

PRONTO xi

Applications Overview



Service

Part of the Asset & Facility
Management application

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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:

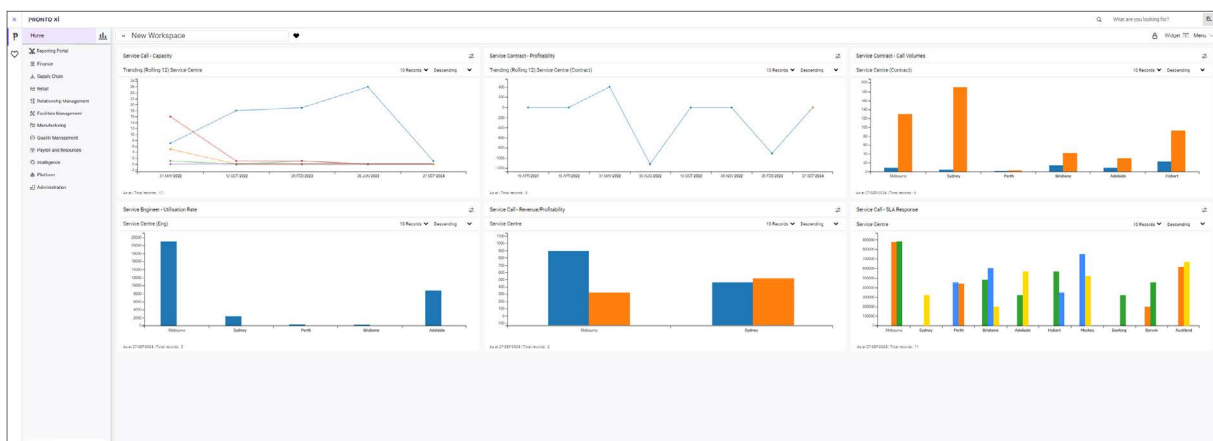
1. contract level
2. unit level
3. contract level with voucher numbers recorded

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.

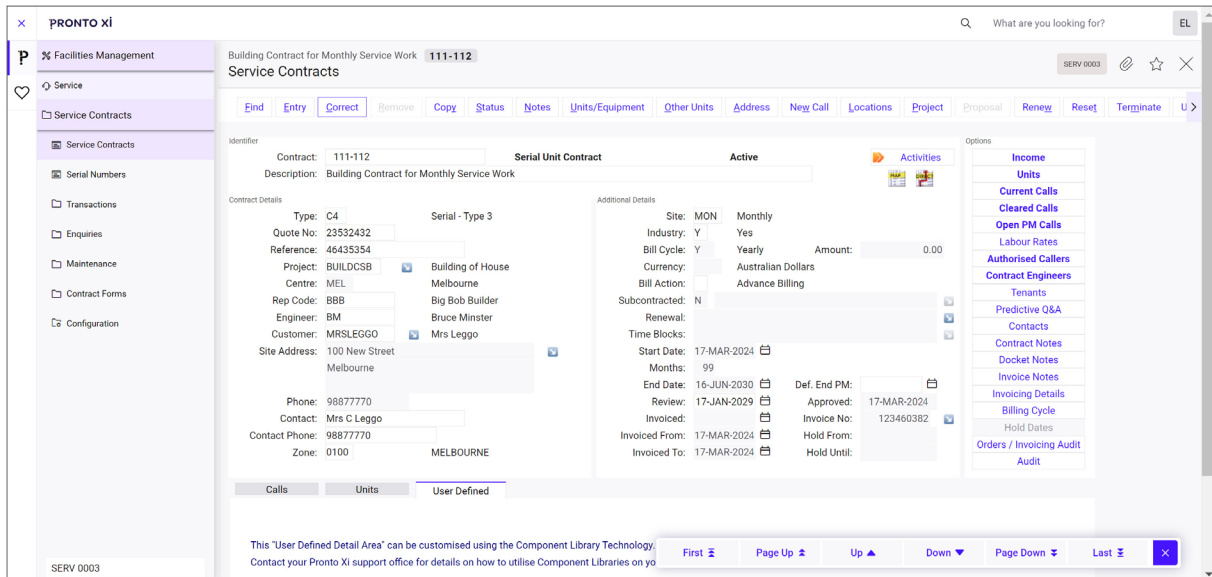
Contract invoicing

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



The screenshot displays the PRONTO Xi Service Contracts interface. The left sidebar shows a navigation menu with options like Facilities Management, Service, Service Contracts, Serial Numbers, Transactions, Enquiries, Maintenance, Contract Forms, and Configuration. The main area shows the details for contract 111-112, including contract details, additional details, and a right-hand options menu. The contract details section includes fields for Contract, Description, Type, Quote No, Reference, Project, Centre, Rep Code, Engineer, Customer, Site Address, Phone, Contact, and Zone. The additional details section includes fields for Site, Industry, Bill Cycle, Currency, Bill Action, Subcontracted, Renewal, Time Blocks, Start Date, Months, End Date, Review, Invoiced, Invoiced From, Invoiced To, Def. End PM, Invoice No, and Hold Until. The right-hand options menu includes links for Income, Units, Current Calls, Cleared Calls, Open PM Calls, Labour Rates, Authorised Callers, Contract Engineers, Tenants, Predictive Q&A, Contacts, Contract Notes, Docket Notes, Invoice Notes, Invoicing Details, Billing Cycle, Hold Dates, Orders / Invoicing Audit, and Audit.

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.

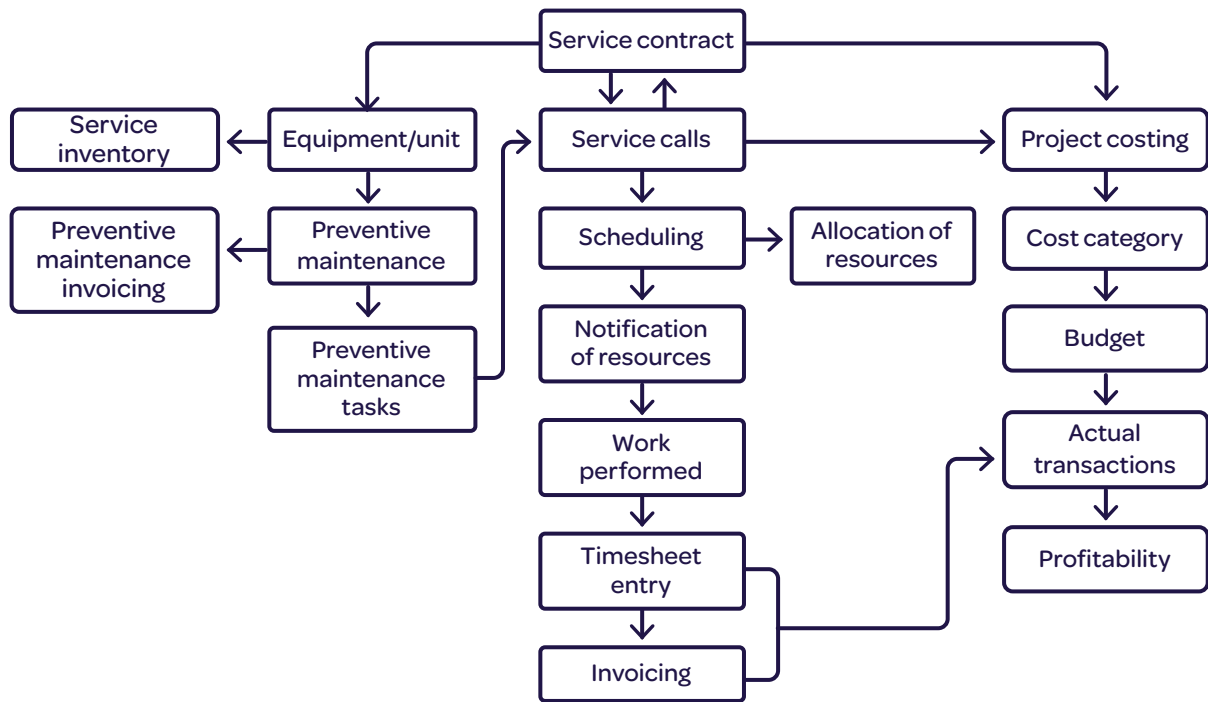
Renewals

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

Engineer/Equipment	Type	Description	Service Centre	Schedule Date	Start Time	Time Allocated	Stop Time	Notified	How	Team Code
AF	Engineer	Aaron FINCH	MEL	12-MAY-2024	15:00	1.00	16:00	Y		
BD	Engineer	Brad Pitt	MEL	12-MAY-2024	12:00	2.00	14:00	Y		
RSC	Engineer	Joe BLACK	MEL	12-MAY-2024	11:46	3.00	14:46	Y		

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

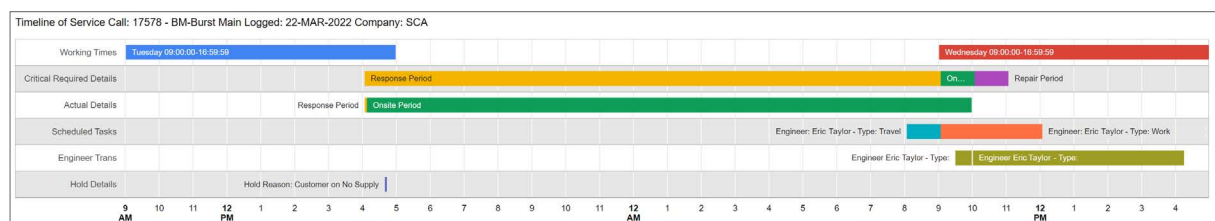
Service calls are usually logged in a service centre, which may be a workshop where the service work is conducted, or a centralised base that monitors service calls and distributes them to engineers who travel to sites to perform the work.

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



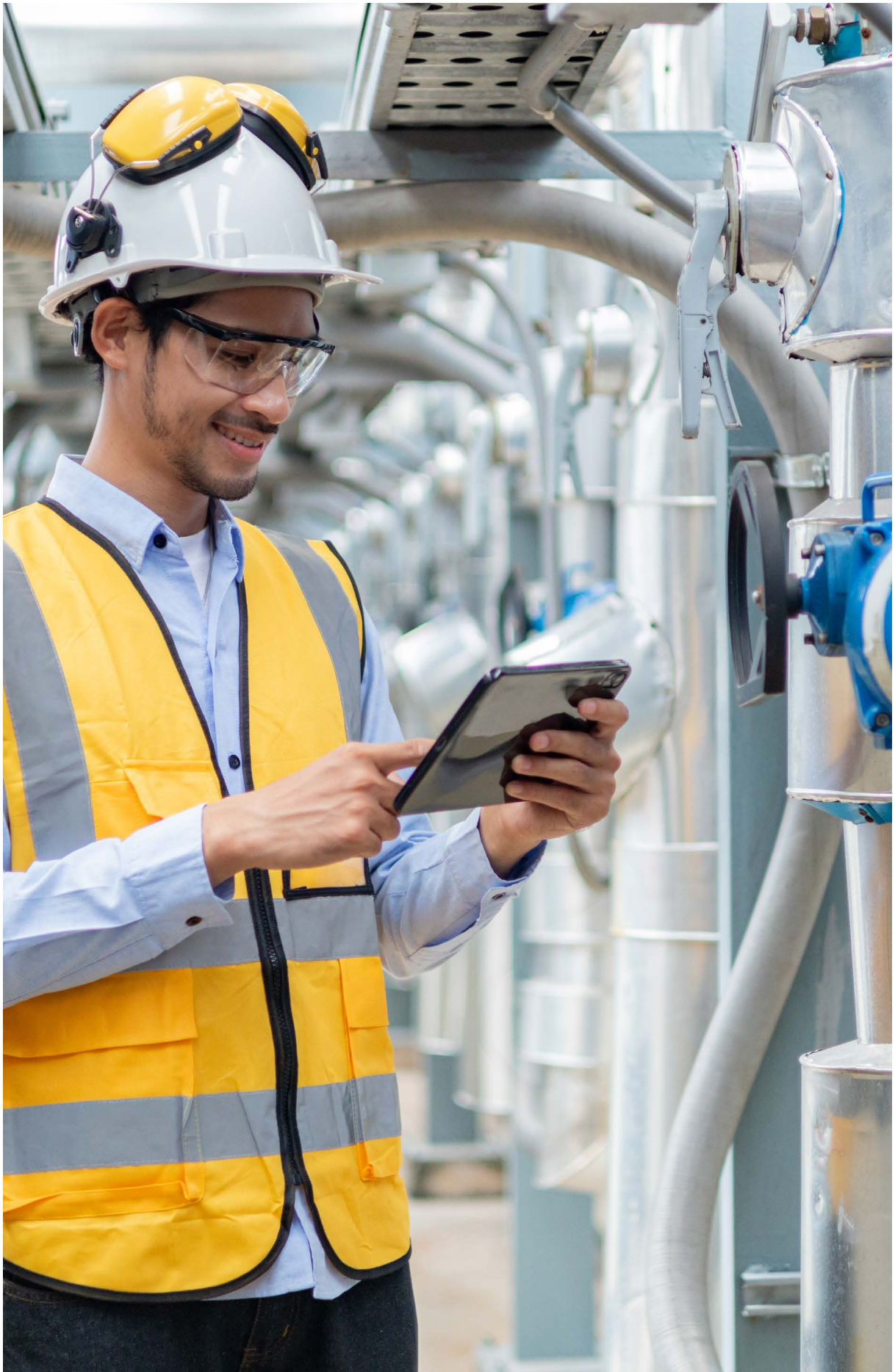
Preventive maintenance

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.

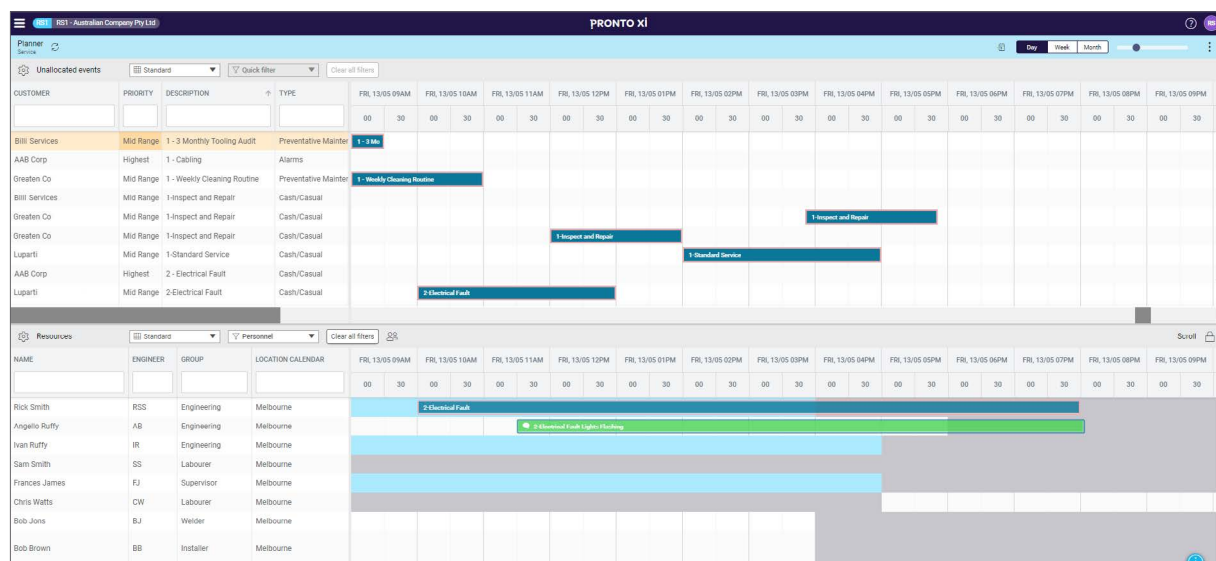
For further insights, Pronto Xi provides a visual to help you see which engineers are linked to which equipment and to know when certain equipment is booked out on a particular service call.

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

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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