

PRONTO xi



Sales & Marketing  
Make money talk

© Copyright 2018 Pronto Software Limited.  
All rights reserved.

740 Solutions Overview: Sales & Marketing

## Trademarks

© PRONTO, PRONTO ENTERPRISE MANAGEMENT SYSTEM, PRONTO SOFTWARE (Logo) and Pronto Xi, are trademarks registered by Pronto Software Limited (ABN 47 001 337 248) in the United States of America, Australia and other countries.

™ Trademarks of Pronto Software Limited (ABN 47 001 337 248).

IBM® and Cognos® are trademarks of International Business Machines Corporation.

Microsoft, Excel and PowerPoint are registered trademarks of Microsoft Corporation in the United States and/or other countries.

## Disclaimer

This document contains statements related to our current and future developments that may constitute forward-looking statements. They are subject to change and may be available in a 740 service pack or future release of Pronto Xi.

# Sales & Marketing

## Contents

<b>4</b>	<b>Make money talk</b>		
5	Target your market		
<b>6</b>	<b>Pronto Xi Point of Sale</b>		
7	Real-time connectivity		
7	AT Mode (Auxiliary Trading Mode)		
8	Cash drawer control		
9	Retail Store Console		
9	Point of Sale entry		
10	Multiple Sales Functions		
12	Powerful retail promotions management		
13	Promotions effectiveness		
13	Warehouse (back-office) functions		
14	User-definable tender types		
14	Decision Support System		
15	Management functions		
16	POS screens made to measure		
16	Total control		
17	Store allocations		
18	Group trading		
19	Integration with Pronto Xi		
20	Intuitive and easy online shopping		
20	Manage your own content		
21	Technology on rails		
21	Get online fast		
21	Integrate using APIs		
<b>22</b>	<b>Pronto Xi Repairs Management</b>		
22	Easy repair lifecycle		
22	Repairs statistics		
22	Close process gaps		
22	Customer service		
<b>24</b>	<b>Pronto Xi CRM</b>		
25	CRM Console		
25	CRM Business Dashboard		
26	Address book and contact manager		
27	Sales management		
28	ERP integration		
29	Improving your Outlook		
30	Transactions		
30	Notes and attachments		
30	Integrated search		
30	Integrated data mining		
31	Activities		
31	Campaigns		
31	Web map links		
<b>32</b>	<b>Pronto Xi Mobile Sales &amp; CRM</b>		

# Sales and Marketing

## Make money talk

Steer the sales and marketing functions of your organisation with confidence.

By putting the needs of your customers first, the fully integrated Pronto Xi Sales and Marketing modules support your initiatives towards an omni-channel ecosystem.

Analyse customer and prospect needs, identify the customers that require the most attention and recognise the business processes that deliver superior customer service and promote repeat business. Make it easy for customers to complete online transactions. Extend the customer experience to after-sales service.

Achieve all of this while reaping the benefits of an integrated solution, eliminating double-handling and enhancing visibility and data integrity.



## Target your market

Our Sales and Marketing modules help you keep the quality of your customer relationships top-of-mind.

From Point of Sale to eCommerce and beyond, Pronto Xi Sales and Marketing is designed to help you nurture your customers and minimise the costs per transaction.

### Pronto Xi Point of Sale

A powerful, secure and flexible system that allows your staff to concentrate on customers' needs rather than the mechanics of transaction processing. It combines real-time integration with ease of use to deliver an optimum work environment for all personnel, from Point of Sale (POS) operators to senior management.

### Pronto Xi eCommerce

Quickly and simply start selling products online, with full Pronto Xi integration and a customisable storefront empowering you to achieve your omni-channel goals. Feature-packed, it delivers ever-expanding functionality widely employed by some of the most successful online stores of today.

### Pronto Xi Repairs Management

Make it simple to manage customer repairs using a logical 'lifecycle' system. Quotes, labour, parts, transfers and payments of repairs can all be easily mastered and efficiently completed.

### Pronto Xi CRM

Customer Relationship Management helps you successfully adopt a customer-focused approach within your business.

A robust customer intelligence tool, Pronto Xi CRM is designed to harness your organisation's repository of data to assist in sales force automation, customer service and support, and marketing opportunities.

### Pronto Xi Mobile Sales & CRM

Mobile Sales is the ultimate companion for sales professionals in the field. With seamless integration with Pronto Xi CRM It provides access to customer sales and account manager related activities when it's needed most, as well as real-time information about product availability and customer specific pricing.

# Pronto Xi Point of Sale

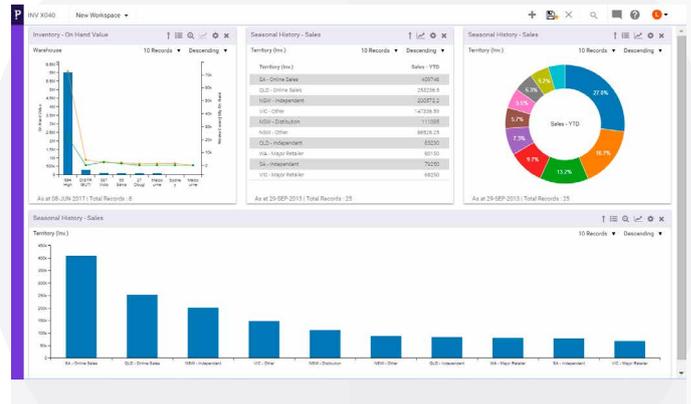
## Hoist your sales

Reduce transaction times with our powerful Point of Sale software so your staff can focus on your customers, not the cash register.

Pronto Xi Point of Sale ensures full visibility from your head office down to each cash register, giving you complete control over your business, regardless of size. Our powerful, flexible system takes the mechanics of transaction processing off the shop floor, giving you an integrated solution that enhances visibility and data integrity, and eliminates double handling.

Key benefits include:

- Centrally managed pricing (including updates, special customer pricing and retail promotions)
- Margin tracking
- Easy integration with established rewards or loyalty programs
- Visual item inventory
- Sales, enquiry, management and warehouse functions
- Sales transactions can be linked for reference via Pronto Xi CRM



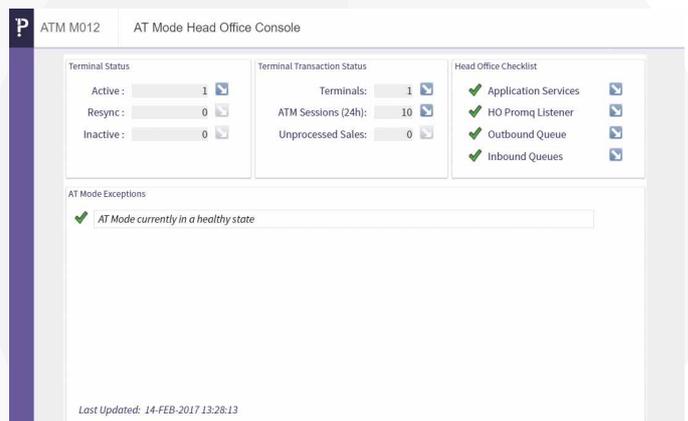
## Real-time connectivity

Point of Sale is integrated in real-time with all of your back-office functions, including financials and distribution. Transactions captured at POS are updated in your general ledger, ensuring that your financials are always accurate.

## AT Mode (Auxiliary Trading Mode)

Ensure that customers are serviced and staff are confident at the Point of Sale even if your store loses network connectivity. AT Mode provides retailers with peace of mind knowing that their people can continue processing normal cash and debtor sales if the terminal loses connection with the server.

AT Mode is easy to set up for existing and replacement terminals. It provides hassle free switch over into auxiliary trading mode when there's a loss of connectivity, providing the operator with a visual reference. Once the network is re-established the auxiliary trading mode solution will automatically update the main system with all the transactions created during the non-live connection period. AT Mode architecture is built for scalability.



## Cash drawer control

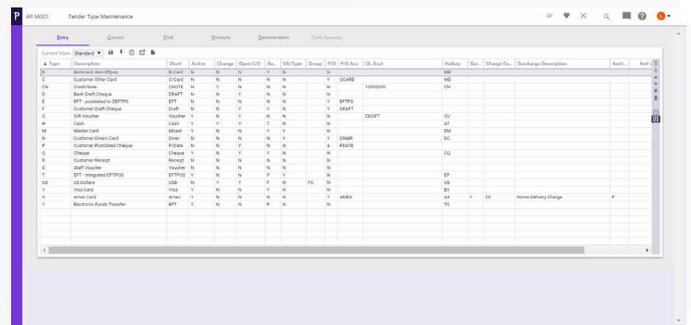
Point of Sale controls both the physical and financial handling of transactions made to a cash drawer. It is compatible with a wide variety of POS hardware. You can choose to operate one drawer per terminal or allow multiple terminals to control a single cash drawer.

Transactions posted to a cash drawer during a shift are identified by a unique batch number. The drawer total for each tender type (cash, cheque, credit card, etc.) is accrued as receipts are processed through the drawer, allowing the operator to reconcile the contents of the drawer against the recorded totals at any time.

At the end of the shift, the operator can close the cash drawer and bank the takings. Full cash drawer reconciliation allows you to track any settlement differences and post the necessary transactions to the general ledger. Postings can be uniquely identified and dispersed by store identification and cash drawer number.

The Pronto Xi Cash Drawer Control function complies with Australian and international rounding regulations, and offers additional flexibility for you to use your own business policy for rounding cash sale transactions.

Each cash drawer can be configured to suit any individual situation or operator. A variety of sales functions, including lay-by processing, backorder processing, price discounting and others, can be made accessible or excluded from selection with specific security requirements. Cash drawer balances can be viewed and managed via the Retail Store Console.



The screenshot displays the 'Tender Type Maintenance' window in the Pronto Xi software. The window title is 'Tender Type Maintenance' and it shows a list of tender types with columns for 'A. Type', 'Description', 'Status', 'Active', 'Change', 'Bank ID', 'ID', 'ID Type', 'Shop', 'POS', 'POS Acc', 'ID Acc', 'Holiday', 'Sec', 'Change Cr.', 'Backlog Description', 'Acct.', and 'Acct.'. The list includes various tender types such as 'Banked Receipts', 'Customer Other Card', 'Cash', 'Bank Cash Cheque', 'EFT - Australian EFTPOS', 'Customer Cash Cheque', 'Cash', 'Master Card', 'Customer Other Card', 'Customer Assisted Cheque', 'Cheque', 'Customer Receipt', 'EFT - Unmapped EFTPOS', 'EFTPOS', 'MID', 'VISA', 'AMEX', and 'Electronic Funds Transfer'.

A. Type	Description	Status	Active	Change	Bank ID	ID	ID Type	Shop	POS	POS Acc	ID Acc	Holiday	Sec	Change Cr.	Backlog Description	Acct.	Acct.
00	Banked Receipts	Banked	N	N	N	N	N	N	N	N	N	N	N	N	N	N	N
01	Customer Other Card	C-CARD	N	N	N	N	N	N	CCARD			N	N	N			
02	Cash	CASH	N	N	N	N	N	N		1000000		N	N	N			
03	Bank Cash Cheque	CHEQT	N	N	N	N	N	N				N	N	N			
04	EFT - Australian EFTPOS	EFT	N	N	N	N	N	N		EFTPOS		N	N	N			
05	Customer Cash Cheque	CHEQT	N	N	N	N	N	N				N	N	N			
06	Cash	CASH	N	N	N	N	N	N		200000		N	N	N			
07	Master Card	MCARD	N	N	N	N	N	N				N	N	N			
08	Customer Other Card	C-CARD	N	N	N	N	N	N				N	N	N			
09	Customer Assisted Cheque	CHEQT	N	N	N	N	N	N				N	N	N			
10	Cheque	CHEQT	N	N	N	N	N	N				N	N	N			
11	Customer Receipt	CHEQT	N	N	N	N	N	N				N	N	N			
12	EFT - Unmapped EFTPOS	EFT	N	N	N	N	N	N				N	N	N			
13	EFTPOS	EFTPOS	N	N	N	N	N	N				N	N	N			
14	MID	MID	N	N	N	N	N	N				N	N	N			
15	VISA	VISA	N	N	N	N	N	N				N	N	N			
16	AMEX	AMEX	N	N	N	N	N	N				N	N	N			
17	Electronic Funds Transfer	EFT	N	N	N	N	N	N				N	N	N			

## Retail Store Console

The Pronto Xi Retail store console draws together common retail functions, so it's easier than ever to manage your retail operation. The primary view is a specific store's data, filtered for a specific operator, making his or her job easier and faster.

The console shows rich graphical reporting via Cognos, so you have the facts you need to make informed decisions confidently. Refresh your reports with a click for live analytics. Elements within the console include:

- Today's Sales
- Sales for a configurable period (eg. your trading hours, or 24 hours)
- Operators Sales
- Cash Drawer Balances
- Events (Event Transaction Log)
- User Defined Option

Each report on the console is a standard Cognos report, based on a Point of Sale package, presented on its own tab. This is a highly adaptable setup, because you and your people can modify or author your own BI content and present it on any of the console tabs.

## Point of Sale entry

Your staff can complete sales quickly and simply, reducing stress in peak sales periods, which helps ensure customers always receive efficient and friendly service.

At the back end, Point of Sale creates a sales order to represent the sale. When a sale is completed at POS, the available inventory is automatically adjusted. Once the sales order is updated, the financial postings and necessary inventory movements are recorded. Depending on your needs, sales processed at POS can be made to user-defined cash sales accounts and trade accounts.

## Multiple Sales Functions

### Quotations

Sales quotations are produced and tracked through to a completed sale. Lost quotations can be tracked and analysed.

### Charge customers

Retailers can sell to an account customer at POS with full credit control and special pricing rules in place. New customer accounts can be created at POS, allowing retailers to track important customer purchases and information.

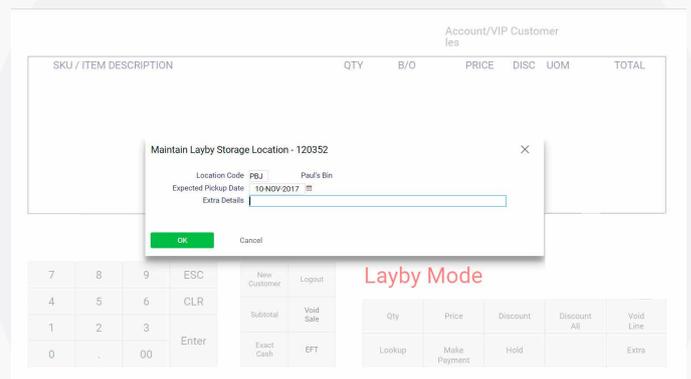
Account sales are fully integrated with Pronto Xi Accounts Receivable. Customers can be applied to a sale at any point, with an option to re-price the sale order on the fly, allowing you to provide superior customer service. Customer details and sales history can be accessed at the touch of a button.

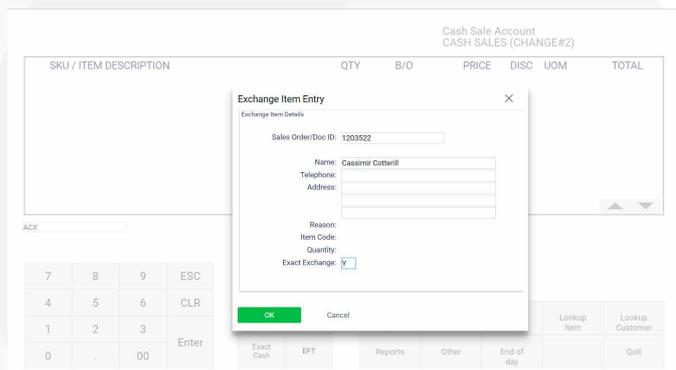
Where a deposit may be required for special order arrangements or 'pre orders' for high demand items Pronto Xi POS allows for the nomination of a default deposit percentage for these deposits. This streamlines operations, provides a higher quality of service and safeguards against financial exposure.

### Lay-by entry

Lay-bys can be managed at POS or in the back office. Lay-by terms and conditions are easily defined, making lay-by entries effortless.

Lay-bys can be recalled from any POS workstation, with detailed information available. You can find a lay-by via customer or status. Point of Sale can even handle the partial pickup of lay-bys, and physical lay-by storage locations can be tracked to help staff find customer lay-bys easily.





### Goods refund

Point of Sale has the flexibility to manage refunds according to your own needs. It can handle returned items and issue credit notes, tender refunds, vouchers or credits to a customer account as specified. Refunds can be validated down to the line level, ensuring the refunded amount is legitimate and accurate.

An optional barcode can be printed on the docket to assist the operator when processing returns. The real-time capabilities of Pronto Xi negate a major cause of refund fraud, protecting legitimate customers and your business.

### Goods exchange

Exchanging purchased items can be a frustrating experience for both customers and retail staff. In Point of Sale exchange of goods are handled efficiently within a single transaction. Additionally, all details of the exchange are audited tracked and are therefore clearly visible to the Supervisor for later analysis and reporting.

To cater for more complex retail scenarios multiple orders can be exchanged within a single order to further reduce complexity and time.

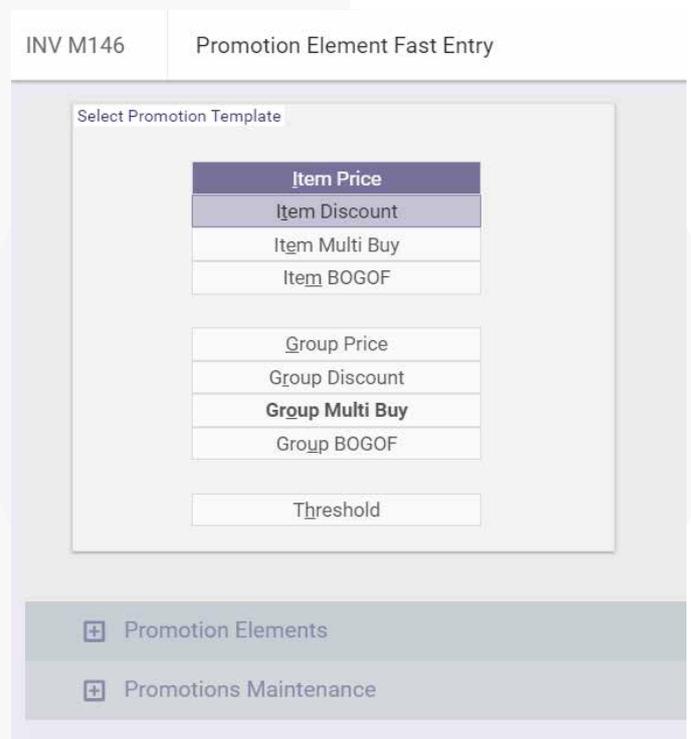
## Powerful retail promotions management

Pronto Xi Promotions Engine provides a flexible and powerful rule-based engine to manage key aspects of promotional activity for both retailers and wholesalers. It establishes a simple, efficient and effective methodology to create, copy, manipulate and report on promotions.

Whether you want to run simple 'buy one get one free' (BOGOF) style promotions, date-driven events or total order incentives, the Promotions Engine lets you capitalise on today's competitive landscape. Our 'Fast Entry' screen makes the configuration and maintenance of your promotions clear and straightforward.

Planning out the promotional strategy ahead of time is simple because you can create and schedule promotions to automatically open and close on specific dates. You can even schedule events to run at specific times.

You can easily monitor the progress and outcome of your promotions by using a reporting group, promotional code and associated elements that make up the core promotion. For example, an event such as Mother's Day can be set up under one promotional code with the various qualifiers that specify the products. This provides simpler maintenance and makes reporting efficient and effective.

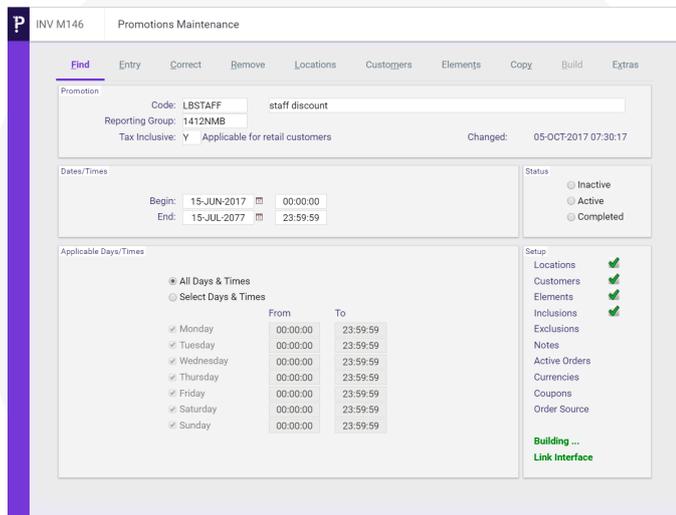


The screenshot displays the 'Promotion Element Fast Entry' interface. At the top, there are two tabs: 'INV M146' and 'Promotion Element Fast Entry'. Below the tabs is a 'Select Promotion Template' section containing a list of templates:

- Item Price
- Item Discount
- Item Multi Buy
- Item BOGOF
- Group Price
- Group Discount
- Group Multi Buy
- Group BOGOF
- Threshold

At the bottom of the interface, there are two expandable sections:

- + Promotion Elements
- + Promotions Maintenance



## Promotions effectiveness

Running a promotion is one thing, but you also want to know how it worked. Identifying which promotions and items succeeded and which did not gives you valuable insight into your business. To make that insight simple, a reporting structure has been added that: provides visibility of total revenue and GP by item, group, brand, etc; enables benchmarking of your stores; helps your merchandise officers better manage replenishment levels; and gives you a platform of solid facts from which to negotiate with your suppliers for future promotions.

## Warehouse (back-office) functions

When inventory is unavailable in-store, the operator can check all other stores and warehouses in real-time. This enhanced visibility empowers (authorised) staff to organise inventory transfers while securing the sale with the customer present.

Alternatively, a sale can be partly processed, suspended pending arrival of inventory, and then resumed for completion when the inventory is available in-store. Operators can enquire on outstanding purchase orders, check the supplier's scheduled delivery time, and set appropriate customer (available to promise) expectations.

SMS alerts can be sent to customers once their product is available.

## User-definable tender types

With Point of Sale you can define the tender types you will accept at POS, including business-specific tender types. For example, store gift vouchers, store 'dollars', store cards and other tender types can be created.

In retail environments where checkout lanes are divided by tender type – for example 'cash only' or 'card only' – you can assign a specific tender type to a cash drawer. This provides flexibility for retailers that configure their lane preferences to ensure operations are faster and more convenient.

For each of the defined tender types, Point of Sale can be set up to control whether a cash drawer opening is triggered. Staff can also be prompted to request additional information based on your business rules for the tender type.

To make processing faster and more efficient, Pronto Xi Point of Sale provides an integrated EFTPOS solution with a number of established payment providers.

## Decision Support System

Point of Sale Decision Support System gives you an immediate view of sales, by hour, day, week, month, quarter or year. Data can be filtered, drilled down into and represented as graphs, with key indicators highlighted.

For those using the Pronto Xi Supplier Rebates Module, notional costing results can be viewed via the Decision Support System. This enables you to view the data by the floor cost, net cost or net net cost.

Up-to-the-moment information is available, providing you with performance data at every level – from store through to lane or a specific sales representative. The Decision Support System can be 'filtered' by store or operator, allowing key transactional data to be selectively exposed to store staff.

ID	Description	Amount	Active	Change	Bank ID	No.	EFT Type	Show	P10	P10 Acc	D1	Act	Holiday	No.	Change Cr.	Backlog Description	Act
01	Banked Receipts	0.00	Y	N													
02	Customer Other Card	0.00	Y	N					CCARD								
03	Cash	0.00	Y	N						1000000							
04	Bank Draft Cheque	0.00	Y	N													
05	EFT - Australian EFTPOS	0.00	Y	N						EFTPOS							
06	Customer Draft Cheque	0.00	Y	N						DRAFT							
07	Gift Voucher	0.00	Y	N							20000						
08	Cash	0.00	Y	N													
09	Master Card	0.00	Y	N													
10	Customer Other Card	0.00	Y	N													
11	Customer Assisted Cheque	0.00	Y	N													
12	Cheque	0.00	Y	N													
13	Customer Receipt	0.00	Y	N													
14	Gift Voucher	0.00	Y	N													
15	EFT - Unreconciled EFTPOS	0.00	Y	N													
16	Gift Voucher	0.00	Y	N													
17	Gift Card	0.00	Y	N													
18	Gift Card	0.00	Y	N													
19	Gift Card	0.00	Y	N													
20	Gift Card	0.00	Y	N													
21	Gift Card	0.00	Y	N													
22	Gift Card	0.00	Y	N													
23	Gift Card	0.00	Y	N													
24	Gift Card	0.00	Y	N													
25	Gift Card	0.00	Y	N													
26	Gift Card	0.00	Y	N													
27	Gift Card	0.00	Y	N													
28	Gift Card	0.00	Y	N													
29	Gift Card	0.00	Y	N													
30	Gift Card	0.00	Y	N													
31	Gift Card	0.00	Y	N													
32	Gift Card	0.00	Y	N													
33	Gift Card	0.00	Y	N													
34	Gift Card	0.00	Y	N													
35	Gift Card	0.00	Y	N													
36	Gift Card	0.00	Y	N													
37	Gift Card	0.00	Y	N													
38	Gift Card	0.00	Y	N													
39	Gift Card	0.00	Y	N													
40	Gift Card	0.00	Y	N													
41	Gift Card	0.00	Y	N													
42	Gift Card	0.00	Y	N													
43	Gift Card	0.00	Y	N													
44	Gift Card	0.00	Y	N													
45	Gift Card	0.00	Y	N													
46	Gift Card	0.00	Y	N													
47	Gift Card	0.00	Y	N													
48	Gift Card	0.00	Y	N													
49	Gift Card	0.00	Y	N													
50	Gift Card	0.00	Y	N													
51	Gift Card	0.00	Y	N													
52	Gift Card	0.00	Y	N													
53	Gift Card	0.00	Y	N													
54	Gift Card	0.00	Y	N													
55	Gift Card	0.00	Y	N													
56	Gift Card	0.00	Y	N													
57	Gift Card	0.00	Y	N													
58	Gift Card	0.00	Y	N													
59	Gift Card	0.00	Y	N													
60	Gift Card	0.00	Y	N													
61	Gift Card	0.00	Y	N													
62	Gift Card	0.00	Y	N													
63	Gift Card	0.00	Y	N													
64	Gift Card	0.00	Y	N													
65	Gift Card	0.00	Y	N													
66	Gift Card	0.00	Y	N													
67	Gift Card	0.00	Y	N													
68	Gift Card	0.00	Y	N													
69	Gift Card	0.00	Y	N													
70	Gift Card	0.00	Y	N													
71	Gift Card	0.00	Y	N													
72	Gift Card	0.00	Y	N													
73	Gift Card	0.00	Y	N													
74	Gift Card	0.00	Y	N													
75	Gift Card	0.00	Y	N													
76	Gift Card	0.00	Y	N													
77	Gift Card	0.00	Y	N													
78	Gift Card	0.00	Y	N													
79	Gift Card	0.00	Y	N													
80	Gift Card	0.00	Y	N													
81	Gift Card	0.00	Y	N													
82	Gift Card	0.00	Y	N													
83	Gift Card	0.00	Y	N													
84	Gift Card	0.00	Y	N													
85	Gift Card	0.00	Y	N													
86	Gift Card	0.00	Y	N													
87	Gift Card	0.00	Y	N													
88	Gift Card	0.00	Y	N													
89	Gift Card	0.00	Y	N													
90	Gift Card	0.00	Y	N													
91	Gift Card	0.00	Y	N													
92	Gift Card	0.00	Y	N													
93	Gift Card	0.00	Y	N													
94	Gift Card	0.00	Y	N													
95	Gift Card	0.00	Y	N													
96	Gift Card	0.00	Y	N													
97	Gift Card	0.00	Y	N													
98	Gift Card	0.00	Y	N													
99	Gift Card	0.00	Y	N													
100	Gift Card	0.00	Y	N													

## Management functions

Management functions allow your team to better monitor and manage store activities, from the simple opening of cash drawers to closing for the day's trading.

Cash drawer holdings can be viewed while the drawers are active so that your management team can examine cash balances and determine when cash needs to be cleared for security purposes. Balances can be monitored and easily maintained via the Retail Store Console.

Alerts can be emailed to designated managers when a cash drawer balance exceeds a defined cash limit.

Petty cash is easily transacted at POS and makes for efficient reconciliation and allocation at the back office. Adjustments to the cash drawer contents can be controlled by managers and cash removed from the drawer for secure holding or banking at any time.

The ability to list cash drawer transactions provides useful details to assist with the balancing of the drawer.

The end-of-shift process may be the end of the trading day, or any other designated time. Management has the option to enforce multiple levels of blind reconciliation for a more secure process that offers clear separation of tasks. Point of Sale can make corrections to tendering errors as part of the reconciliation process, avoiding unnecessary back-office reconciliation.

Advanced Tender Tracking gives managers the ability to control and monitor value sensitive tenders, such as gift vouchers, across the organisation. For example, a lost gift voucher can be deactivated so it is unusable, and reactivated if found. All changes are closely audited, providing total control.

Rep code password expiry dates can be set to ensure that codes are periodically updated and do not stay active once expired. This prevents staff from using the passwords of former employees to conduct fraudulent transactions.

The sales order reprint function can be controlled with the option to limit the ability of staff to reprint dockets without supervisor authority. Thus reprinted receipts cannot be used for fraudulent refunds and exchanges.

Screen layouts and features can be added, removed or changed and applied centrally for each individual cash drawer.

## POS screens made to measure

The graphic capabilities of Pronto Xi allow for a configurable POS screen. This provides significant workflow capabilities, improved branding and reduced staff training time.

Each screen is configured using the POS Theme Editor. Screens are cash drawer-specific, enabling a different screen (or screen type) to be assigned to each cash drawer, which may be useful in a multi-brand or 'split service' environment.

The Menu Editor allows workflow to be configured by creating a 'tree' structure. The 'Tree View' feature allows an instant preview of the menu's structure. The Tree View shows the starting point, the action and the ending point.

Menus can also be tested in preview mode. There is a range of template themes pre-configured with a supporting image library so cash drawers can be up and running straight away.

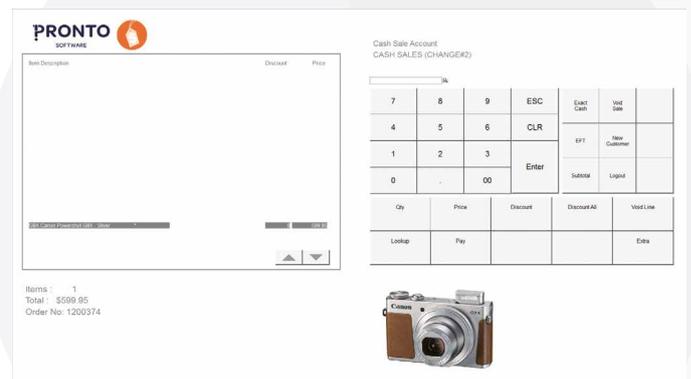
Pronto Xi POS makes it easy for operators to use 'macros' or short key entries to streamline their processing. Up to 80 macros are available to help retail staff optimise retail performance and access information instantly.

We've also made it easier to control this powerful feature by enabling retailers to place global security around macros, such as blocking staff from processing a discount macro on a whole order without a supervisor.

## Total control

Point of Sale contains powerful features for both enhancing customer service and mitigating shrinkage and fraud risk. The Retail Event Transaction Log allows retailers to take control of more than 65 POS-specific events, from the cash drawer opening, to cash clearance or issuing a large amount of change. Retail events are visible on the Retail Store Console for easy reference and management.

Each event can request reason codes from the operator, launch a custom program or even engage the Pronto Xi Alert Intelligence notification system. For example, the moment a staff member fraudulently tries to guess a supervisor's password, the supervisor can be notified via SMS.



Easy configuration of a POS skin to match your operations



## Group trading

Group trading is the preferred structure for organisations that provide a product or service to other businesses trading under a specific name or structure. Examples include franchises, buying groups or cooperatives.

In these situations, consolidating and managing data is a challenge. Group Trading provides this structure to better streamline your operations and ensure that the data is clean and reliable.

Key components of the Group Trading solution include:

- Head Office (master entity) to unique business (child entity) relationships
- Consolidated core inventory across the business
- Managing business royalty (franchise) fees
- Catalogue system
- Global purchasing system
- Global promotions engine
- Provisions for customer returns between separate businesses
- New stock requests
- New supplier requests
- Aggregated sales data

Providing a standardised methodology across your businesses provides confidence for you and them, as well as their customers.



# Pronto Xi eCommerce

## Add to your basket

Unlock the potential of online sales and support your omni-channel ecosystem with software that helps you deliver a secure, user-friendly shopping experience to your customers.

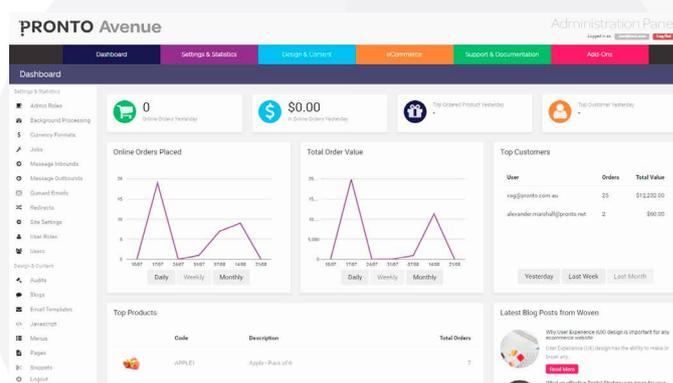
Pronto Xi eCommerce delivers a fully integrated portal for online transactions, allowing you to effortlessly bring your business to the world-wide web. From a simple user interface for the customer to a comprehensive management tool for the merchant, eCommerce seamlessly accommodates both B2B and B2C.

Customer, product category and pricing information from Pronto Xi are seamlessly integrated. Harness the power and flexibility of the Pronto Xi Retail Promotions engine within Pronto Xi eCommerce. From simple buy-one-get-one-free offers to specific threshold incentives. And with the flexibility of unlimited category structures, and the capacity to deal with detailed product information, you'll have advanced cross-sell options.

### Integration with Pronto Xi

Pronto Xi eCommerce accesses Pronto Xi via Pronto Connect through a set of APIs or application programming interfaces. This enables the two system to update information seamlessly.

Use the product information maintained in your Pronto Xi ERP system to create unlimited online categories. Sell to new or existing customers without creating custom interfaces. Take online orders, have them fulfilled from your warehouse maintained by your Pronto Xi system and allow online users to track their status.



Avenue has a powerful management console that builds on its seamless integration to Pronto Xi

## Intuitive and easy online shopping

With eCommerce, it's easy to differentiate yourself from your competitors by giving your customers a simple but effective interface to research and buy your products online. Using the inbuilt Content Management System (CMS), you can have:

- Customisable menus
- Self-service user management
- Secure online transactions
- A user-friendly shopping cart
- A flexible online freight calculator

Payment gateways for secure online transactions are pre-configured, including eWay, Securepay and Payment Express, and there is a built-in method for accepting PayPal payments.

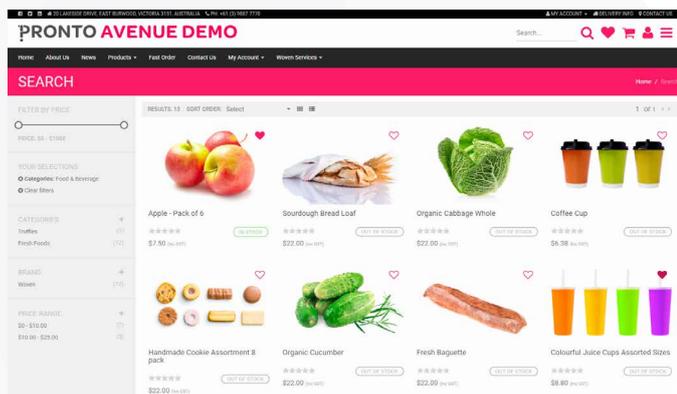
## Manage your own content

The in-built CMS allows you to publish standard pages and layouts and change them to suit your requirements.

Unlike specialised content management systems, the flexible Model View Controller-based architecture of eCommerce allows you to control almost all design elements available on the website. In addition to standard product descriptions, you can display more detailed information, images or downloadable content.

An intuitive search engine that looks at all products and pages available to the user simplifies your customer's shopping experience. Couple the search with a flexible layout to have searches displayed the way you prefer. In addition you can:

- Create unlimited online categories with images and notes
- Define any product against multiple online categories
- Have your web designer create your own layout
- Add your own unique pages such as news, blogs and FAQs
- Use Google Analytics to track website and Adwords statistics
- Maintain a store locator, with a link out to web-based map technology



Avenue provides a simple yet feature packed ecommerce experience

## Technology on rails

Pronto Xi eCommerce is built using the highly established and popular Ruby on Rails development platform, and comprises of an inbuilt CMS and integrated ecommerce engine within a single web application.

eCommerce utilises other industry standards such as CSS, Liquid Templates and Model-View-Controller architecture (for separation of application and business logic). It also employs an optimised message-based system for back-end communication and caches all data locally in its database to ensure 24/7 uptime.

## Get online fast

Pronto Xi eCommerce can be deployed easily and quickly, regardless of your specific requirements. Multiple packages are available, including full hosting, which negates the need for additional hardware. This means installations can be up and running in a matter of days.

At Pronto, we can also provide in-house web design expertise to help you create the optimum website.

Critically, eCommerce is solid enough to tackle the heaviest traffic without jamming. Ease of use and efficient design allows customers to get what they want, when they want it – and enjoy the experience.

## Integrate using APIs

Pronto Xi eCommerce can also be used as an integration layer by developers of external systems to make use of the inbuilt eCommerce engine. The fully documented API allows for eCommerce specific data to be available via REST APIs and sales orders to be seamlessly integrated back to the Pronto Xi ERP.

# Pronto Xi Repairs Management

## Good as new

Maintain the highest quality customer service by keeping on top of warranty claims and repair requests.

Pronto Xi Repairs Management makes it easy to validate repair claims by tracking the warranty status and serial number of your stock. Manage every aspect of repairs, from labour and parts to transfers and payments, and allocate charges based on warranty status, fault type or choice of repairer.

### Easy repair lifecycle

With Repairs Management, your staff can focus on the customer without needing to understand complex processes or rules. A clearly defined repairs lifecycle allows repairs to be easily tracked through different stages, located and processed with maximum efficiency.

### Repairs statistics

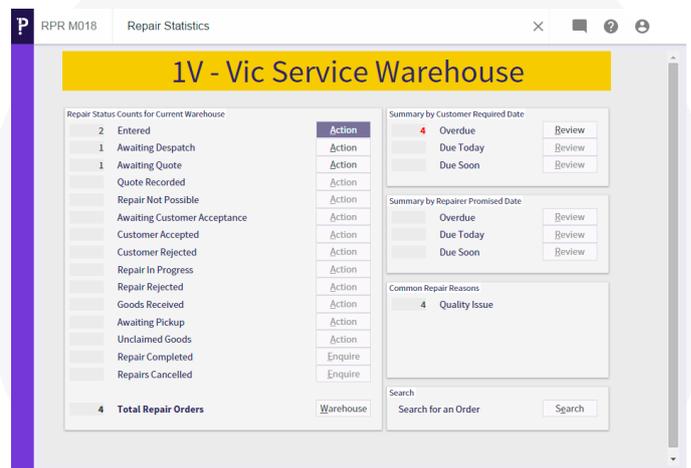
All of the information needed to manage the entire repairs process is at your fingertips. The Repairs Statistics screen shows at a glance the number of repairs at each stage of the process, including highlights of overdue and near due repairs.

At each stage, action buttons allow staff to quickly action a repair and advance it to the next stage without needing to worry about the mechanics of the process, reducing customer response times.

### Close process gaps

Repairs Management ensures nothing goes missing or is forgotten. Each repair is driven by expected dates and flagged if overdue. Order stages are augmented by detailed notes, ensuring important information is captured.

Key documents (such as a purchase order for the nominated repairer) are automatically created, ensuring data integrity. Spare parts and accessories are also tracked through the process, along with costs such as labour, and appropriate customer charges calculated. Serial numbered item history is also easily accessed.



A visual snapshot of repairs in the system for efficient enquiry and management

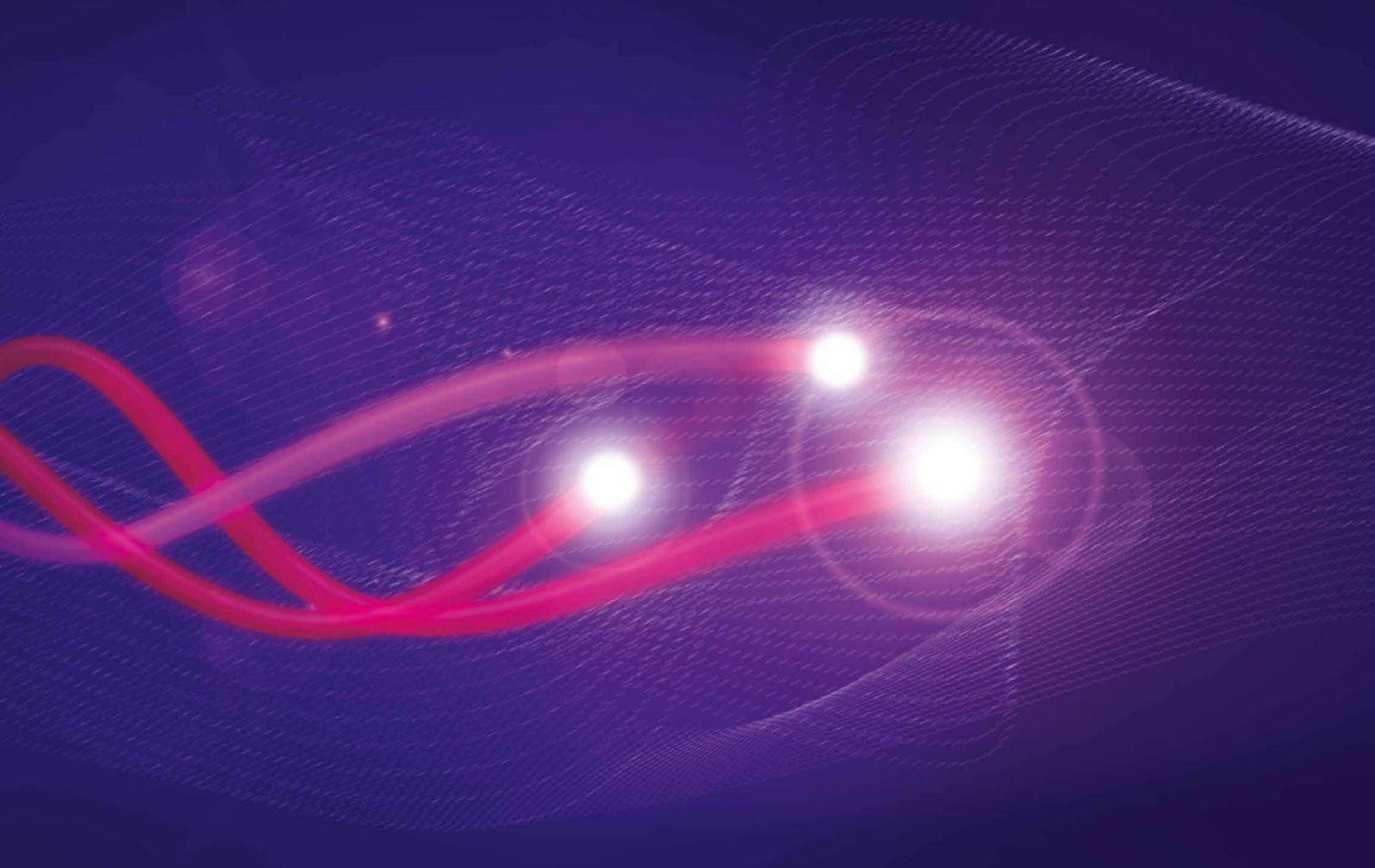
### Customer service

Repairs Management is designed with customer service in mind. Easy access to information and detailed tracking enables staff to either react quickly to an enquiry or proactively avoid problems.

An easy search facility using customer name/phone number means there is no problem if a customer forgets his or her paperwork. When repairs are entered and payments are required, the customer receives printed 'dockets' with all relevant repair details. Dockets can be easily customised with your own terms and conditions to ensure the customer is fully informed every step of the way.

**PRONTO WOVEN**

DIGITAL COMMERCE



Weaving  
together marketing,  
commerce and  
technology

[woven.com.au](http://woven.com.au)

# Pronto Xi CRM

## Take the lead

Maintain and strengthen all of your customer relationships from new leads to long-term relationships.

With Pronto Xi CRM (Customer Relationship Management), you'll be able to optimise revenue, profitability and customer satisfaction through improved management of operations and better communication with customers.

Analyse customer and prospect needs, as well as easily identifying customers who need the most attention. Discover which business processes work best to drive customer satisfaction and repeat business.

Advantages of Pronto Xi CRM include:

- A single point of reference for CRM functions, useful for sales representatives managing a pipeline
- Store and manage unlimited customers, prospects and companies
- Create, track and qualify leads, convert leads to opportunities
- Easily access and analyse detailed sales information about your customers and prospects
- Improved time management, with records of interactions and simple scheduling of day-to-day and follow up sales activities, which can be synchronised with Microsoft Outlook. See "Improving your Outlook" on page 29
- Easily track marketing efforts, with all activity updated dynamically and key information available at a glance



## CRM Console

The CRM Console combines all key CRM information into one central point. Designed for sales representatives, the CRM Console offers Account, Contact, Lead and Opportunity views, as well as a snapshot screen with a single view of key activities and the sales pipeline.

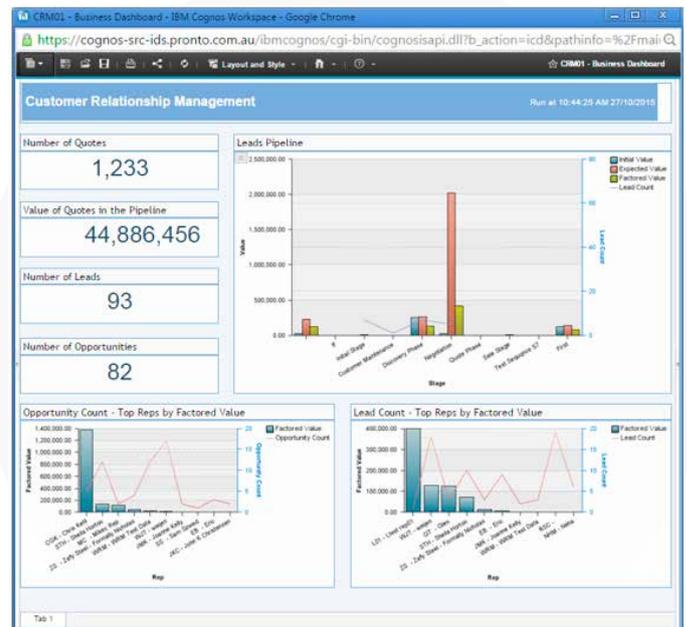
User-definable views and key search capabilities allow you to quickly and easily locate the information you require in a succinctly presented, graphically rich format.

Transactional information (such as incoming calls, information sent, etc.) can be accessed at high speed in real-time to provide your organisation with the most up-to-date and relevant customer information possible.

## CRM Business Dashboard

To enhance the visibility of CRM across your enterprise, a pre-configured Business Dashboard provides key performance metrics empowering you to stay abreast of sales activities. These 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 reps in the business



CRM business dashboard provides a snapshot of the pipeline

## Address book and contact manager

Day-to-day customer management is centralised, so you're able to access all the customer-related functionality of Pronto Xi from the module's intuitive screen. Vital customer information, including statistical information such as the date of the last sale, last mail-out and next action date, is clearly displayed.

Information about an unlimited number of customers, prospects and companies can be categorised and accessed according to:

- **Organisations** – Where the company is a current customer, the usual Pronto Xi sales enquiries are available directly from the main screen, giving sales representatives or customer service personnel all the historical and status information they need directly, without the need to access Pronto Xi Accounts Receivable.
- **Contacts** – Stores details such as email address, mobile phone number, home phone number and position description for an unlimited number of individuals or contacts for each unique organisation.
- **Security** – A number of security masks are built into the main screen to restrict customer modification to authorised users.
- **Parent/Child** – Links together multiple related companies to give you a view of holding companies or departments with multiple subsidiaries

Attribute	Attribute Description	Value	Group	Group Description	Date	Value Description	▲ Attrib...
AGE	Year started photography?	2010	77	Mandatory attributes			77.003
CRM	Favorite city to photograph?	MELBOURNE	77	Mandatory attributes			77.004
FT_TEAM	Favorite camera brand?	ARG	77	Mandatory attributes		Canon	77.005

## Attributes

These are the customer and prospect characteristics that your organisation wishes to store, manage and data mine. For example, the number of staff, sales turnover, competitors' details, customer interests, item groups, competitive advantages... or a simple Christmas card mail indicator. Attribute groups can also be created for hierarchical management.

Any number of attributes can be assigned to each company, providing the basis for segmenting your database and data mining.

Contact-specific attributes can be applied independently of company-level attributes. Attributes can be optional or mandatory, making sure the information you wish to capture is automatically prompted for when a new account is created.

## Sales management

### Leads

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

Multiple contacts from a company can be selectively associated with new leads and new contacts can be added. If the contact already exists in the database, duplicate entries can be removed or kept as separate entries, depending on your requirements.

Qualified leads can be selectively converted to opportunities, with all transactional history maintained.

### Opportunities

The opportunity management function of CRM helps your sales teams track the position and quality of each opportunity. This maximises their sales potential through clear views and quick access to information.

Specific contacts can be easily accessed from CRM accounts, with all transactional information and activity entries searchable from a single interface.

By creating 'opportunity quotations', there is a unique facility to quarantine quotations inside an opportunity and selectively convert them to 'live' quotations or sales orders. For high-volume quoting environments, this feature offers greater control over the sales process. Expected revenue can be managed by applying probability factors.

## ERP integration

Having CRM integrated with the wider Pronto Xi ERP solution provides increased functionality and ensures there's always 'one source of the truth'. This means that when interacting with customers, staff can:

- View up-to-the-minute transactions and account notes
- View current sales orders including processing status, eg. picking slip printed, order invoiced, etc.
- View and quote customer special pricing, quantity discounts or any other unique attributes
- View current inventory details and purchase order details including expected arrival dates
- Create a customer (COD) in CRM that writes a record in Pronto Xi Accounts Receivable
- View the credit status or any special conditions maintained within Pronto Xi Accounts Receivable
- Link to other functional aspects of Pronto Xi For example service based organisations can link to service calls of account customers managed in CRM

## Quotations and sales orders

If a customer requests a quotation, it can be entered against a company. When accepted, a quotation can be converted to a sales order and a basic (COD only) customer account is automatically created in Pronto Xi Accounts Receivable (security restrictions may apply).

CRM quotations are integrated with those generated in other Pronto Xi modules. This allows the copying of quotation details entered for one company to another company, with the company transaction logs updated with the quotation number.

Quotations can also be linked to specific sales campaigns, while unaccepted (lost) quotations are recorded for analysis.

## Customer and sales views

CRM records all information about past, present and prospective customers, giving your sales representatives full access to sales and transactional history.





## Improving your Outlook

If you rely on Pronto Xi CRM and Microsoft Outlook in your daily operations, you can now have them work seamlessly together. Synchronise your CRM data with cloud-based business applications such as Microsoft 365 or Google Apps for Work.

The exchange of information and activities improves the productivity of users, promotes data capture and increases the acceptance of CRM in your organisation.

Daily communication, contact details, tasks and calendar events are automatically synchronised between CRM and Outlook, decreasing overheads and ensuring that relevant information is always accessible to those who need it.

To enhance the user experience, the synchronisation supports:

- entering or managing contact information between systems
- sending out and recording emails for future reference
- creating new or updated tasks
- activity management via entering or updating
- calendar events
- export data to spreadsheet
- email using Outlook.com and Gmail.com
- automated updating without operator intervention
- standardised information across the enterprise
- user adoption through familiar interfaces
- improved and expanded reporting capabilities

## Transactions

### Transaction manager

All daily transactions can be reviewed and maintained. Each transaction is recorded by both the representative code and the login name to enable an audit trail to be followed. The data grid displays the transaction date and time, campaign, transaction type, response type, action category, target date and actual date, allowing the user to view exactly what happened at a given point in time.

### Send Info/Mail Merge

The Send Info option is used to create letters and/or print labels by utilising the mail merge facilities in word processing applications such as Microsoft Word. Templates can be created to enable direct merging from CRM. You can also merge sales orders and quotation data into these templates. Emails can be sent to multiple accounts and contacts with attachments.

When the Send Info function is used, transaction entries are written against the relevant CRM accounts.

## Notes and attachments

### Notes

With the Notes function, users can record notes by type against CRM accounts. Notes are searchable and can be filtered by type.

### Attachments

Any kind of file can be attached to individual contacts or companies. There is direct access from within CRM to images and documents that are related to the selected customer or prospect.

## Integrated search

Locating accounts, contacts and information via a keyword search or for example phone numbers is made simple for Pronto Xi CRM users. Critical information can be obtained in just a few keystrokes, giving sales representative or telephone operators fast access to an account's details.

If a single direct match is not found, all accounts that match the input criteria are listed. You can then select the appropriate account from the suggested list.

There is also an advanced search capability, including user-defined time-outs and result quantities, helpful where large volumes of data are involved.

## Integrated data mining

An integrated data mining tool enables you to discover meaningful correlations, patterns and trends in what may be large amounts of data. Information about your prospects and customers can be filtered using various selection criteria to produce reports and mailing lists.

A range of attributes can form part of the selection criteria and can be combined into complex logical expressions. Each list can also be refined using the Keep/Drop option to apply further selection criteria and various reports can be generated, including mailing labels and mail-merge lists.

## Activities

The CRM Activity Scheduler provides a simple way to organise all your activities, including the booking of appointments, callouts, meetings and more.

You can design the activity scheduler to suit your business's needs. Integration with Microsoft Outlook gives you the option to synchronise your activities to your Outlook calendar or the calendar of the nominated sales representative.

Activities can be recurring or managed in bulk, making it easy to move activities from one sales rep to another, or assign a group activity to all reps.

## Campaigns

You can use the CRM campaign functionality to manage and track campaigns or events, as well as track the performance of each representative.

Sales transactions, quotations, correspondence and activities can be linked to any number of campaigns. CRM stores the campaign statistics, enabling the measurement of campaign success against the budgeted cost and expected revenue.

## Web map links

Pronto Xi CRM has the ability to link out to web-based map technology. By clicking the relevant map link on the Pronto Xi CRM screen, a map or driving directions can be obtained quickly and easily from servers such as Google Maps.

The screenshot displays the 'Activity for Account : 5355 - COTTERILL CASSIMIR' form. The form is divided into several sections:

- Details:** Includes fields for Type (1), To Do Item (Sync Tasks), Rep Code (LBS), Contact (Mr Cassimir Cotterill), Campaign, Status (Entered), and Resolution.
- Priority and Show As:** Features radio buttons for Priority (Low, Normal, High) and Show time as (Free, Tentative, Busy, Out of Office).
- Subject and Description:** Contains fields for Subject (Lunch meeting with Marcellus Oswald), Description (Hi Marcellus, we need to discuss the takeover terms of the Rain Ti Buzz corporation today! cheers), and Location (Melbourne).
- Dates/Times:** Includes Action Date, End Date, and Reminder Date (all set to 22-NOV-2017 00:00), along with checkboxes for All Day Event, Recurrence, and a Reminder icon.

At the bottom of the form are 'OK' and 'Cancel' buttons.

# Pronto Xi Mobile Sales & CRM

## Always open, always closing

A good business relationship is based on open communication and ready responsiveness. So a Mobile Sales application that gives your staff easy access to customer Intelligence, real time product data as well as Customer Relationship Management (CRM) data while they're on the road can improve both.

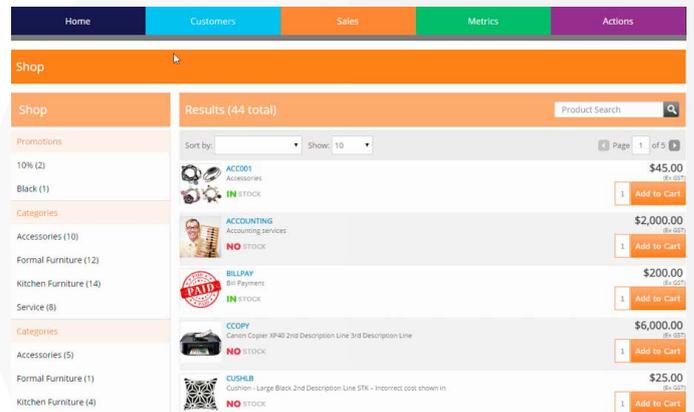
Mobile Sales is the ultimate companion for sales professionals in the field. With seamless integration to Pronto Xi CRM, Mobile Sales offers a complete customer profile view with access to sites, contacts, transactions, client attributes and the ability to maintain scheduled and ad hoc activities on the road.

Through its advanced business-to-business (B2B) capability, it's easy to enter sales orders or quotations that adhere to business standards and controls such as credit limits, restrictions and customer specific pricing. Sales professionals can review outstanding orders and balances to provide a well-rounded and more informed service to their clients.

For the business-to-consumer (B2C) market Pronto Xi Mobile Sales also delivers full shopping cart and payment gateway features so that your representatives have all the Information and features they need to make the sale and take payment by credit card.

A powerful mobile sales rep console with a customised dashboard makes it easier to track progress and remain on target. Reps can see their top clients, products and prior sales at a glance, as well as their sales progress MTD and YTD.

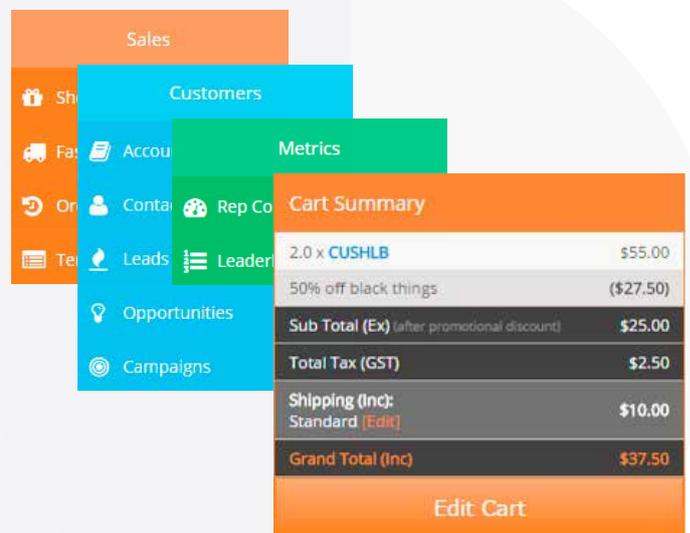
Pronto Xi Mobile Sales is an innovative, intuitive solution that is accessed via a web-based portal, making it easy to deploy.



Get a complete view of stock on hand, and boost your sales out in the field with full shopping cart features

The advantages of Pronto Xi Mobile Sales include:

- Browser based - responsive web design
- Context sensitive
- Lead, Opportunity and Account features
- Product Search and Filter features
- Rep Dashboard highlighting Top 5 Customers, Top 5 Selling Products, Rep Activities, Recent Sales and other critical data
- Inbuilt Metrics with Rep Console and Rep/Accounts/Product Leaderboards
- Product browsing - Includes Inventory levels and pricing details
- Fast Order entry with template and order copy features
- Customer Order History and visibility of account ageing balances



Stay informed wherever you are with instant sales metrics, monitor leads and opportunities and gauge the success of marketing campaigns

A woman with blonde hair, wearing a yellow shirt and a dark vest, is shown in profile, looking towards the right. She is sitting at a desk with a computer monitor and keyboard. The background is bright and slightly blurred, suggesting an office environment. A large, light gray circle is overlaid on the lower half of the image, containing text.

## The right call

We're always ready to adapt Pronto Xi to perfectly fit your unique requirements.

For more information on what we can do for your business, contact us at 1300 PRONTO (1300 77 66 86) or find us at: [www.pronto.net](http://www.pronto.net)





info@pronto.net  
1300 PRONTO (1300 77 66 86)  
Find your moment: [www.pronto.net](http://www.pronto.net)

Connect with us

-  [@ProntoSoftware](https://twitter.com/ProntoSoftware)
-  [pronto-software](https://www.linkedin.com/company/pronto-software)
-  [youtube.com/ProntoSoftware](https://www.youtube.com/ProntoSoftware)

### Tailor-made business software solutions.

Pronto Software has been developing award-winning business management software for 40 years. With in-built intelligence, flexibility and an easy-to-use interface, its flagship product, Pronto Xi, enables users to discover rich business insights.

Pronto believes in the power of actively listening to clients, adapting our product to meet their needs and finally revealing the best solution. It's how we continually surpass client expectations, delivering moments of utter surprise and delight.