PRONTO XI

Applications Overview

Pronto Sales App

Part of the CRM application

Trademarks

Disclaimer

This document contains statements related to our current and future developments that may constitute forward-looking statements. They are subject to changes and may be available in a Pronto Xi 780 service pack or future release of Pronto Xi. All diagrams, drawings, product screenshots and any other types of visualisations in this document, use demo or synthetic data created for display purposes only.

Contents

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.
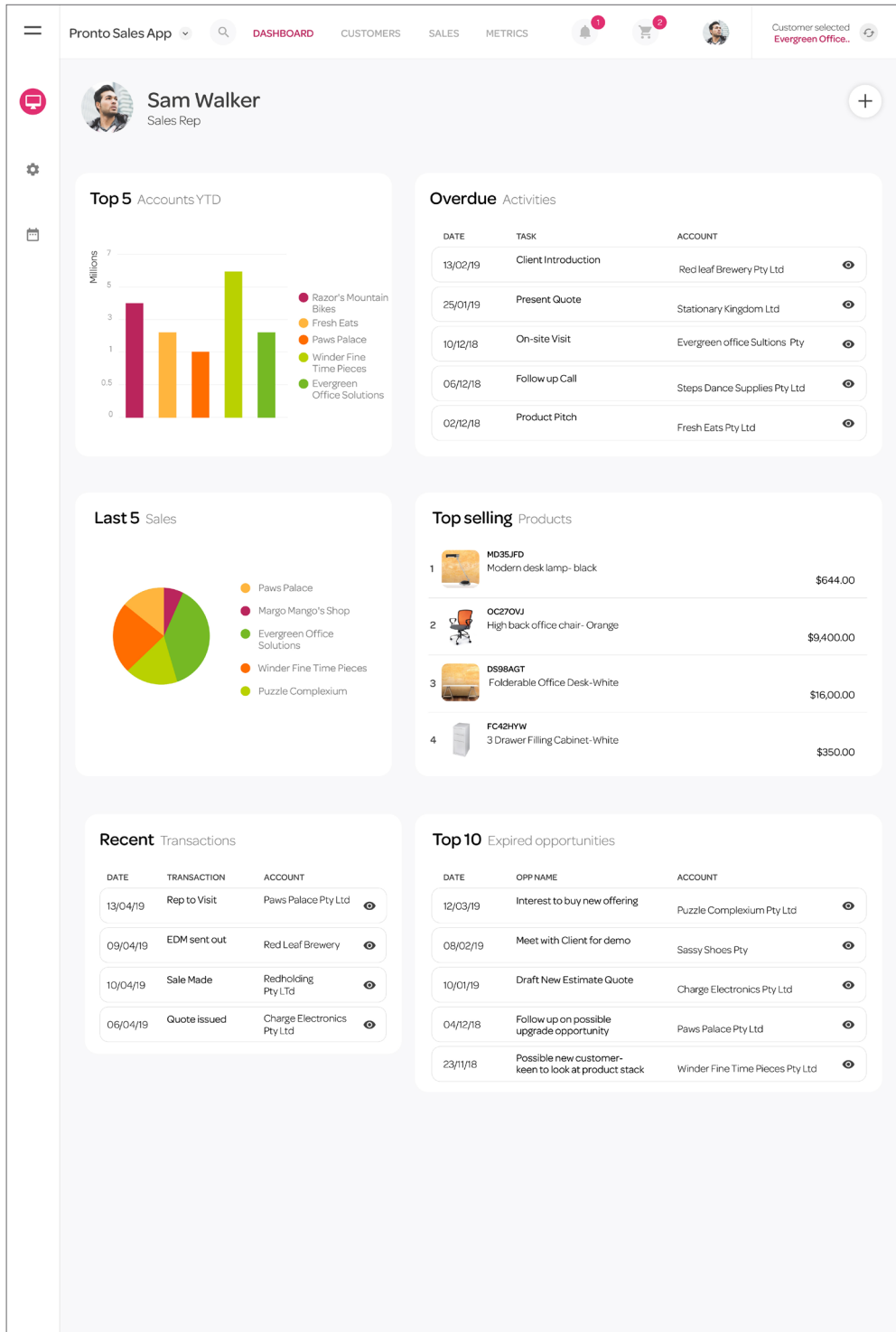
Review sales activity at a glance with the Sales Rep dashboard
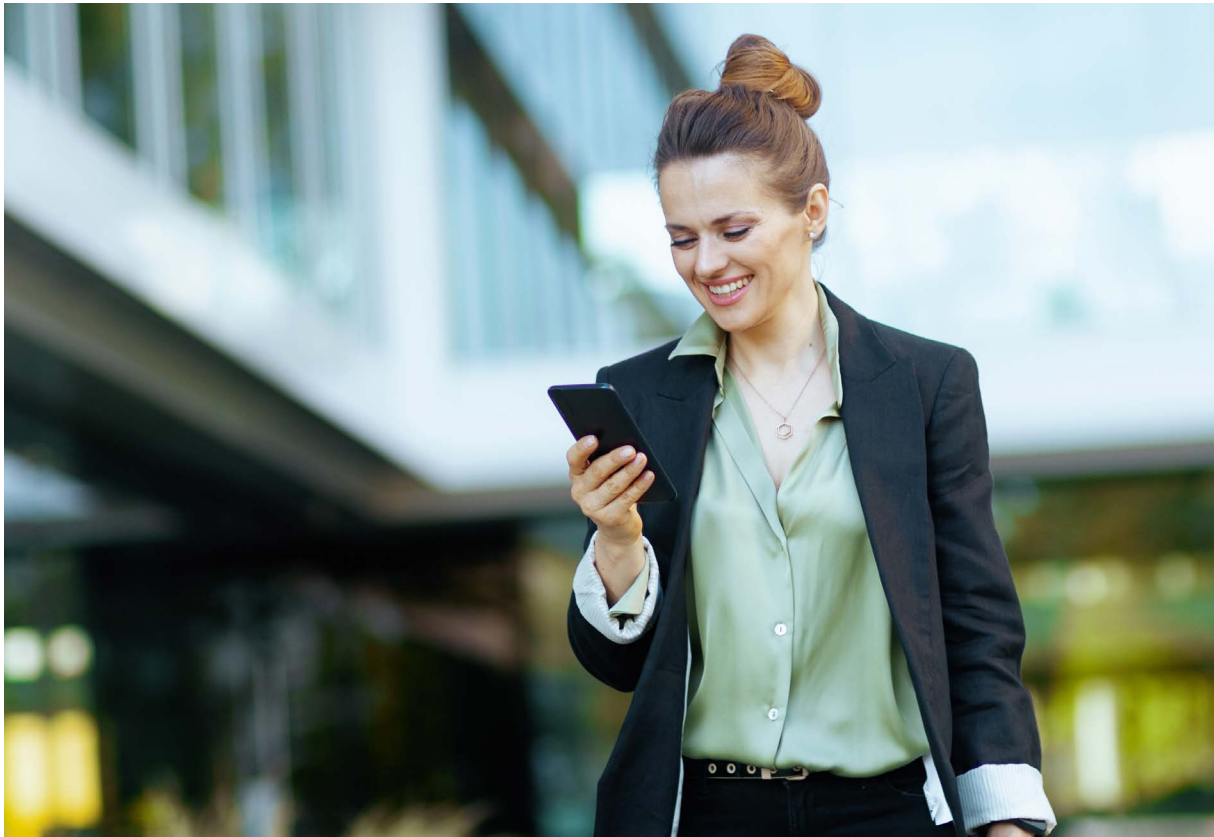
Mobile access

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.

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.

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

P pronto.net   in Pronto-Software   ▶ ProntoSoftware