

# PRONTO xi

Applications Overview



## Pronto Xi CRM

Part of the CRM application

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## 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.

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# 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:

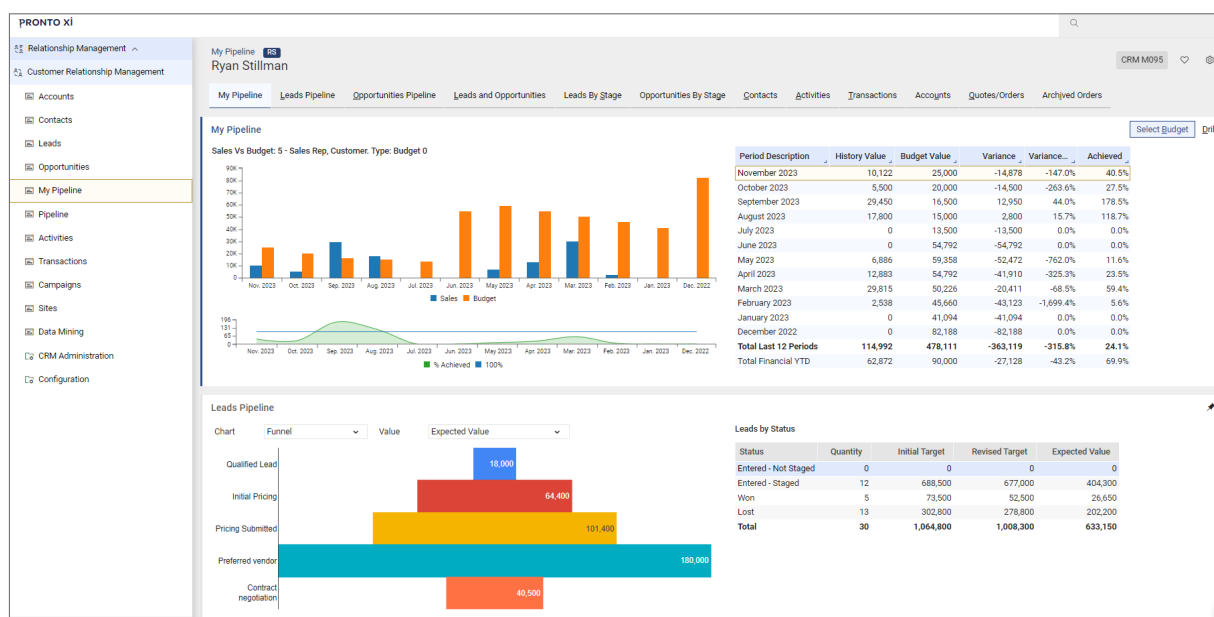
- number of leads and opportunities
- number and opportunity value of quotes in the pipeline
- value of leads by stage
- value of leads and opportunities by the top representatives in the business

## 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

PRONTO XI

Relationship Management

Customer Relationship Management

Accounts

Contacts

Leads

Opportunities

My Pipeline

Pipeline

Activities

Transactions

Campaigns

Sites

Data Mining

CRM Administration

Configuration

My Pipeline

Ryan Stillman

CRM MD95

My Pipeline

Leads Pipeline

Opportunities Pipeline

Leads and Opportunities

Leads By Stage

Opportunities By Stage

Contacts

Activities

Transactions

Accounts

Quotes/Orders

Archived Orders

Contacts

Standard

View

10

Title

Full Name

Email

Mobile Phone

Business Phone

Honoric

Gender

Position

Account Name

Contact Index

Account ID

Contact ID

David Andrews

andrewsd@nam.net

0435 765 234

13 22 45

Male

Project Manager

Corp Office Headquarters

ANDREWS

2256

1595

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9678 2222 x 23

Male

Student

Theo Chance

CHANCE

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956

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CC Music Supplies

COLEMAN

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FINLAY

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Manager

Holland

SMART

1624

746

Luke Stevens

ls@gmail.com

0408 333 222

Male

Home Owner

Met Homes

STEVENS

1423

1027

Display accounts and contacts on screen

## Attributes

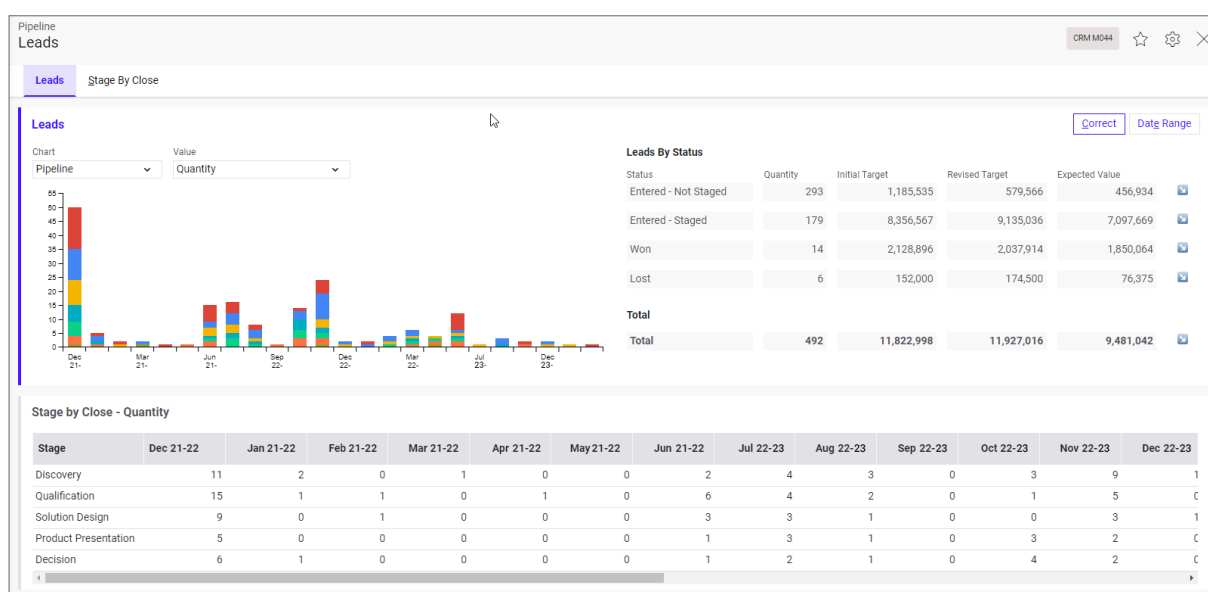
Attributes define and manage customer characteristics so you can analyse your customer database and maximise sales opportunities.

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.

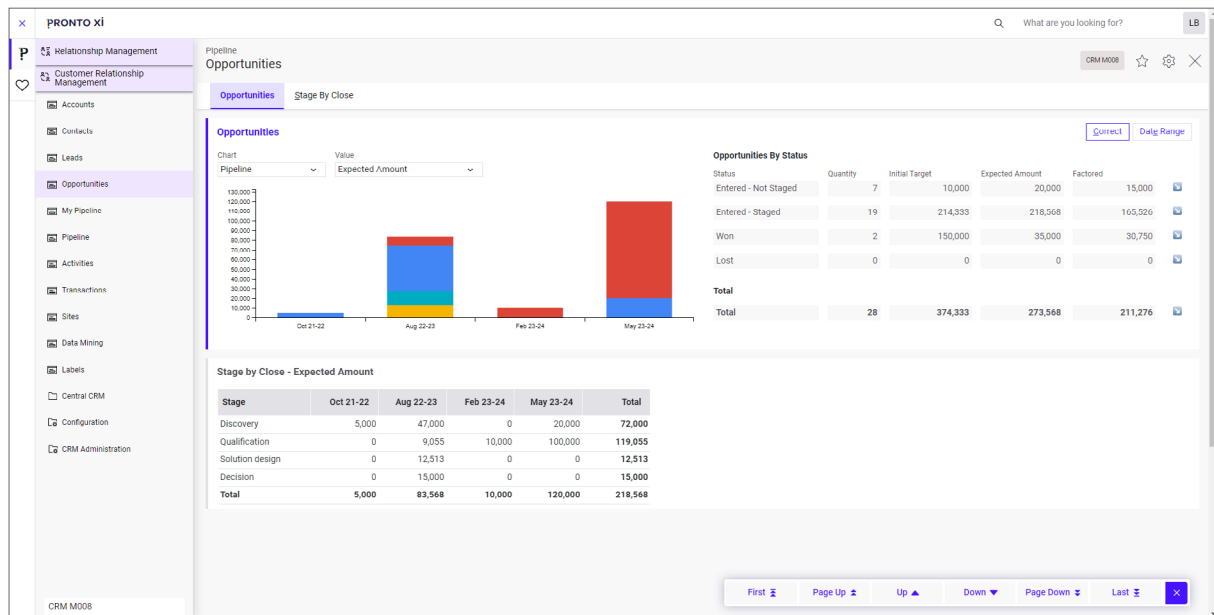
Assign a number of attributes to each company or contact. Attributes can also store more than one value under a single attribute, making information such as user preferences — which often have more than one value — easier to retrieve.

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

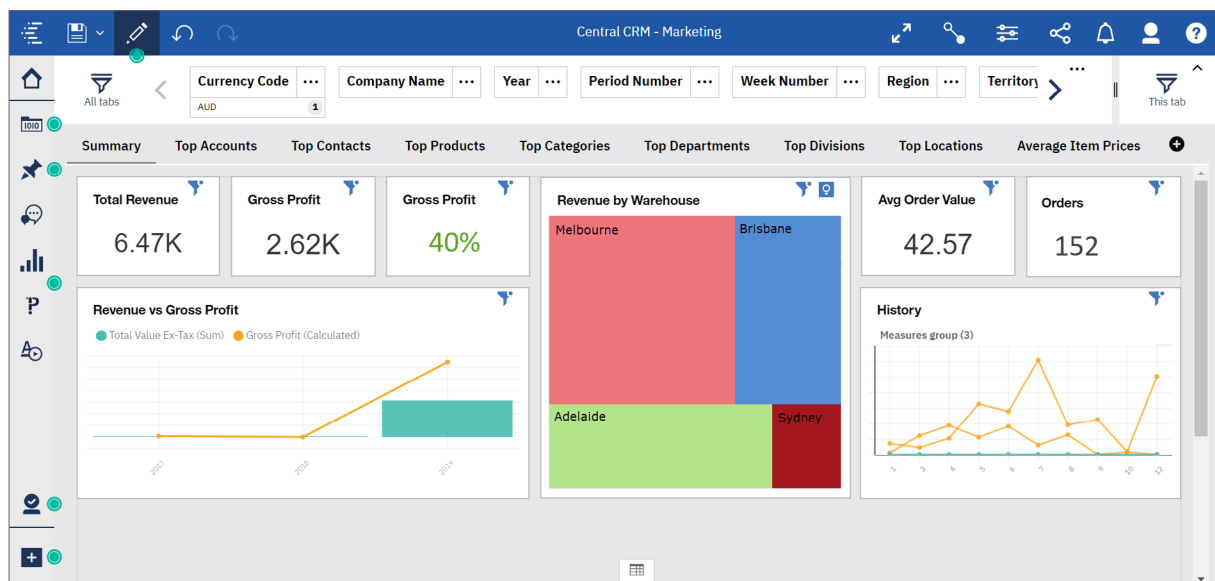
When a customer requests a quotation, it can be entered against a company. If the quotation is accepted, it converts to a sales order and a basic (cash on delivery) customer account is automatically created in Accounts Receivable. Security restrictions may apply.

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.

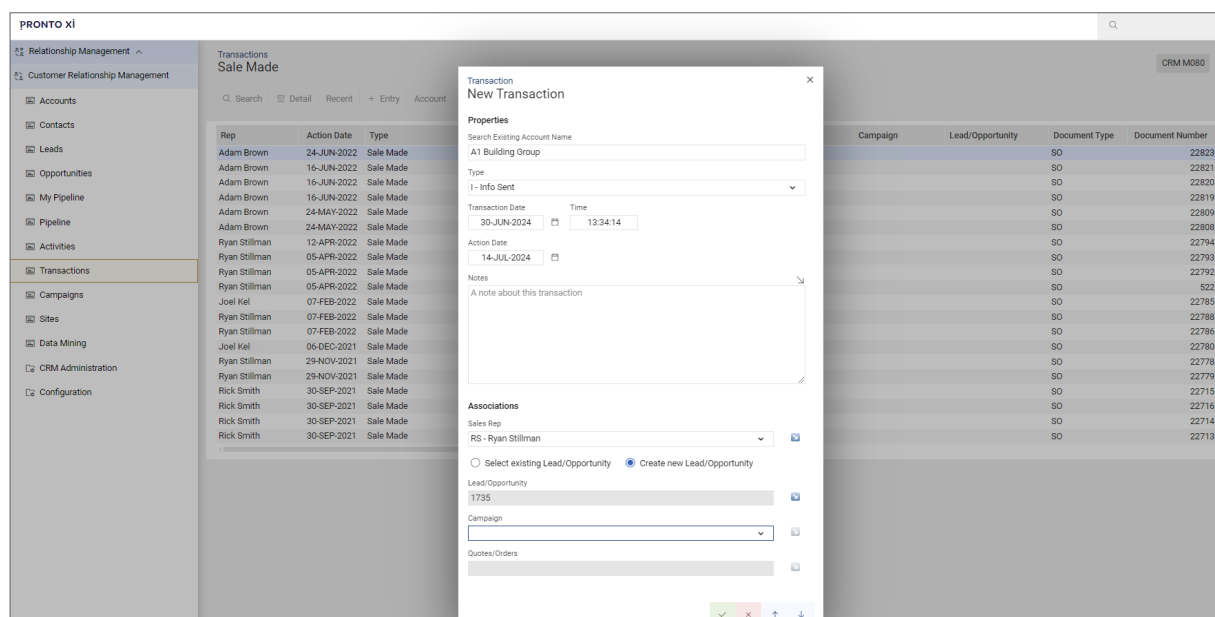
Record each transaction using a representative code and a login name so you can follow an audit trail if needed. The data grid displays the transaction date and time, campaign, transaction type, response type, action category, target date and actual date, allowing you to view exactly what happened at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



Rep	Action Date	Type
Adam Brown	24-JUN-2022	Sale Made
Adam Brown	16-JUN-2022	Sale Made
Adam Brown	16-JUN-2022	Sale Made
Adam Brown	16-JUN-2022	Sale Made
Adam Brown	24-MAY-2022	Sale Made
Adam Brown	24-MAY-2022	Sale Made
Ryan Stillman	12-APR-2022	Sale Made
Ryan Stillman	05-APR-2022	Sale Made
Ryan Stillman	05-APR-2022	Sale Made
Ryan Stillman	05-APR-2022	Sale Made
Joel Kel	07-FEB-2022	Sale Made
Ryan Stillman	07-FEB-2022	Sale Made
Ryan Stillman	07-FEB-2022	Sale Made
Joel Kel	06-DEC-2021	Sale Made
Ryan Stillman	29-NOV-2021	Sale Made
Ryan Stillman	29-NOV-2021	Sale Made
Rick Smith	30-SEP-2021	Sale Made
Rick Smith	30-SEP-2021	Sale Made
Rick Smith	30-SEP-2021	Sale Made

Campaign	Lead/Opportunity	Document Type	Document Number
		SO	22823
		SO	22821
		SO	22820
		SO	22819
		SO	22809
		SO	22808
		SO	22794
		SO	22793
		SO	22792
		SO	522
		SO	22785
		SO	22788
		SO	22786
		SO	22780
		SO	22778
		SO	22779
		SO	22715
		SO	22716
		SO	22714
		SO	22713

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.

PRONTO XI												
Activities												
Monthly Account Visit												
Standard This Week Today's Activities 20												
Account	Subject	Type	Contact	Action	Action Time	Status	End Date	End Time	Reminder	Reminder Date	Location	
Cola	Monthly Account Visit	Visit Client	Mr Eddie Hamilton	02-OCT-2023	08:00	Entered	02-OCT-2023	08:45	Yes	02-OCT-2023	Onsite	
Home Emporium	Monthly Account Visit	Visit Client	Mr David Vent	02-OCT-2023	09:30	Entered	02-OCT-2023	10:15	Yes	02-OCT-2023	Onsite	
FloRest Australia	Monthly Account Visit	Visit Client	Mr Jim Fins	02-OCT-2023	11:00	Entered	02-OCT-2023	11:45	Yes	02-OCT-2023	Onsite	
metrion	Monthly Account Visit	Visit Client	Mr Peter Jones	02-OCT-2023	14:30	Entered	02-OCT-2023	15:15	Yes	02-OCT-2023	Onsite	
Warehouse 1	Monthly Account Visit	Visit Client	Ms Kym Vest	03-OCT-2023	08:30	Entered	03-OCT-2023	09:15	Yes	03-OCT-2023	Onsite	
LuxiPart Hire	Monthly Account Visit	Visit Client	Mr Jeff Barber	03-OCT-2023	10:00	Entered	03-OCT-2023	10:45	Yes	03-OCT-2023	Onsite	
Wine Merchants of Aust P/L	Monthly Account Visit	Visit Client	Mr Jim Phillips	03-OCT-2023	12:00	Entered	03-OCT-2023	12:45	Yes	03-OCT-2023	Onsite	
A1 Building Group	Monthly Account Visit	Visit Client	Mr Peter Walsh	03-OCT-2023	14:30	Entered	03-OCT-2023	15:15	Yes	03-OCT-2023	Onsite	
Patricks Corporation	Monthly Account Visit	Visit Client	Mrs Jane Prince	03-OCT-2023	16:00	Entered	03-OCT-2023	16:45	Yes	03-OCT-2023	Onsite	
Pallets Scoresby	Monthly Account Visit	Visit Client	Mr Paul Freuwth	04-OCT-2023	09:00	Entered	04-OCT-2023	09:45	Yes	04-OCT-2023	Onsite	
Tunnel Project	Monthly Account Visit	Visit Client	Mr Ron Peters	04-OCT-2023	11:00	Entered	04-OCT-2023	11:45	Yes	04-OCT-2023	Onsite	
Bill Smithton	Monthly Account Visit	Visit Client	Mr Luke Charlie	04-OCT-2023	14:00	Entered	04-OCT-2023	14:45	Yes	04-OCT-2023	Onsite	
Building Supplies Are Us	Monthly Account Visit	Call out	Mr Lance Hartwell	05-OCT-2023	09:00	Entered	05-OCT-2023	09:45	Yes	05-OCT-2023	Onsite	
SOUTHFAC	Monthly Account Visit	Visit Client	Mr Liam Potter	05-OCT-2023	10:00	Entered	05-OCT-2023	10:45	Yes	05-OCT-2023	Onsite	
Might Power	Monthly Account Visit	Visit Client	Benjamin Matek	05-OCT-2023	11:00	Entered	05-OCT-2023	11:45	Yes	05-OCT-2023	Onsite	
XZY Limited	Monthly Account Visit	Visit Client	Mr Williams	05-OCT-2023	13:00	Entered	05-OCT-2023	13:45	Yes	05-OCT-2023	Onsite	
Dandernong GreB	Monthly Account Visit	Visit Client	Sameer Laghari	05-OCT-2023	14:00	Entered	05-OCT-2023	14:45	Yes	05-OCT-2023	Onsite	
Gipp Water Ltd	Monthly Account Visit	Visit Client	Mr Noel Finch	05-OCT-2023	15:00	Entered	05-OCT-2023	15:45	Yes	05-OCT-2023	Onsite	

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

## 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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