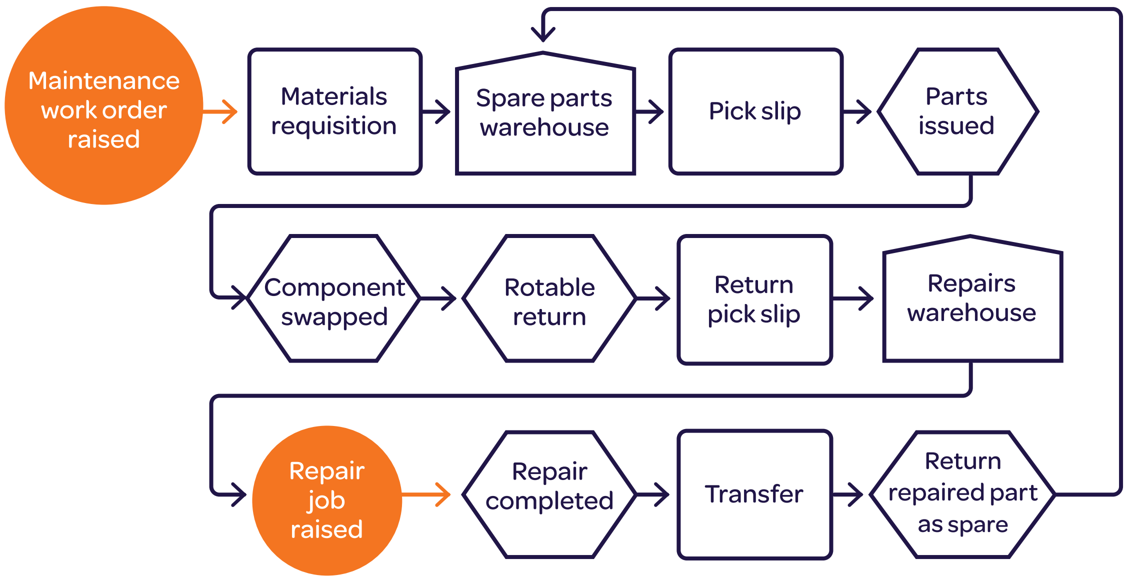
Plant managers can implement a maintenance strategy in the form of preventative and predictive maintenance tasks based on run time, condition, statutory inspection requirements or scheduled shutdowns.

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

Plant managers can also compare "scheduled" versus "actual" for both activity and costs, while full cost history reporting helps you decide whether to replace or maintain 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 lifecycle of the work order.



Workflow work orders in Maintenance Management

Returning materials to an alternative warehouse

Sometimes, you may need to return allocated materials to an alternative repair warehouse. If this is the case, change the warehouse code on the picking slip header to an alternative warehouse when you raise the return picking slip.

Component change-outs and tracking

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

A plant and equipment item may consist of several large components. For example, a truck has 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 itself, as this allows the plant item to resume production more quickly. The large or complex component can then be repaired over a more manageable timeframe or sent 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 reused. Many reconditioned components have a limited overall life, however, and will eventually be scrapped.

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

Work order management

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

A wide range of reports and enquiries are available to assist users in prioritising and planning maintenance work orders. Search for work orders based on components, related plant items, or 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 Defect status. You can then address defects, and plan and schedule corrections and maintenance tasks.

You can also estimate the hours, equipment and parts required for the task. Predefine this information on a preventative maintenance task and use it as a template for the work order.

The work order status captures meter readings, comments and actual downtime or duration and changes progressively until the task is complete.

Work order forecasting

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

Work order forecasting also allows you to generate preventative maintenance work orders when they become due. Enter planned maintenance into the system, transfer from a work request, or convert from a work order forecast.

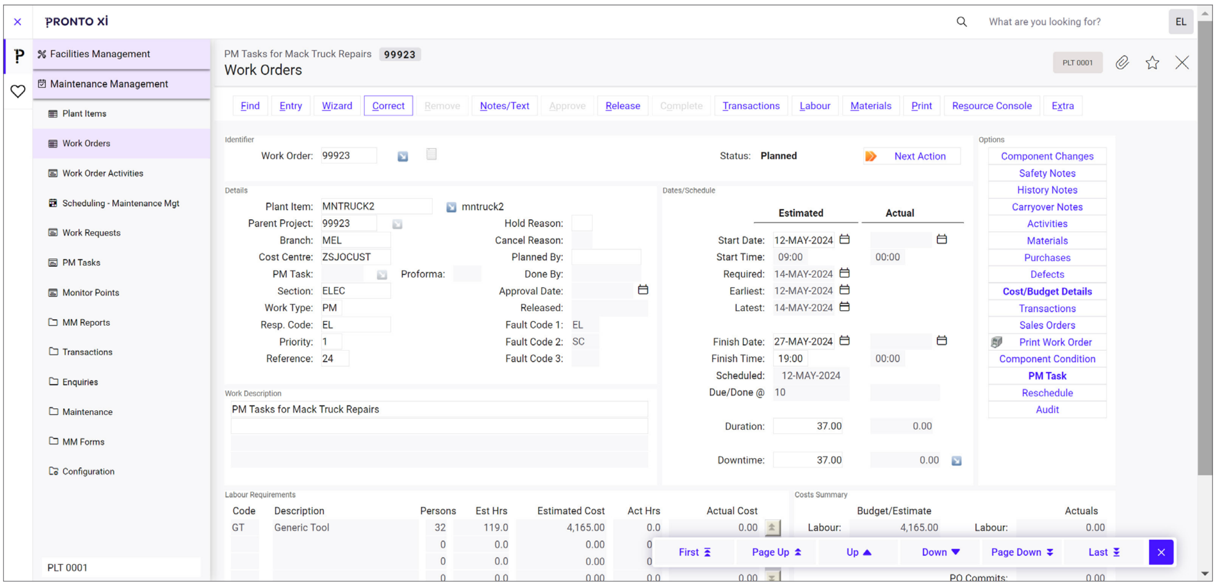
Once a work order has been generated via the forecasting process and issued to the person responsible for maintenance, it is in progress.

Work order priorities

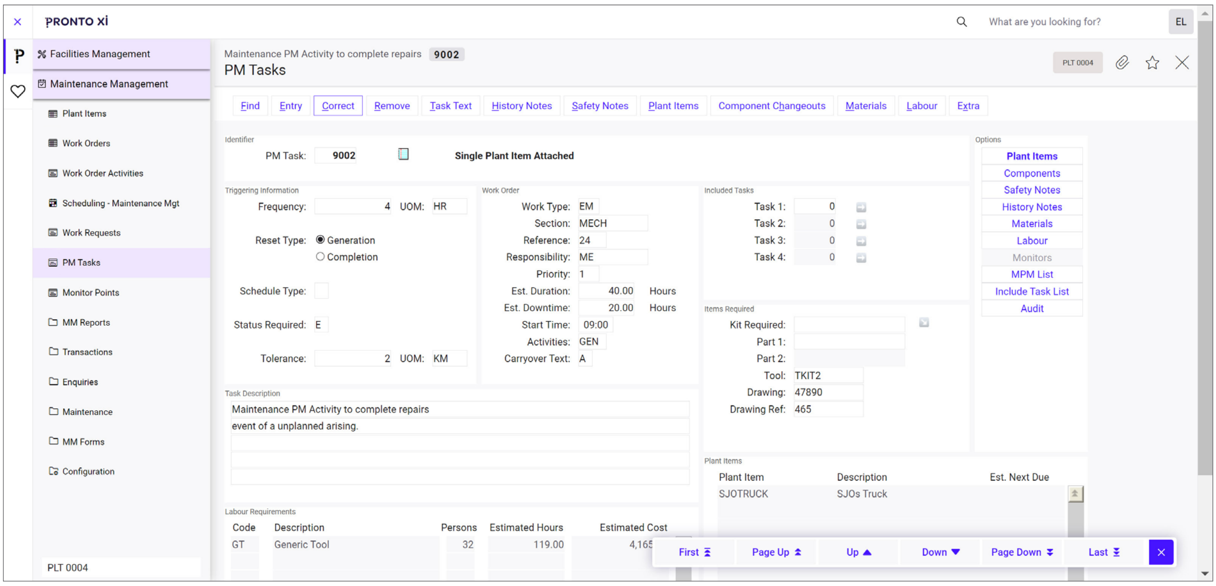
Maintenance Management supports work order classification and escalation by priority. Priority codes enable key work to be planned and executed in a timely and efficient manner.

Resource planning

Compare the predicted workload for each type of labour to the available working hours, helping you identify potential work overload.



Create and maintain work orders



Create tasks from your work orders

Resource Management integration

Maintenance Management works seamlessly with Resource Management, significantly boosting maintenance productivity.

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. Group and assign resources to work orders as a team and simplify 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.

Resource Scheduler integration

Resource scheduling is essential to service, project and maintenance management activities. Pronto Xi's Resource Scheduler enables you to meet deadlines and stay on budget, and ensures 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 is based on historical data and adjusted to anticipate bottlenecks and low activity periods, eliminating guesswork.

Inventory management

Manage 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

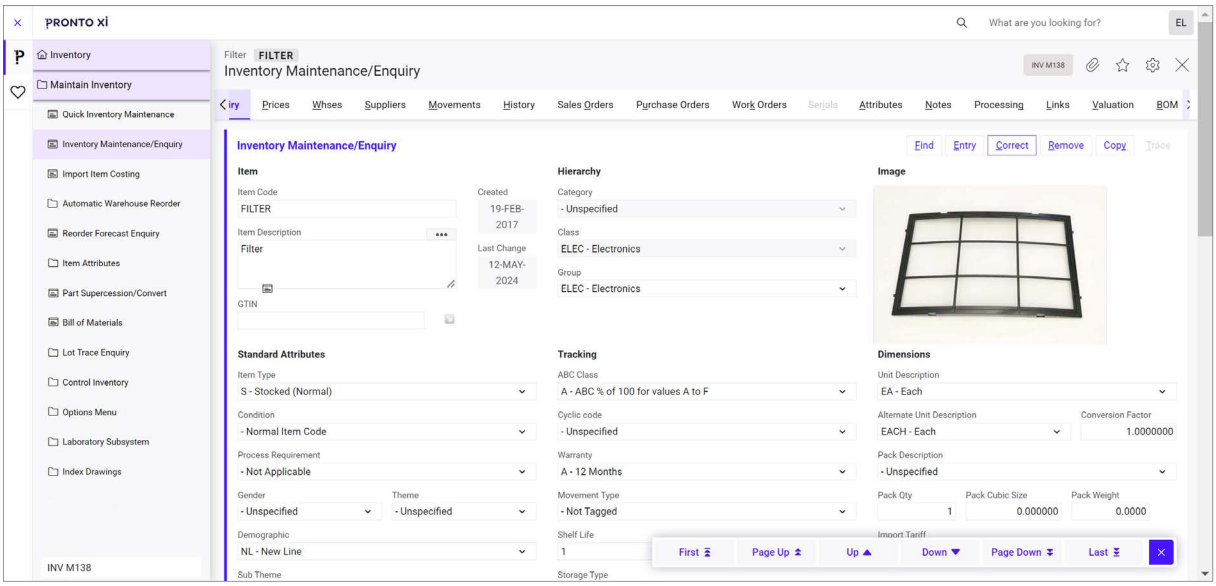
When coupled with Pronto Xi's Inventory and Purchasing modules, Maintenance Management provides optimised warehouse throughput and customer service by intelligently controlling movements of replacement parts into, around and out of the warehouse.

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 several 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 flexible criteria.

Intelligence

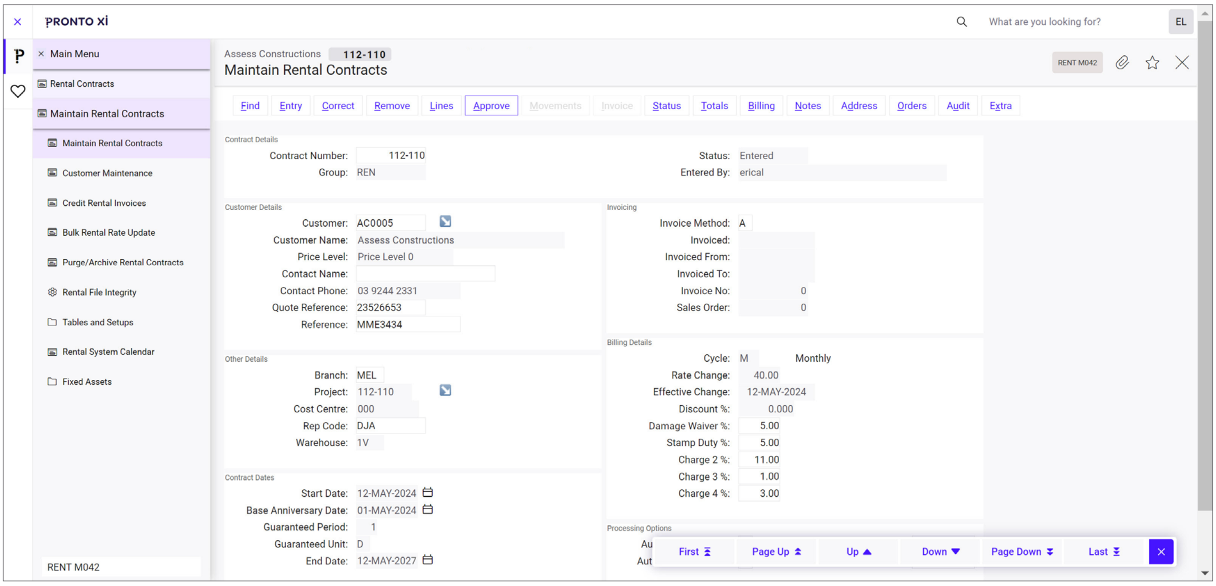
Perform deep analysis of key aspects of maintenance management effortlessly using Analytics Dimensions. A pre-built hierarchical data format allows intuitive analysis of plant items, work orders and work order transactions using drill-up and drill-down navigation.



View and enter detailed information about an inventory item

Rental

Track rental contracts with Rental's fully integrated, flexible system



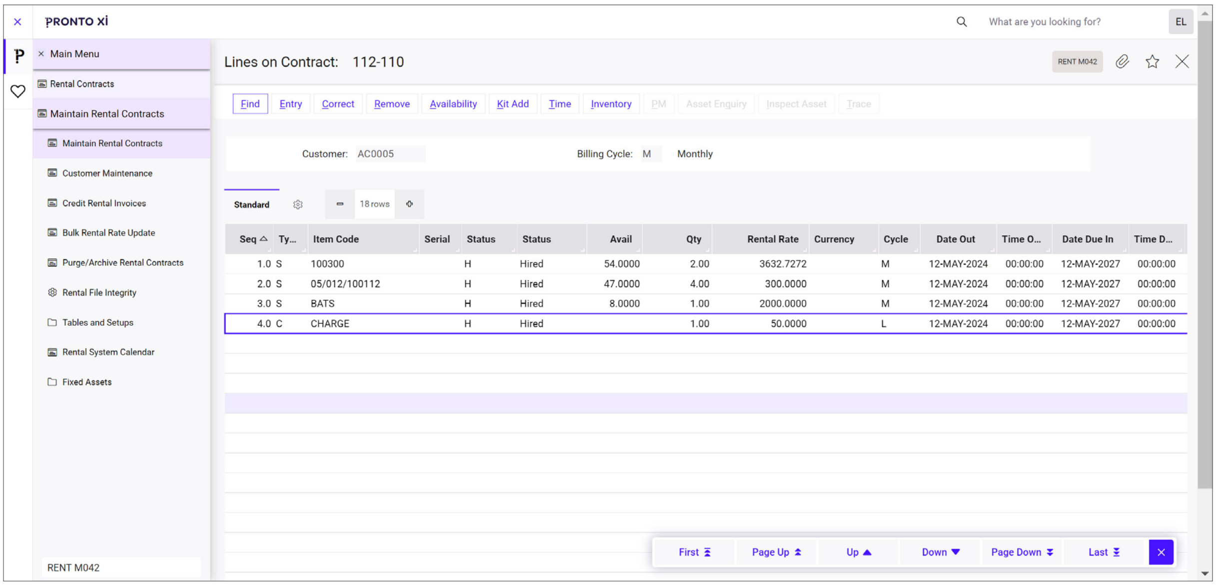
Create and maintain all the details of a rental contract

Rental uses your rental contract with your customer to define 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 features of Rental 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 creating a rental contract, you can add a percentage value for stamp duty and damage waiver. Create reminder notices when invoices are overdue and archive all customer correspondence within the contract notes.

Rental offers the flexibility of multiple billing cycles. Elect to charge a deposit, invoice immediately or later, and control the billing of items in a contract.

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

Rental integrates with Pronto Xi modules, such as Project and Service, which means you can attach and post all revenue from a rental contract to a project and schedule the preventative maintenance of your equipment.

Rental is fully auditable and allows you to define the functions each staff member can access.

Charges

Any extra charges — for example, to a physical item, an attached service such as transport or installation, or a cost incurred — associated with the unit rental links to a unit on the contract line. Charges terminate from the contract at the same time the unit is terminated.

They can also be periodically invoiced or charged as a lump sum on the first invoice.

The charges appear as 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, which assigns the fixed asset to the serial number of a rental unit, allowing you to depreciate costs of the unit.

Contract invoicing

Easily manage customer invoicing 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 for billing in accordance with the billing cycle set out in the contract. Depending on the agreement, billing takes place in arrears or in advance.

Depending on your accounting requirements, you can raise a General Ledger journal when an invoice is raised. It recognises the value of the unearned income as a liability, which reduces 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 efficiently raises credit invoices for either a partial bill cycle or the last invoice previously raised.

A comprehensive credit process allows for individual contracts or bulk crediting if required. Alternatively, an outage 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, you can raise "one-off" invoices when a contract is approved, an item is terminated from the contract, or a contract is terminated.

This allows you to adjust the initial and final rental invoices using the sales order functionality.

Billing cycle

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

Pronto Xi caters for rental cycles that exclude specific periods, such as when weather conditions make hiring out equipment impossible. Invoice for a seven-day week, a five-day week, or any required combination.

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. Add or remove units from the contract, and include appropriate adjustments on the next invoice.

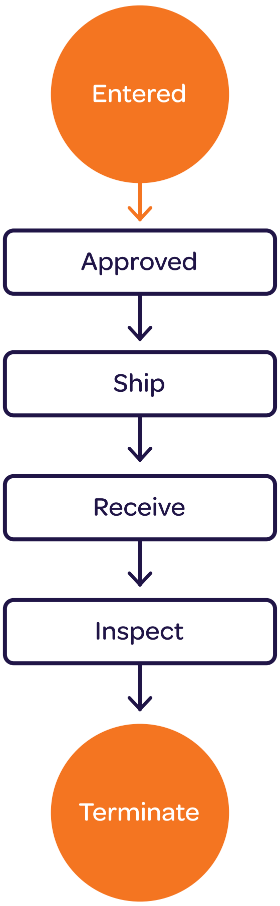
By selecting the contract number and the customer code, recurring invoices can be produced in bulk for a set of contracts. Each invoice is posted directly to the General Ledger and the customer's account.

Payment reminders

Overdue payments trigger a reminder notice. The contract automatically updates with notes regarding the reminders.

Tracking

Rental allows full serial tracking of items. Produce rental invoices and trial balances at almost any time.



Stages of a contract lifecycle

About us

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 45 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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