PRONTO Xi

Applications Overview

CRM

The extra mile

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The extra mile

Make every customer interaction count

Pronto Xi's fully integrated Customer Relationship Management (CRM) modules puts your customers first, and drives customer acquisition, retention and satisfaction.

Pronto Xi CRM enables you to analyse customer and prospect needs, identify important customers, pinpoint the business processes that deliver superior customer service and promote repeat business.

Track leads, opportunities, transactions and activities across all accounts and contacts, and get detailed insights on every prospect and customer. With attributes, you can flexibly add powerful data points to identify and segment CRM data.

In turn, use the data you collect on your customers to assist with Salesforce automation, customer service and support, and marketing opportunities.

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

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

Pronto Xi CRM

Maintain and strengthen your customer relationships, from new leads to long term partnerships, with Pronto Xi CRM

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

Analyse customer and prospect needs and quickly identify the customers requiring the most attention. Discover the best business processes to drive customer satisfaction and encourage repeat business.

Advantages of Pronto Xi CRM include:

- a single point of reference for CRM functions, helping you to manage a pipeline
- the ability to store and manage unlimited customers, prospects and companies
- tools to create, track and qualify leads, and convert leads to opportunities
- the ability to easily access and analyse detailed sales information about your customers and prospects
- improved time management, with records of interactions and simple scheduling of sales activities, synchronised with Microsoft Office, Microsoft 365 or Google Workspace
- the capacity to easily track marketing efforts, with dynamic updates of all activity and key information available at a glance
- the ability to centrally manage your customer data across a group of companies
- partnering with Vision6, an SMS and email marketing platform

Pipeline

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

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

Performance metrics

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

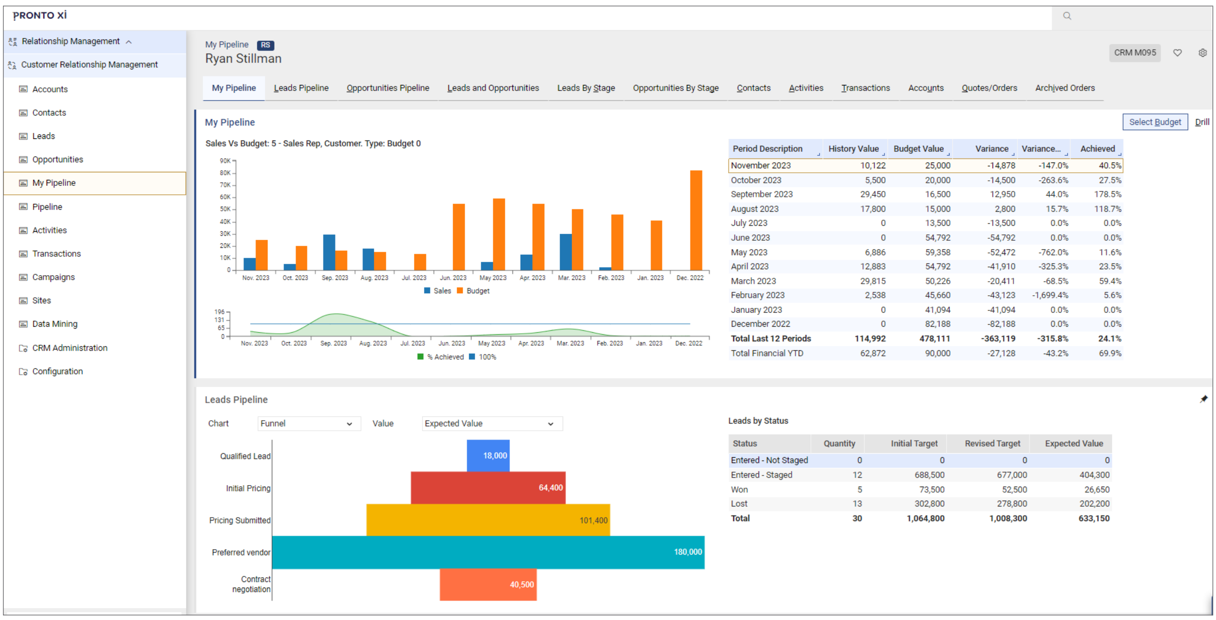
- number of leads and opportunities
- number and opportunity value of quotes in the pipeline
- value of leads by stage
- value of leads and opportunities by the top representatives in the business

Address book and contact manager

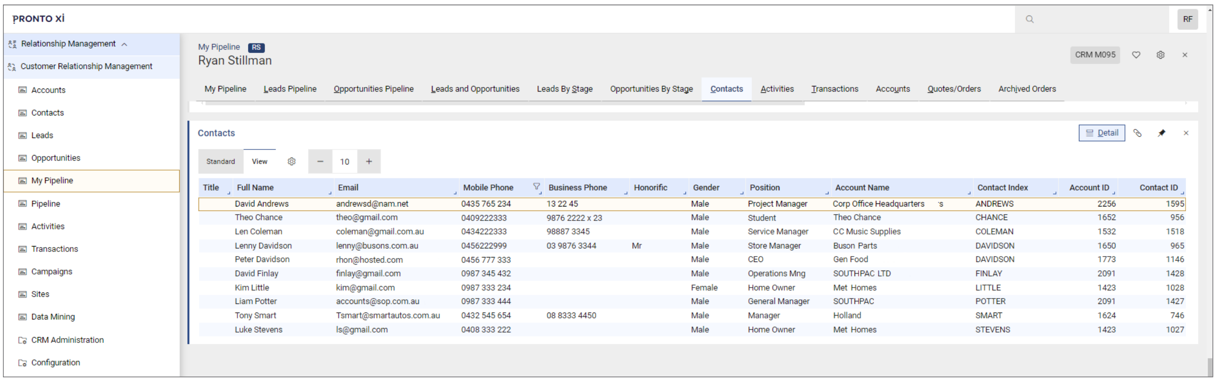
Pronto Xi CRM centralises day-to-day customer management, giving you streamlined access to all of Pronto Xi's customer-related functionality. The module's intuitive screen displays vital customer information, including the date of the last sale, last mail-out and next action date.

Categorise and access information about an unlimited number of customers, prospects and companies. Address book and contact manager features include:

- **Organisations** — where the company is a current customer, Pronto Xi sales enquiries are available directly from the CRM's main screen, giving your team all the historical and status information they need without having to access Accounts Receivable
- **Contacts** — store information, such as email addresses, mobile phone numbers, home phone numbers and position descriptions, for an unlimited number of individuals or contacts in each organisation
- **Security** — several security masks are built into the main screen to restrict customer modifications to authorised users
- **Parent/Child** — links together multiple related companies to give you a view of holding companies or departments with multiple subsidiaries



Visualise sales versus budget and the opportunities pipeline



Display accounts and contacts on screen

Attributes

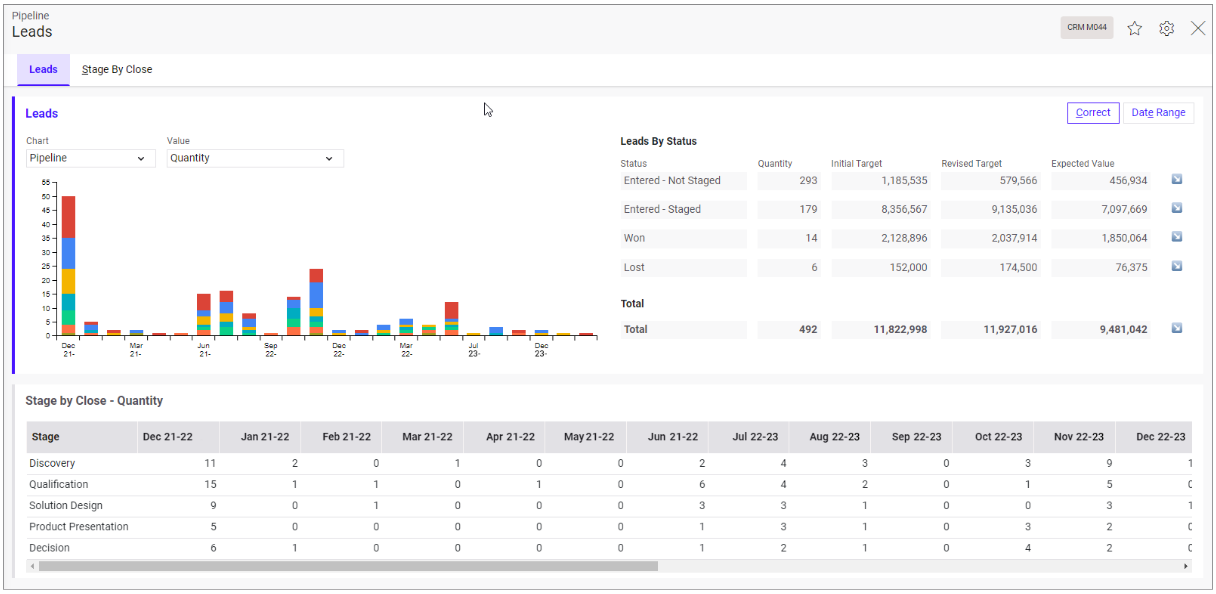
Attributes define and manage customer characteristics so you can analyse your customer database and maximise sales opportunities.

Track the number of staff, sales turnover, competitors' details, customer interests, item groups or competitive advantages. You can also create attribute groups for hierarchical management.

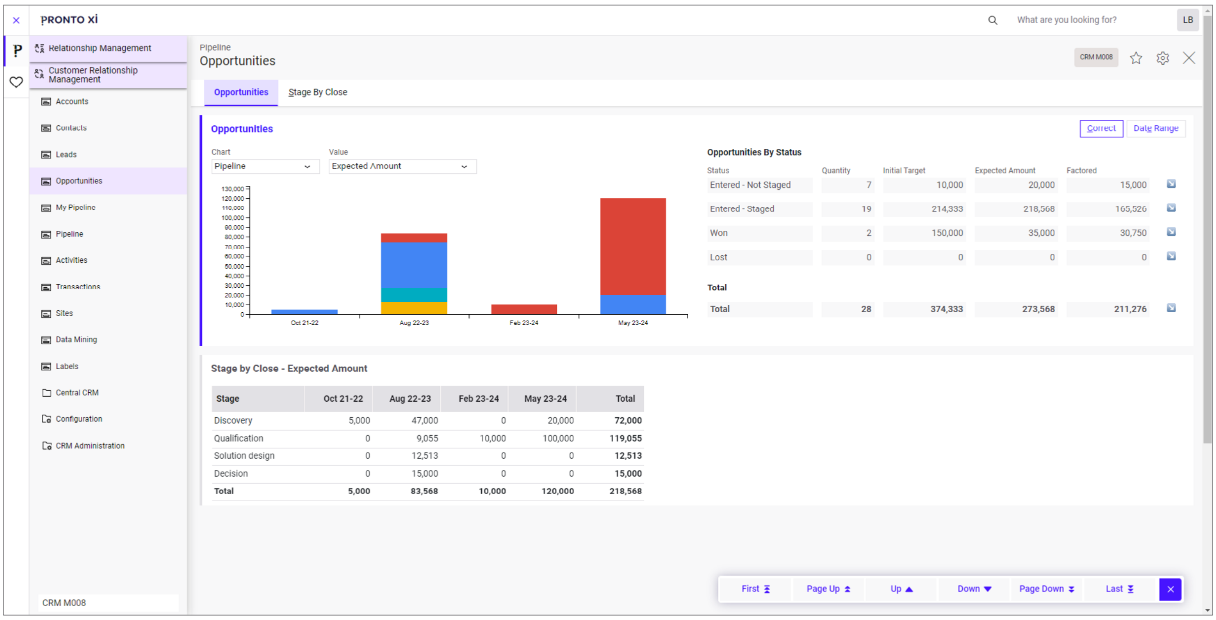
Assign a number of attributes to each company or contact. Attributes can also store more than one value under a single attribute, making information such as user preferences — which often have more than one value — easier to retrieve.

Apply contact-specific attributes independent of company-level attributes. Attributes can be optional or mandatory, delivering an automatic prompt for key information when you create a new account.

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



Gain a clear understanding of your leads with integrated visualisations



Use integrated visualisations to view opportunities

Sales management

Leads

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

Multiple contacts from a company can be selectively associated with new leads. If the contact already exists in your database, remove duplicate entries or keep them separate, depending on your requirements. You can also convert qualified leads to opportunities while maintaining all transactional history.

Opportunities

CRM Opportunity Management tracks the position and quality of each opportunity, giving you a clear view of the sales potential and allowing you to access information quickly.

Easily access specific contacts from CRM accounts, and search all transactional information and activity entries from a single interface.

In high-volume quoting environments, create greater control over the sales process by generating “opportunity quotations”. This unique facility quarantines quotations inside an opportunity and selectively converts them to “live” quotations or sales orders. You can also manage expected revenue by applying probability factors.

Pronto Xi integration

CRM integrates with our Pronto Xi Enterprise Resource Planning (ERP) solution, providing you with a "single source of truth" across your operations.

When interacting with customers, this functionality enables your staff to:

- view up-to-the-minute transactions and account notes
- view current sales orders, including processing status such as picking slip printed and order invoiced
- view and quote special pricing, quantity discounts or any other unique attributes
- view current inventory details and purchase order details, including expected arrival dates
- automatically write a record in Accounts Receivable when creating a customer in the CRM
- view the customer's credit status or any special conditions maintained within Accounts Receivable
- link to other relevant functions in Pronto Xi; for example, service-based organisations can link to service calls of account customers managed in the CRM

Quotations and sales orders

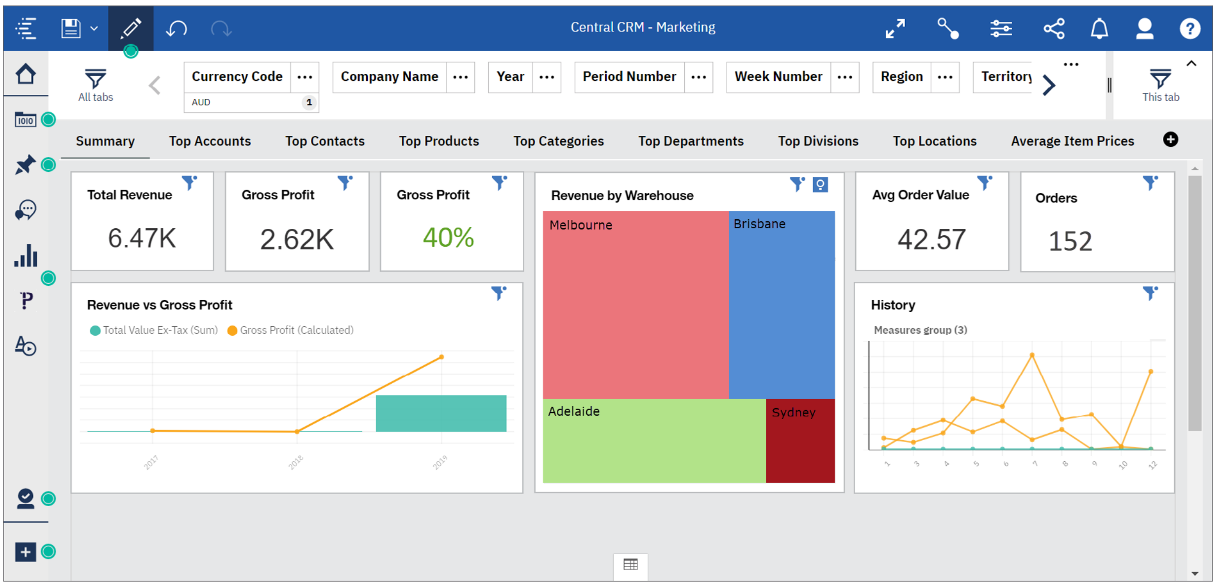
When a customer requests a quotation, it can be entered against a company. If the quotation is accepted, it converts to a sales order and a basic (cash on delivery) customer account is automatically created in Accounts Receivable. Security restrictions may apply.

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

Link quotations to specific sales campaigns, and record and analyse unaccepted (lost) quotations.

Customer and sales views

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



Get a performance snapshot with the Central CRM sales dashboard

Multi-company CRM

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

Customer data automatically synchronises between companies, avoiding duplication and reducing time spent in manual data consolidation. It means customers won't need to repeat information if they are doing business with another company in your group.

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

Transactions

Transaction manager

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

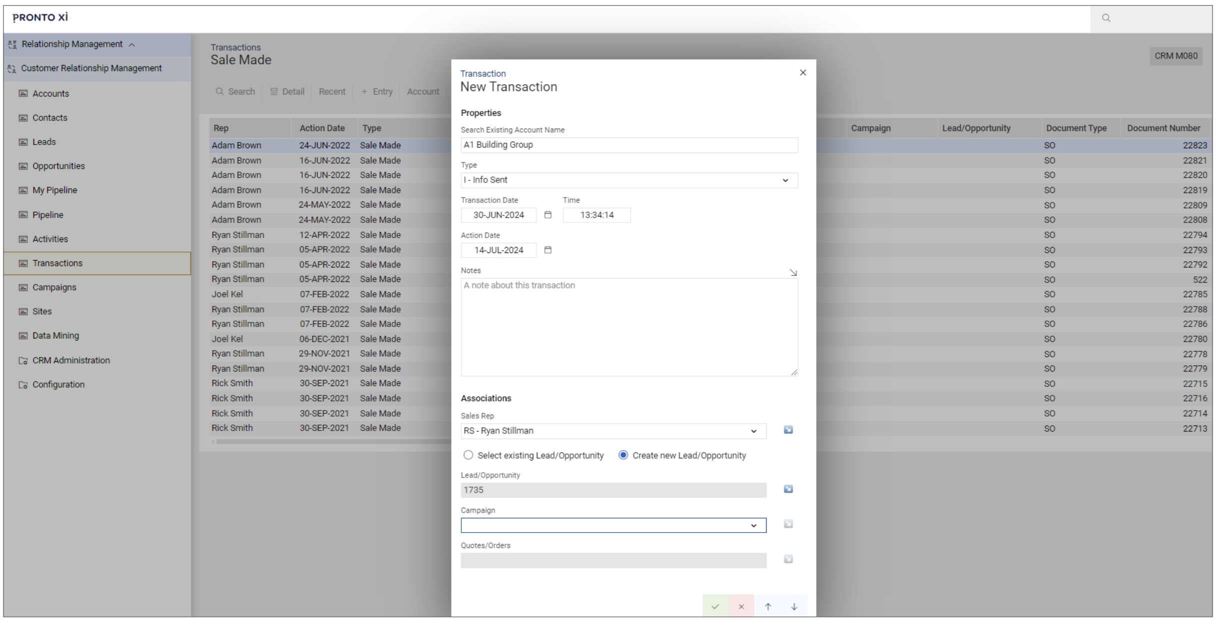
Record each transaction using a representative code and a login name so you can follow an audit trail if needed. The data grid displays the transaction date and time, campaign, transaction type, response type, action category, target date and actual date, allowing you to view exactly what happened at a given point in time.

Letters, emails and labels

Pronto Xi's Send Info option easily generates personalised letters or labels using the mail merge function in word-processing applications, such as Microsoft Word.

Create templates for direct merging from the CRM, and merge sales orders and quotation data into templates. Send emails with attachments to multiple accounts and contacts.

When you use the Send Info function, transaction entries are written against the relevant CRM accounts.



Record interactions with your customers and prospects

Notes and attachments

Notes

With the Notes function, you can record, search and filter notes by type against CRM accounts.

Attachments

Attach all file types to individual contacts or companies in the CRM.

You can also access images and documents related to a customer or prospect within the CRM.

Integrated search

Locating accounts, contacts and information via a keyword search or phone number is simple. Obtain critical information in just a few keystrokes to quickly access an account's details.

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

If you can't find a single direct match, Pronto Xi will list all accounts that match the input criteria. You can then select the appropriate account from the suggested list.

Integrated data mining

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

Filter prospect and customer information using various selection criteria, and go on to produce reports and mailing lists.

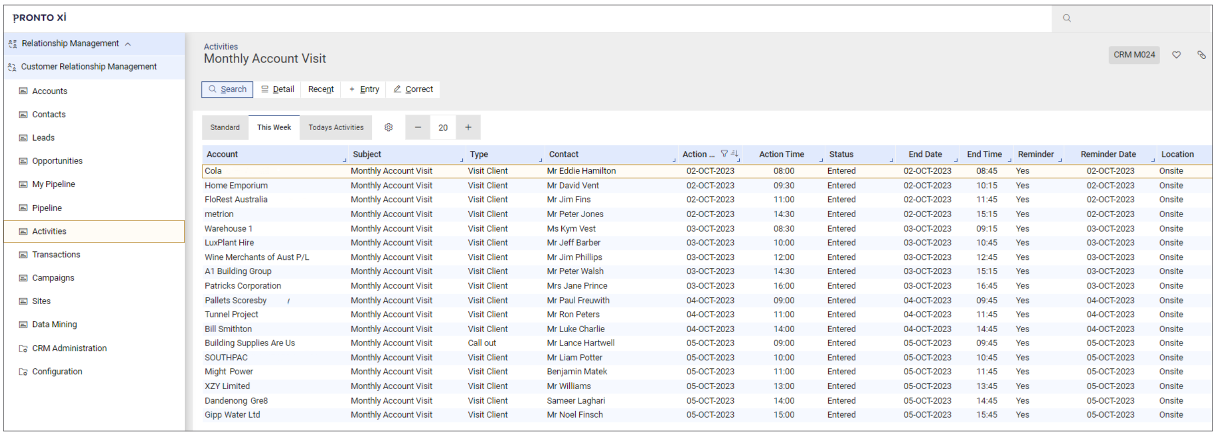
A range of attributes form part of the selection criteria and can be combined into complex logical expressions. Further refine the selection criteria of each list using the Keep/Drop option.

Activities

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

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

Pronto Xi's mail server integration also allows you to synchronise activities to an external calendar.



View all upcoming activities or filter them to show urgent or due tasks

Campaigns

The CRM Campaign functionality manages and tracks campaigns or events, as well as the performance of each representative.

Link sales transactions, quotations, correspondence and activities to any campaign. Pronto Xi CRM stores campaign statistics, enabling you to measure campaign success against the budgeted cost and expected revenue.

Web map links

Pronto Xi CRM links to web-based map data. Click on the relevant map link in the CRM screen to quickly and easily obtain a map or driving directions from servers such as Google Maps.

Mail server synchronisation

Synchronise your CRM data with cloud-based business applications like Microsoft Office or Google Workspace. This improves productivity, promoted data capture and increases CRM acceptance in your business.

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

The synchronisation ensures the consistency of information across your enterprise and boosts adoption through familiarity.

It also supports:

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

SMS and email marketing

Our partnership with Vision6 enables Pronto CRM users to leverage superior mailout capabilities. Synchronise your Pronto Xi CRM contacts with Vision6 to facilitate and improve marketing performance.

The benefits of Vision6 integration and some of its features include:

- Creating email campaigns that look beautiful on any device with a class-leading email designer
- Sending powerful promotional or transactional emails with automation and personalisation tools
- Boosting engagement with SMS marketing
- Growing leads with Web Forms
- Improving ROI with real-time reports
- Knowing that all data is stored locally in Australia, with a Data Centre that is ISO 27001 compliant
- Getting local support when needed

Pronto Sales App

A good business relationship is about open communication and responsiveness. Pronto Sales App is an essential business tool, giving your staff the information they need, wherever they are

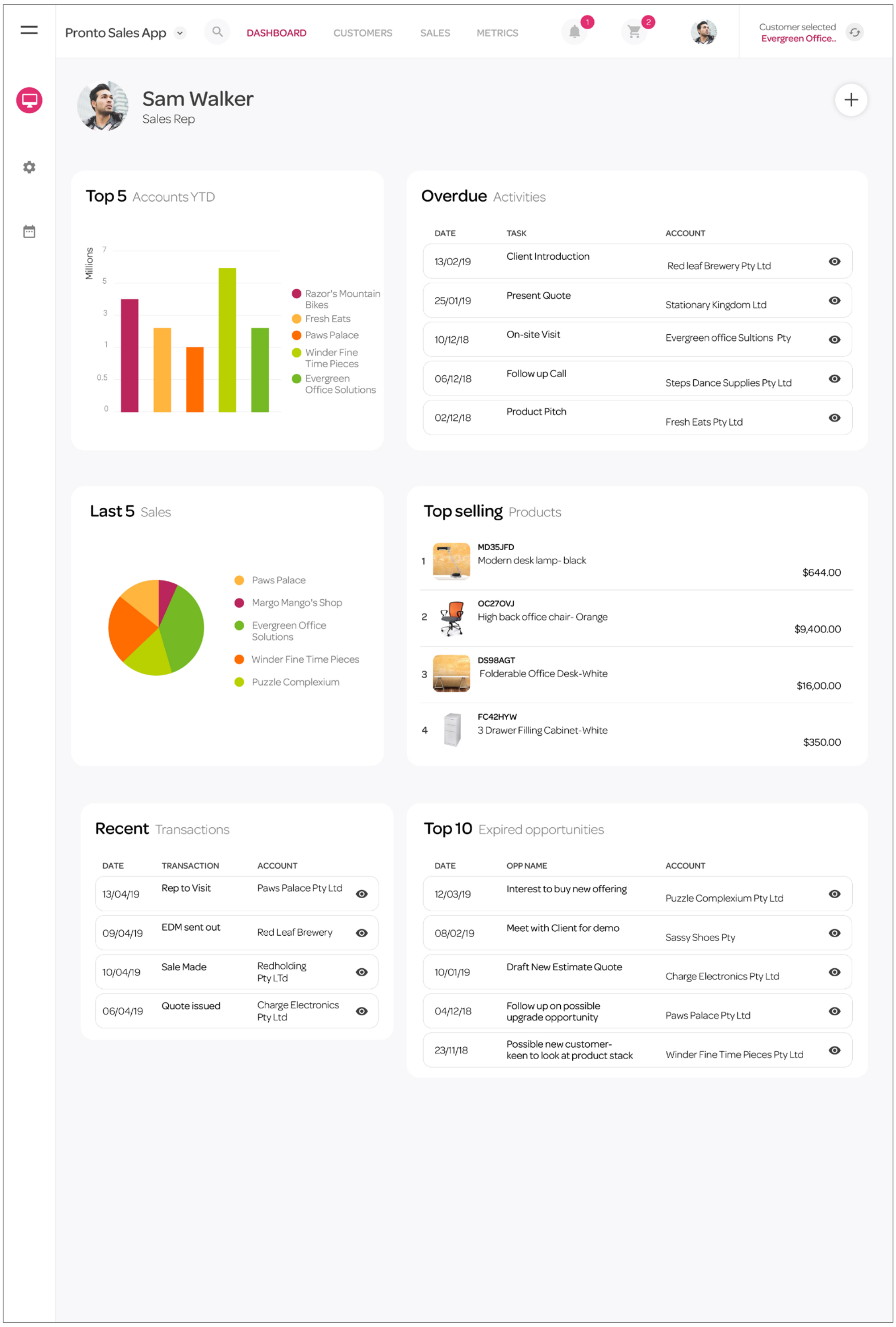
Pronto Sales App is the ultimate companion for sales professionals on the move. Innovative and intuitive, it's accessed via a responsive web-based portal, and is simple to deploy and use.

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

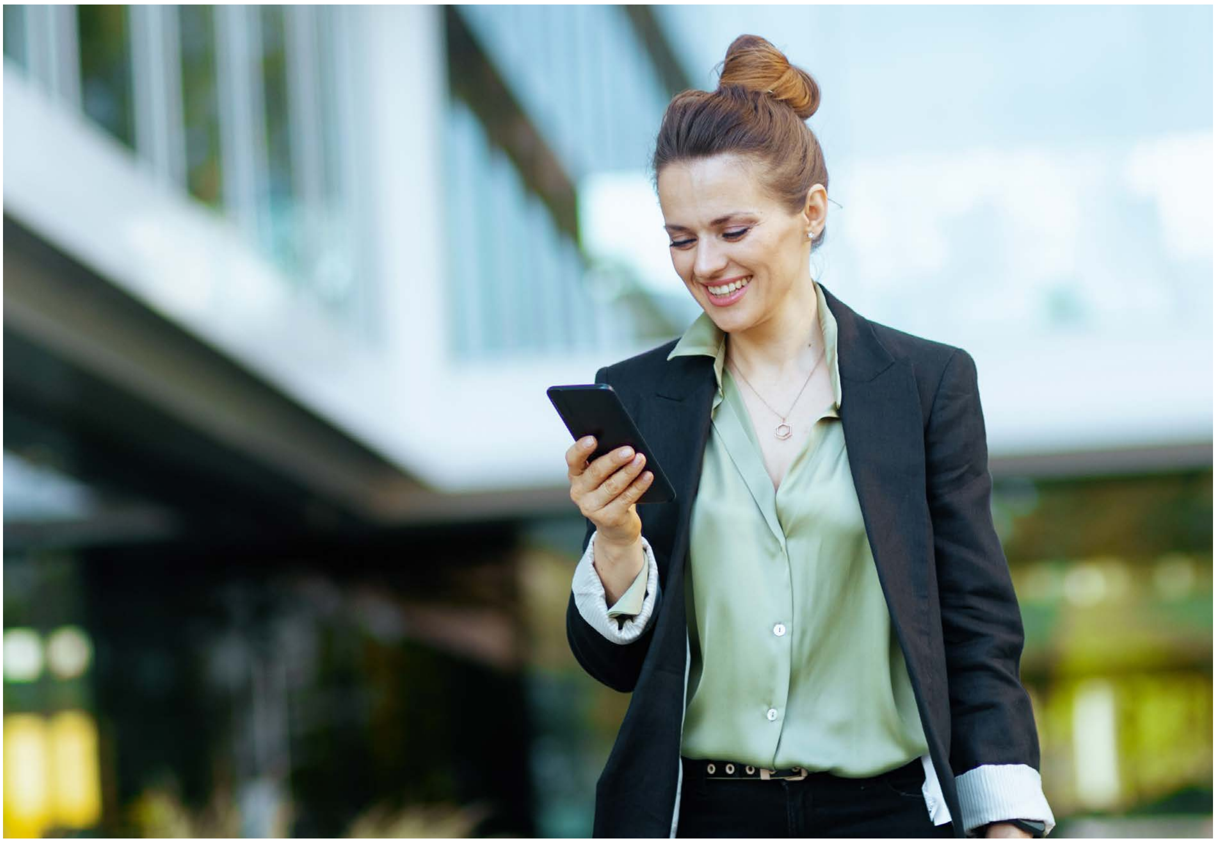
Through its advanced business-to-business capabilities, Pronto Sales App makes it easy to enter sales orders or quotations that adhere to business standards and controls, such as credit limits, product restrictions and customer-specific pricing.

Representatives can apply their own company-approved price overrides to get a deal over the line. They can also review outstanding orders and balances, helping to deliver a well-rounded and informed service to their customers. Pronto Sales App supports shopping cart and payment gateway features so representatives can process sales and take payment on the spot.

Representatives can link in-progress sales orders to deals in their pipeline, arming them with the information they need to meet their sales objectives. They also have access to dashboards that give them a quick understanding of their top clients, products and prior sales, and their sales progress.



Review sales activity at a glance with the Sales Rep dashboard



Mobile access

With a mobile-first responsive design, Pronto Sales App provides all the functionality of a desktop sales CRM on a smartphone, allowing your representatives to manage customer relationships and sales on the go.

Activities, contacts, accounts and deals are just a tap away. Representatives can access up-to-date information on their deal before they step into a sales meeting, then schedule follow-up activities and update details as they walk into their next appointment.

Customer details

Closing a deal starts with knowing your customers. Pronto Sales App allows your representatives to capture personal details and conversations with interested contacts or accounts, then use this information to track deals in their pipeline to conversion.

Representatives can also use the Timeline View to see customer details and scheduled activities or appointments, using the data to fill their pipeline.

Product information

An extensive product range has its challenges — it can be difficult for representatives to know which products are suitable for clients. At the same time, business silos can make it challenging to manage inventory information.

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

Sales performance

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

Order creation

Pronto Sales App incorporates tools that allow representatives to quickly generate orders based on item codes, rather than keying in search terms. This saves time and allows them to focus on building relationships.

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

Order history

With full visibility into a customer's order history, Pronto Sales App enables representatives to facilitate conversations that lead to repeat purchases and gain insights into fluctuations in order quantities.

With account aging information readily available, representatives can also oversee customers' unpaid invoices or unused credits.

Pipeline management

Pronto Sales App manages all your deals in one view, giving you total visibility into your pipeline.

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

By providing a clear visual of the current status of deals and next steps, the pipeline helps to focus your representatives' efforts, keeping actions organised and in line with your business objectives.

Activities

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

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

Deal management

Add contacts and product information directly to opportunities to create one informative view of a deal.

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

Sales engagement tracking

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

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

About us

PRONTO SOFTWARE

We are an Australian developer of award winning business management and analytics solutions. Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That's why for more than 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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