



Pronto Sales App

Gain visibility to empower
the sales teams

PRONTO WOVEN



Nurturing long-term customer relationships with ease

Great customer relationships are based on great communication and meaningful conversations. Understanding customers and their needs is vital in forming engaging interactions. To achieve sales objectives, management and sales teams require complete visibility over their pipeline to best coordinate and manage reps and their daily activities.

When reps are on the road it's very easy to mis-enter details or eliminate vital information about their different interactions. This can result in a lack of clarity of what's happening with that account and sometimes even double handling of data. The quality of the information entered plays an important role in generating transparency and visibility, which allows businesses to make informed decisions when building their pipeline. A mobile sales application that provides staff with easy access to the customer relationship information and real-time inventory data they need is essential.

Pronto Sales App is the ultimate companion for an on-the-go sales team. With mobile-first responsive design, sales reps have all the functionalities of a sales CRM at their fingertips on their device, equipping them to manage scheduled and ad hoc activities while out visiting clients in real-time.

On one single platform, reps gain a complete view of customer accounts and have full access to sites, contacts, transactions, running campaigns and client attributes. Linking seamlessly to Pronto Xi, the application enables complete customer profiles and live updates of inventory data, so businesses know sales teams are always working with the most current information.

Reps have access to dashboard to view quick insights into top clients, products and past sales. This visibility alongside features that help improve the quality of notes input by ensuring the language used by reps are consistent and sufficient detail.

Supporting full shopping cart and payment gateway features reps can process sales and take payments for any deals on the spot. With improved user interface and intuitive powerful features, Pronto Sales App will enable sales teams to confidently engage with customers consistently across every touchpoint, improving deal and quote responsiveness.

Key Benefits

Work from anywhere

With a mobile-first responsive design, sales reps have access to all the details they need at their fingertips while on the move. All of the details needed to stay up-to-date about their activities, contacts, accounts and deals are just a tap away. After their meetings, reps can schedule follow-up activities, update details and notes or create deals even as they head off to their next appointment.



Deep customer insights

Capture personal and conversational aspects of customers who are interested in certain products and create deals that can be accurately tracked in the pipeline. This helps to gain a full overview about customers and the activities or appointments scheduled via the timeline to build and fill the sales pipeline with engaged conversations to increase conversions.



Get a 360 degree view of deals

The sales team and managers can also quickly assess the health of a pipeline and apply filters to view in-depth pipeline analysis, helping them to stay on top of their team's sales performance. Contacts and product and order information can be associated directly with opportunities creating an all-in-one highly informative view.



Consistency and simplicity

Gain synced and consistent information through seamless integration of both eCommerce and ERP. Built on a single platform with integrated eCommerce, sales reps will be using the same system as the customer, providing consistency across every engagement.



Visibility to focus and fuel sales activities

Key features

Ensuring reps are where they need to be to achieve sales goals

The screenshot displays the Pronto Sales App interface. The top navigation bar includes a menu icon, the app name 'Pronto Sales App', a search icon, and tabs for 'DASHBOARD', 'CUSTOMERS', 'SALES', and 'METRICS'. On the right, there are notification icons (1 and 2), a user profile, and a dropdown for 'Customer selected: Evergreen Office...'. The main content area is divided into two sections. The left section, titled 'ACCOUNT DETAILS', shows the profile for 'Evergreen Office Solutions Pty Ltd' with address '30 Oak Lane Liverpool, NSW, 2618' and contact icons. Below this is a 'Contacts' list with 'Ms Ellie Green' (Co-creator) and 'Mr David Poe' (Sales Manager). The right section, titled 'UPCOMING', shows a timeline of activities. A modal window is open for scheduling an activity. It includes fields for 'ACTIVITY TYPE' (set to 'Follow up (Calendar Booking)'), 'CONTACT' (set to 'Mr David Poe'), 'Subject*', 'Description', 'Set time' (with 'Start Date*' and 'Start Time*' set to 'Monday 23 September, 2019' and '9:30 AM' respectively), 'End Date*' and 'End Time*' set to 'Monday 23 September, 2019' and '10:30 AM' respectively, 'TIME ZONE' (set to 'Melbourne'), 'REMINDER' (set to '15 mins before'), 'PRIORITY' (with 'Low', 'Med', and 'High' options, 'High' is selected), 'ASSIGNED TO' (set to 'Sam Walker'), and 'ASSOCIATE WITH' (with a dropdown and 'Choose File' button). A 'SUBMIT' button is at the bottom right. A note at the bottom of the modal states '* Indicates required fields'.

Scheduling activities on-the-go

Sales reps can schedule activities and attach them to deals in their pipeline before viewing their entire to-do list on one, easy-to-navigate page. Activities can also be assigned to a customer account and a contact with that account based on business preferences so reps will never miss a follow-up task.

Sales reps can view their notes, activities and transactions instantly in one single stream – they can also choose to narrow it down so they can view certain dates or types of activities.

Product information, search and filter features

As business continues to grow and evolve, the number of products it offers customers are likely to increase. With real-time inventory synchronisation with Pronto Xi, including stock levels and pricing, reps can find all important promotional and technical information with the intuitive product search tools. This ensures reps are guiding and advising customers with up-to-date and consistent product data.



Pronto Sales App

DASHBOARD

CUSTOMERS

SALES

METRICS

1

2

Customer selected
Evergreen Office...

CRM

Search for Accounts

SEARCH

Search filters

ACCOUNTS

CUSTOMERS

LEADS/OPPS

CAMPAIGNS

<div>Fresh Eats Pty Ltd</div> <div>3 Citrus Road, Fairfield, NSW, 3587</div>	<div></div> <div></div> <div></div>	<div>394DKS</div> <div>NSW</div> <div>B2B</div> <div></div>
<div>Paws Palace Pty Ltd</div> <div>70 Tail Street, Ringwood, NSW, 3296</div>	<div></div> <div></div> <div></div>	<div>394DKS</div> <div>NSW</div> <div>B2B</div> <div></div>
<div>Razor's Mountain Bikes Pty Ltd</div> <div>97 Handle Drive, Herston, NSW, 3151</div>	<div></div> <div></div> <div></div>	<div>394DKS</div> <div>NSW</div> <div>B2B</div> <div></div>
<div>Winder Fine Time Pieces Pty Ltd</div> <div>12 Point Road Epping, NSW, 3678</div>	<div></div> <div></div> <div></div>	<div>394DKS</div> <div>NSW</div> <div>B2B</div> <div></div>

Customer insights at the fingertips

Providing sales teams with the right information to engage with confidence

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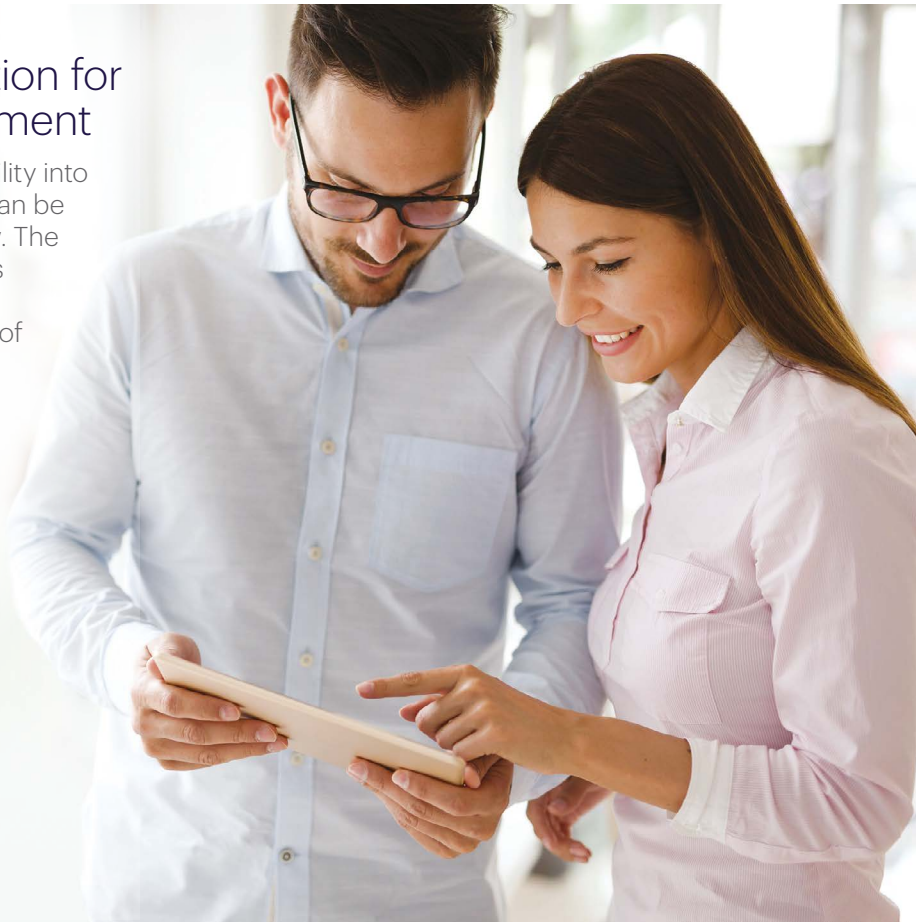
Timeline function to track sales engagement

The timeline view displays all sales activity chronologically, including accounts, contacts, activities (notes) transactions, leads and opportunities.

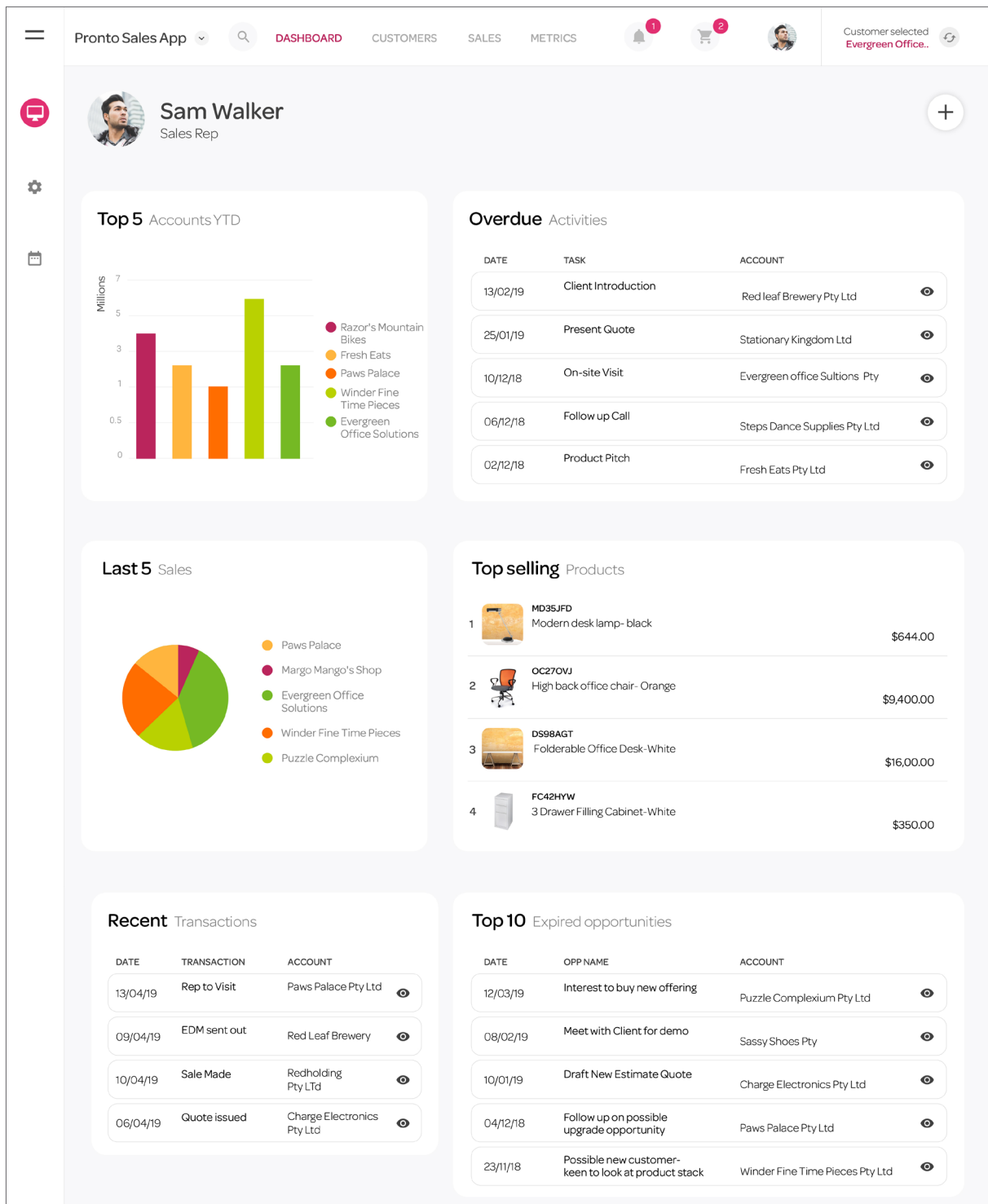
This presents a visual snapshot of how engaged customers and prospects are with a rundown of all touch points with a record in one single stream. This is an invaluable tool for onboarding sales staff as a customer's history can show the evolution of the relationship.

Pipeline function for deal management

Benefit from full visibility into pipeline as all deals can be managed in one view. The pipeline focuses rep's efforts by providing a clear visual overview of all deals to view their status and what they need to do next. Reps can drag-and-drop their leads or opportunities between different stages of the sales funnel.



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Always open, always closing

Being proactive and responsive is possible with a few quick clicks. Generate quotes, negotiate pricing and close deals while on-the-go

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ID NUM.	REF	ORDER DATE	INVOICE	STATUS	TOTAL
1779	456	14/02/18	1779	Completed	\$78,450.00
1239	489	08/02/18	1239	Completed	\$3,400.00
2424	596	12/04/18	2424	Completed	\$5,650.00
3454	769	25/06/18	3454	Completed	\$52,650.00
3589	878	01/07/18	2424	Ready for picking	\$5,650.00
3912	938	13/07/18	1779	Entered on hold	\$78,450.00
4006	959	28/07/18	1239	Credit hold	\$3,400.00

Quick order placement

Pronto Sales App provides tools for reps to quickly create orders based on item codes rather than the usual keying in of search terms. Reps can even create template orders that are client or task specific and easily adjust quantities as needed. Easily enter sales orders or quotations that adhere to business standards and controls such as credit limits, product restrictions (for item security) and customer specific pricing. Reps can also link any in-progress sales orders to deals in their pipeline.

Order history

With full visibility of a customer's order history, Reps can facilitate better conversations which lead to repeat purchases and gain insights into fluctuations to order quantity or item returns. With one glance, reps can review outstanding orders and balances or unused credits to provide well-rounded and informed customer service to their clients.



About us



Pronto Woven is the award-winning digital consultancy division of Pronto Software – an Australian developer of ERP and analytics software. The team's innovative solutions transform customer and employee engagement across digital channels – extending the capabilities of Pronto Xi ERP and driving strategic change.

Pronto Woven helps organisations harness the power of real-time interactions from a single source of truth – to simplify operations and enhance customer experience. Working in synergy with Pronto Software, these ERP savvy creatives are redefining the boundaries of traditional business systems. Several organisations, across a range of industries benefit from Pronto Woven's deep expertise including Pedders Suspension, CR Kennedy and Narva.

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 woven.com.au

 Pronto-Woven

 ProntoSoftware

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