

PRONTO xi



Asset & Facility Management
Simplified services

© Copyright 2018 Pronto Software Limited.
All rights reserved.

740 Solutions
Overview: Asset & Facility Management

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.

Asset & Facility Management

Contents

4	Simplified services	26	Pronto Xi Service	40	Pronto Xi Mobile Service
4	All together now	26	Integration	40	Fast in the field, fast in the office
6	Pronto Xi Project	27	Intelligence	41	Streamlined data capture
6	Intelligence	28	Contracts	41	On the road or in the basement
7	Project workflow	30	Service calls	41	See what to do, show what you've done
8	Project types	34	Predictive Q&A hierarchy	42	Safety first
9	Project lifecycles	34	Preventive maintenance	42	Mobile Service invoice process attributes
10	Close-out rules	35	Location by site equipment	42	Smart and easy
11	Relationships between projects	36	Service distribution integration	43	Predictive Q&A
11	Cost management: Cost Breakdown Structure (CBS)	36	Service call maintenance desktop	44	Serial attributes
14	Project Tasks	36	Selective contract and call enquiry	45	Service in, service out
16	Scheduled project claims	37	Engineers	46	Pronto Xi Service Connect
18	Income	37	Linking engineers to Resource Management	47	Manageable customer access
19	Profit	37	Linking equipment to engineers in Resource Management	47	Improved customer service
19	Project management tools	37	Maps	48	Pronto Xi Maintenance Management
20	Sub-contracting	38	Pronto Xi Service Scheduler	48	Equipment register
22	Project manager limits, security and credit checking	38	Complete visibility of unallocated calls and engineer activity	49	Preventive and predictive maintenance
23	Time recording and timesheet entry	38	Easy drag and drop allocation of calls to engineers	49	Work Order fault reason code
23	Project to Service call creation	39	Completely customisable	49	Return Pick to alternate warehouse
24	Pronto Xi Tender Management	39	How Service Scheduler works	50	Component change out
		39	Directions and maps	51	Work order management
				53	Inventory management
				53	Intelligence
				54	Pronto Xi Rental
				55	Financials
				55	Charges
				56	Contract lifecycle
				56	Fixed asset units
				57	Contract invoicing
				57	One-off invoices
				57	Billing cycle
				57	Payment reminders
				57	Tracking

Asset and Facility Management

Simplified services

Get your people, processes and assets working in perfect harmony.

Handle the full life cycle of your service calls efficiently within an intuitive, easy to use Mobile web app. Share all customer call information through a user-friendly web portal. Customise and automate your project management processes so you can focus on the job at hand without getting buried in paperwork.

Minimise your callers' waiting by keeping track of high priority service issues, customer service history, warranties and monitor time critical customer SLAs.

Reduce breakdowns and service costs by making sure your equipment is in top shape, and ensure you're ready whenever something goes wrong.

Keep track of rental products, including current rental status, service and rental history, and asset depreciation, with a fully integrated system.

Analyse and take action to optimise service operation and project performance using Pronto Xi Business Dashboards for Service and Project. These dashboards deliver an at-a-glance insight into key performance metrics important to your business operations.

All together now

All of the core modules are fully integrated with Pronto Xi, delivering solid gains in your overall efficiency and productivity.

Pronto Xi Project makes it easy for you to track a project at a task level from quotation through to completion, with many of the tedious areas of project quotation automated.

Pronto Xi Service takes care of daily tasks – from contracts to call allocation and invoicing to reporting – so you can focus on providing exceptional care for your clients.

Pronto Xi Service Scheduler dramatically increases the operational efficiency of your service centre by optimising dispatcher productivity with up-to-date call status and easy engineer allocation.

Pronto Xi Mobile Service extends service activities to field technicians undertaking planned or unplanned tasks. With so many points of management in a service environment, it's imperative to streamline business processes from entry through to completion. Mobile Service delivers features critical for both B2B and B2C service organisations and is now part of the single ecosystem, ensuring consistency while decreasing complexity for the business.

Pronto Xi Service Connect is specifically designed for the service industry. It enables customers to track their own service calls and enter information via a secure web portal, streamlining data management.

Pronto Xi Maintenance effectively reduces your company's maintenance and operating costs by maximising planning and control of your plant maintenance activities.

Pronto Xi Rental helps you streamline your rental processes. Rental contracts are fully traceable and integration with Pronto Xi Financials makes invoicing simple.



Pronto Xi Project

Smart money

Steer clear of profit-eating administration costs by ensuring accurate quoting and cost management.

In any business that relies on quoting, profitability comes down to completing the job within the estimated budget and time frame. Project lets you focus on getting the job done by automating the tedious areas of project quotation, giving you greater control of costing procedures.

By integrating with other Pronto Xi modules, you'll be kept up to date with work orders, sales orders and service calls, minimising unforeseen costs.

Key functionalities include:

- Multiple cost centres and budgets per project
- Full Cost Breakdown Structure (CBS) for greater cost granularity
- Project Tasks and milestones deliver more control over project activities and deliverables
- Export Project Tasks to MS Project 2013 for visualisation and manual rescheduling
- Flexible progressive invoicing or via Claim Schedule
- Create Project parent/child hierarchies up to 20 levels deep
- Customisable profit take-up and release rules
- Flexible timesheet entry and integration with Pronto Xi Payroll

Intelligence

Keep your projects on track using Pronto Xi Business Dashboard for Project. Quickly identify how projects are performing and how they are likely to track over the medium and long term. Key performance metrics are included to help you gain this visibility at a glance:

- Project profit, income and costs per year
- Unpaid claims
- Claims to be submitted
- Claims to be certified
- In progress cost to complete by branch
- In progress project count
- Total contract amount by project type

An extended library of Business Intelligence metrics is also available. Pronto Xi Analytics Dimensions for Project provides a prebuilt hierarchical data format to allow effortless analysis and intuitive investigation with drill-up and drill-down data exploration. Pronto Xi Analytics Dashboards provide an extended library of prebuilt report and performance metrics to help further drive improved Project performance.

Project workflow

When creating a quotation or responding to a tender, you can define a hierarchical Cost Breakdown Structure (CBS) for all related labour and materials. Simply apply margins to each element to formulate a detailed Claim Schedule, which can be used as the basis for billing. Project Tasks can then be set up to define the activities, resources and commitments required to carry out the project phases.

Once the project is in progress, costs incurred and income earned can be tracked. Full integration with other Pronto Xi modules like Accounts Payable and Purchasing allows you to record the project and cost category against any purchase order or supplier invoice.

Purchase Orders for required materials can be raised directly from the project budgets and applied to each relevant Task, ensuring that all commitments are managed in conjunction with the project activity or deliverable. Purchase Orders can be consolidated to help save on shipping costs and materials can be held in a dedicated warehouse until due on site.

Where items are to be built specifically to be consumed by the project, Pronto Xi Project can create Manufacturing Work Orders based on a standard Bill of Material or allow for customised configurations using the Pronto Xi 'Sales Configurator' tool.

Labour expenses and equipment hire is recorded through timesheet entry as Project is integrated with Pronto Xi Payroll and the Fixed Asset module. Where on costs are applicable, Pronto Xi Project automates the postings of Payroll On Costs to the project so that the true cost of a resource is accounted for.

Throughout the life of the project you can examine costs and income for each cost category or against the Master Item details referenced by the project. This means you can easily compare the information to your original budgets.

Project tightly controls variations to the original quotation. You can enter provisional variations, submit these to the customer, record them as rejected or approved and modify the budgets accordingly.

The Master Claim Schedule can also reflect these costs and income against the original item list or any items defined for the variations of the project.

Order Date	Order No.	Order Suffix	Document Type	Status Desc	MFL	PO Order T.	SQ Cost	WO Qty Or	Account	Account Name	Reference
13-JAN-2015	13969		PO	1801 3900	MEL	93.15			KASJDN	Kaiser Plastics Pty Ltd	
13-JAN-2015	13970		PO	1801 3900	MEL	1600.00			AACJAB	A.A.C. Coaters	
13-JAN-2015	13971		PO	1801 3907	MEL	26.81			BARJGGA	Barnes Crafts	
20-JAN-2015	20726		PO	1801 3948	MEL	900.00			ZAKSPP	ZAKSPP	
20-JAN-2016	24012		PO	Centre Cart	MEL	4000.00			ERCA	Erica Ltd	
20-JAN-2016	24013		PO	Centre Prod	MEL	2000.00			ERCA	Erica Ltd	
20-JAN-2016	24013 VA		PO	Centre Prod	MEL	400.00			ERCA	Erica Ltd	
20-JAN-2016	24013 VB		PO	Centre Prod	MEL	400.00			ERCA	Erica Ltd	
20-JAN-2016	24013 VC		PO	Agreement Bag	MEL	213.00			ERCA	Erica Ltd	
20-JAN-2016	24013 VD		PO	Centre Prod	MEL	500.00			ERCA	Erica Ltd	
04-OCT-2016	24541		PO	Centre Prod	MEL	500.00			ERCA	Erica Ltd	
04-OCT-2016	24544		PO	Centre Prod	MEL	500.00			MNSUPP1	42121	
19-DEC-2016	24906		PO	On Order	MEL	80.00			ARC	HEBMANCOAS	
28-FEB-2017	1200327		BO	Ready for Pickng	MEL	19.00			1323	Attn Engineering Pty Ltd	

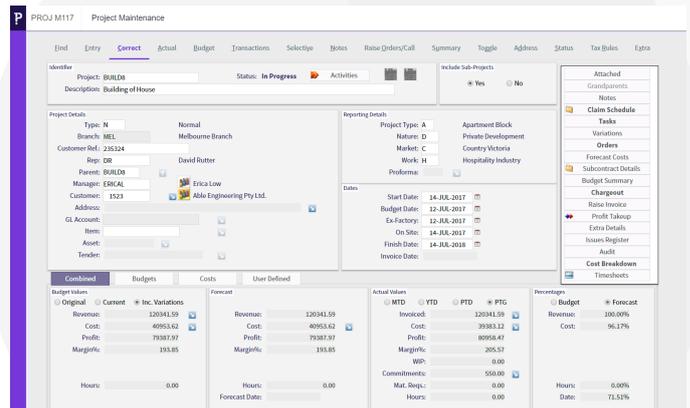
See every order in a project, then sort and filter by any attribute

Project types

A project can be any work undertaken by your company over any period of time. It is either performed for a customer defined in Pronto Xi Accounts Receivable or posted to a general ledger or fixed asset account.

Project allows for a number of project types, including:

- Contract
- Time and materials
- Asset Creation
- Enhancement
- General Ledger Cost
- Cost Tracking
- Warranty
- Rework
- Manufactured (requires Pronto Xi Manufacturing Management)
- Plant Maintenance (requires Pronto Xi Maintenance)
- Service (requires Pronto Xi Service)



Project lifecycles

A project goes through a number of stages between its creation and its completion, with each stage represented by a different 'status'.

Raise a quotation

Quotations can be generated based on estimated costs, with the details of the customer and nature of the project recorded.

Modify quotation

At the negotiation or re-evaluation stage, quotations can be easily modified. If costs are incurred before the final sign-off of the budget, they are recorded before the project is moved to the status of 'in progress'.

Accept/reject quotation

Once the quotation is raised, it must be either accepted or rejected. An accepted quotation becomes a project in progress, while a rejected quotation is archived as a lost quotation.

Setup

During the setup stage, initial project details can be captured. Some costs can be recorded against the project, and original cost estimates can be revised.

In progress

Once a project is in progress, costs incurred can be recorded against the project, invoices generated, variations processed and profit taken up.

Close the project

When a project is completed, the close-out operation calculates its final profit/loss (profit can be taken up to a nominated account in the general ledger) and its status is changed to 'finished'.

The close-out operation is not reversible, although sub-projects can be attached to a closed parent project.

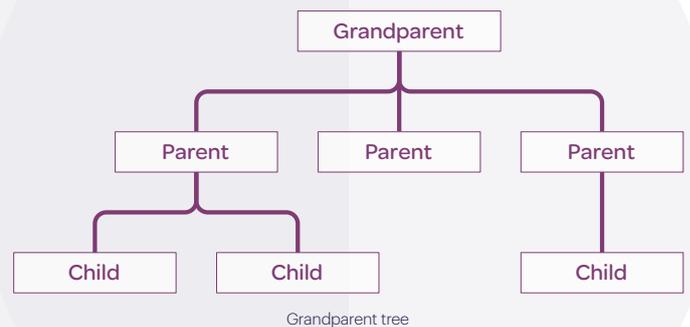
Close-out rules

Close-out rules and different posting rules can be set according to different types of projects and locations, affording flexibility to companies who need it.

For example, you can enforce 'Contract' projects to be fully invoiced to the contract value before close-out. However, you may prefer the invoiced value for 'Time and Materials' projects to be determined by their costs.

Up to 11 close-out rules can be applied to projects, including:

- Prevent closing if it is not fully invoiced according to contract value
- Prevent closing if purchase orders are not both received and invoiced
- Prevent closing if Work in Progress is not cleared
- Prevent closing until all variations are approved
- Run a system integrity check upon closing
- Use a defined method of profit take-up used at closure, or define that no profit take-up is used at all



Relationships between projects

Project allows you to build a hierarchy of projects for enquiry, reporting and invoicing purposes. Up to four levels in the hierarchy are available, with up to 20 levels of child projects available under the Grandparent/Parent hierarchy:

- **Grandparent** – These are the highest-level projects, available only for enquiry purposes. Pronto Xi rolls up the budgets and actuals of the lower-level projects attached.
- **Parent** – These projects can have sub-projects attached as lower-level projects, with the budgets and actuals rolled up to the parent project for enquiry and reporting. If invoicing of the customer is done at this level, costs from the parent and sub-projects are aggregated, mark-up is applied and the parent project is billed.
- **Child** – These are sub-projects that are attached to a parent project, but with their own budgets and scheduling. Costs may be posted directly to sub-projects, with invoicing done at the parent or child level.
- **Adult** – These are projects established independently, with no relationship to other projects

Cost management: Cost Breakdown Structure (CBS)

Project provides accurate and timely cost control of projects. The Cost Breakdown Structure (CBS) allows for a greater level of costing granularity, cost allocation and margin management.

This sequential framework of activities and their related costs mean that Project Managers can itemise and prioritise works within a Cost Category to assist in scoping, quoting and tendering of major or minor projects.

Multiple CBS levels can be linked to a Project Task to align material commitments and resource requirements with activity timeframes. Breaking down costs within a hierarchy structure of this type gives greater control when applying mark ups, factoring variations or managing project budget vs actual analysis.

To further ease the quoting process, Pronto Xi includes a 'Copy to Claim Schedule' option so that detailed cost structures can be passed directly to the Claim Schedule area. This ensures greater consistency across the project and delivers the foundation elements for quoting and invoicing that can include the lowest element within the cost hierarchy.

Other benefits include:

- Consolidation of multiple CBS structures when tendering for multi-site opportunities
- User defined CBS row colours for better visualisation and segment differentiation
- Upload CBS structures from MS Excel
- Automation of actual cost disbursement across CBS elements
- Ability to copy CBS structures from other projects
- Visibility of linked Task percentage complete
- Identify and minimise potential cost overruns while the project is in progress
- Generate more accurate quotations, cost tracking and/or service warranties

Cost categories

You can choose to group certain types of costs within a project into cost categories. Each category can then have separate budgets and cost totals assigned to it to assist with budgeting and analysis.

Variations

Variations to the original project can be made and/or managed using Project.

Costs

There are various ways you can incur direct costs against a project:

- Sub-contracting
- Purchasing
- Supplying inventory to the project
- Posting a supplier's invoice
- Posting direct journals
- Using timesheets

Inventory can be issued to a project via a direct inventory issue, a sales order, a purchase order or a supplier invoice. A timesheet entry function records costs for both labour and equipment hire, including overhead cost generation. To record indirect costs, journal entries can be against projects using the journal functions of Pronto Xi Financials.

Monthly summary

Project stores data in monthly buckets each time a transaction is processed against a project. This dramatically increases the efficiency of enquiry functions.

P PROJ M117 Cost Breakdown Structure

[Entry](#)
[Correct](#)
[Remove](#)
[Recalculate](#)
[Update Budget](#)
[Markup](#)
[Sequencing](#)
[Allocation](#)
[Update Costs](#)
[Notes](#)
[Budget Detail](#)
[Tasks](#)
[Extra](#)

Details
 Project: SDC4 CBS+TASKS Copy Project Change Branch Variation No:
 Customer: ABC The ABC Trading Company Version No:

Current View: **Standard**

Sequence	Description	Cost Ca	UOM	Qty	Hours	Unit Cost	Cost Per	Cost	Total Cost	Cost Allocation	Actual Cost	Tasks % Complete	Percentage Me
1	East Building								46070.50	0			
1.1.1	Joinery								31620.50	0			
1.1.1.1	Joinery - Reception								12300.00	0			
1.1.1.1.1	Counter & signage	MJNR	EACH	1.0000		12300.00	1	12300.00	12300.00	1	2778.08	15.00%	15
1.1.1.1.2	Joinery - Staff Cafe								19320.50	0			
1.1.1.2.1	Kitchen Cabinets	MJNR	EACH	2.0000		6850.25	1	13700.50	13700.50	1	3094.40	15.00%	25
1.1.1.2.2	Tables	MJNR	EACH	4.0000		980.00	1	3920.00	3920.00	1	885.38		27
1.1.1.2.3	Chairs	MJNR	EACH	20.0000		85.00	1	1700.00	1700.00	1	383.96		25
1.1.1.3	Joinery - Kitchen								0				
1.1.2	Electrical Services								14450.00	0			
1.1.2.1	Lighting								0				
1.1.2.2	Power & Communications								14450.00	0			
1.1.2.2.1	Data cabling	MELE	M	1800.00		4.25	1	7650.00	7650.00	1	3556.66	85.00%	30
1.1.2.2.2	Power cabling	MELE	M	2640.00		1.25	1	3300.00	3300.00	1	1534.25	85.00%	25
1.1.2.2.3	Test & Tag	LOHS	EACH	1.0000		3500.00	1	3500.00	3500.00	0		85.00%	25
1.1.3	Fire Services								0				
2	West Building								0				

Project Maintenance

Manage detailed budgets and cost allocation routines using the Cost Breakdown Structure

Project Tasks

Project Tasks provide Project Managers with greater ability to manage projects by activity and duration. By attributing a Task to a specified element within the Project Cost Breakdown Structure (CBS), Pronto Xi Project brings budgeted cost estimates together with activity details necessary to get the job done on time and on budget.

Project Tasks deliver more accuracy and insight into the progress of a project by percentage completion and/or Status of each individual Task. Under a Task structure, Project Managers can plan and organise deliverables in accordance with critical milestones, ensuring that preliminary Tasks are complete before subsequent Tasks begin.

Importantly, Project Tasks delivers the framework needed to efficiently allocate resources – whether personnel/ employee, plant or contractors – to Tasks whilst managing the communication between them.

So as timeframes change, and milestones are impacted, Pronto Xi Project can deliver the instant notifications required to keep all allocated resources fully informed.

Attach Purchase Orders, Material Requisitions, Resources and CBS elements to Tasks allowing for better tracking and commitment reconciliation at the activity level.

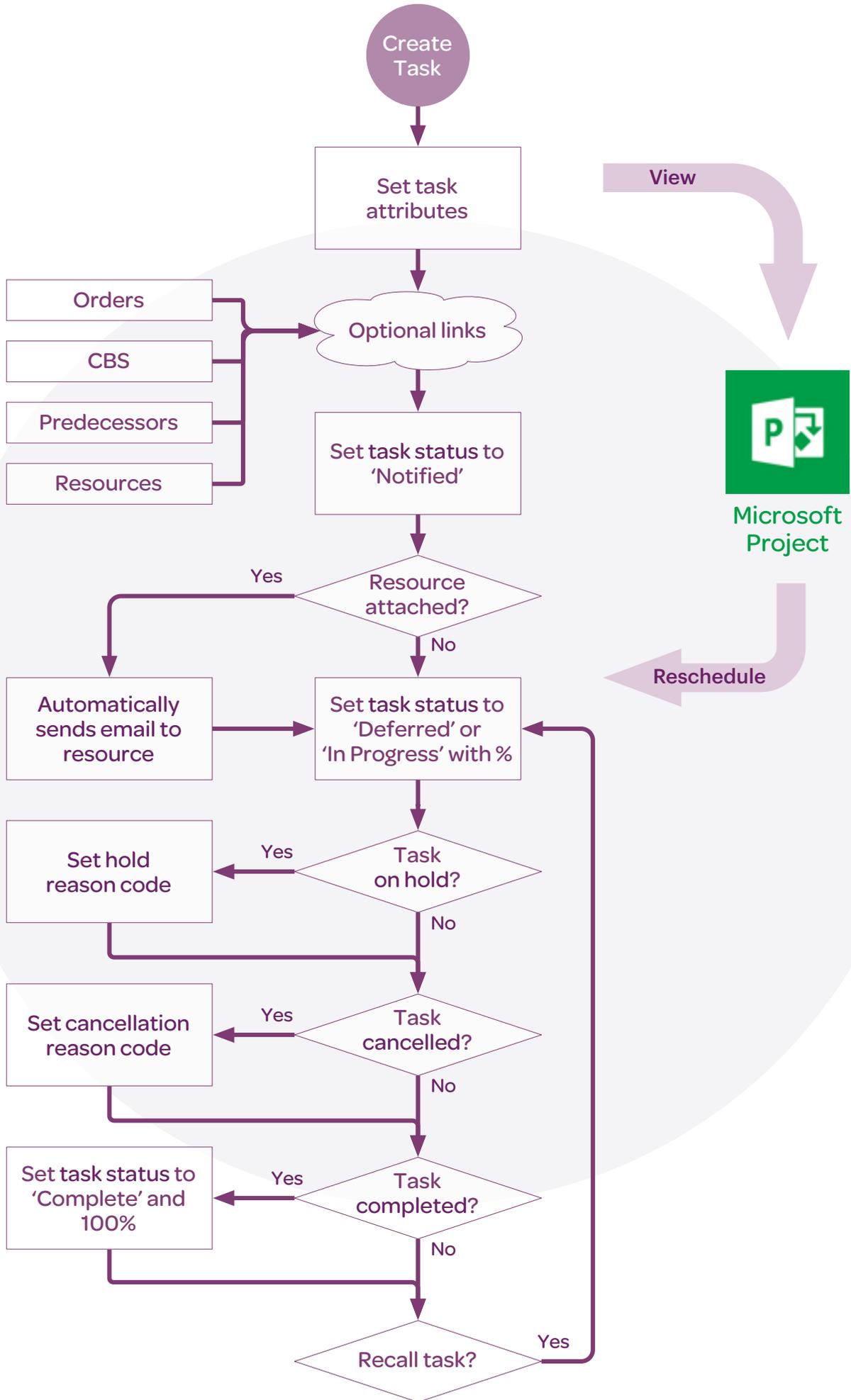
Plan and execute project delivery in line with critical milestones with Project Tasks

Project Task Calendar entries

You can email key project task details to allocated staff in advance of the scheduled work. You can also attach calendar appointments that include the project task details.

Other key features of Project Tasks include:

- Intuitive and logical Task workflow
- Export Tasks to MS Project for graphical visualisation and Task rescheduling
- A Rescheduling tool that automatically reschedules Task timeframes and Resources where capacity clashes are identified
- Copy a Task profile from an existing Project
- Linked Tasks to create dependencies so that a subsequent task may not commence until the predecessor task is complete



Visualise and reschedule planned Tasks using Microsoft Project, then import your final plan back to Pronto Project

Scheduled project claims

Pronto Xi Project Claims Schedule creates invoices to bill a customer for a project and can be used to develop the project budget.

Customer claim entry

Once the project moves to the status of 'in progress', work begins and the project manager can raise claims to receive funds from the customer.

There are three claiming methods facilitated by the Claim Control function:

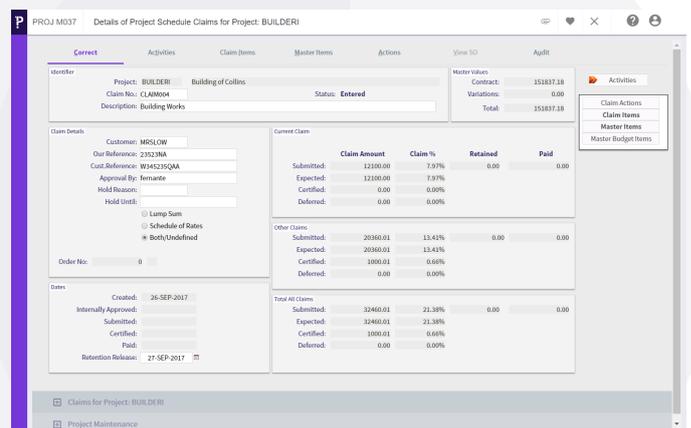
- **Invoice Method** – A direct invoicing method that doesn't take into account any certification or Progress Claim
- **Progress invoices** – An invoice is based on cost for time and materials, defined project stage completion, or percentage completion
- **Progress Claim** – A sales order invoice is created, but the order back from invoicing and tax presentation is held until the claim is certified

Certification difference control claim

Various methods are available for certifying claim amounts. The Defer method records the difference as a separate amount on each claim item for later discussion with the customer and possible offset in the future.

Customer claim retention percentage

Retention percentages for the overall project and for each claim can be defined to ensure that the customer does not attempt to retain more than the agreed values.



Create customer claims at any stage of a project

Claim entry

Claims can be entered either manually or in bulk via an amount or percentage. These values can be defined against each master item or against any of the sub-total or grand-total lines of the claim, which will then be applied pro rata across the appropriate sections of the claim.

Claim lifecycle

A typical claim lifecycle progresses from 'Entered' to 'Internal Approval', 'On Hold', 'Submitted', 'Certified' and 'Paid'.

Actions

Actions record the various events for a claim, including status changes and other manual events that can be entered to add value to the claim process. To assist project managers when reviewing a project, each action can have a set of notes to describe details, such as phone calls, letters and faxes.

Certification

A submitted claim is sent to the customer for their review and approval prior to them returning a Payment Advice. This document states the claimed, assessed, retention and any prepayment drawdown amounts defined by the customer.

These details are entered against the claim via the certification process where any differences are recorded against the claim details.

Customer retention release

If the customer has retained any funds during the claim process, they can be requested for release via a Retention Release order. This can occur at any time during the project but typically happens near its finalisation.

Claims enquiry

The Claims Enquiry screen makes it easy to find claims by allowing a variety of powerful search parameters to be defined, including dates, status, types of claims and claims that have variations.

Income

As well as capturing incurred costs, Project records income earned. Income is recognised by posting an invoice in Pronto Xi Accounts Receivable, manually raising a sales order or generating a progress invoice or claim.

Invoice income category

Income transactions are posted to the project as a 'credit' in an income category. You can have multiple income categories on a project.

Progress invoices

As a consequence of recording costs against a project, Project calculates cost-based invoices for time and materials projects. Invoices can be generated in stages using an invoice schedule of either a fixed amount or a percentage complete.

Progress claim

This method creates a sales order invoice but holds the order back from invoicing and tax presentation until the claim is certified.



Profit

Progressive profit take-up is often used on long-term projects. Project uses a 'percentage of completion' method to determine the amount of profit to take. If none is taken up during the life of the project, 100% of the profit will be taken up when the project is closed.

Profit take-up methods

To suit different types of projects, there are four available methods for taking up profit:

- **Cost-based method** – assumes that the true completion status of a project is best measured using the actual costs as a percentage of the forecast cost
- **Sales-based method** – assumes that the true completion status of the project is the amount invoiced against the contract value
- **Actual-based method** – assumes a project is 100% complete and therefore takes up all actual values
- **Cost/Sales-based method** – uses the cost-based method to calculate the percentage complete, but does not allow you to take up more revenue than you have invoiced

Posting rules

Project allows you to set up different posting rules to Pronto Xi General Ledger based on user-definable fields and project types. This gives you the flexibility to ensure postings end up in the correct balance sheet or profit and loss statement according to your company's general ledger requirements.

Project management tools

Contacts and functions

Communication between the project team and your customer is facilitated by the Contacts and Functions feature, which records the names and details of people associated with the project on both your and your customer's side.

Issue register

The issue register provides a list of administrative events and activities that need to be held and performed on a project.

Individuals can be assigned responsibility for the events and activities. To assist them, the My Issues function allows issues and actions across multiple projects to be reviewed and any that are becoming due can be shown in calendar view.

Sub-contracting

Project Sub-contractor is a sub-module providing a series of functions and controls to initiate and manage outsourced project tasks.

Supplier agreements

Sub-contractor or supplier agreements create a commitment for the project that can be broken down across multiple cost categories.

Project managers can capture details of the tasks performed by sub-contractors as:

- scheduled rates or lump sum payments
- retention percentages, currency codes, estimated start and end dates, and more

Sub-contractor claims

Claims for work performed by sub-contractors can be entered by either a summary or detail method. They are assessed based on the terms and conditions of the original sub-contractor agreement.

Entries include claimed and assessed amounts, reasons for any differences, retention amounts, tax amounts and percentage of labour. Project Sub-contractor automatically calculates the default retention amount, along with the tax component of the assessed amount.

Once all amounts are accepted, a claim or invoice is raised showing the claim number, amount, currency rate, date and pay-by date.

Variations

During the life of a sub-contractor agreement, either you or the sub-contractor may request changes to the terms or scope of work. Project Sub-contractor allows multiple variations to be made to agreements detailed during the claim entry process.

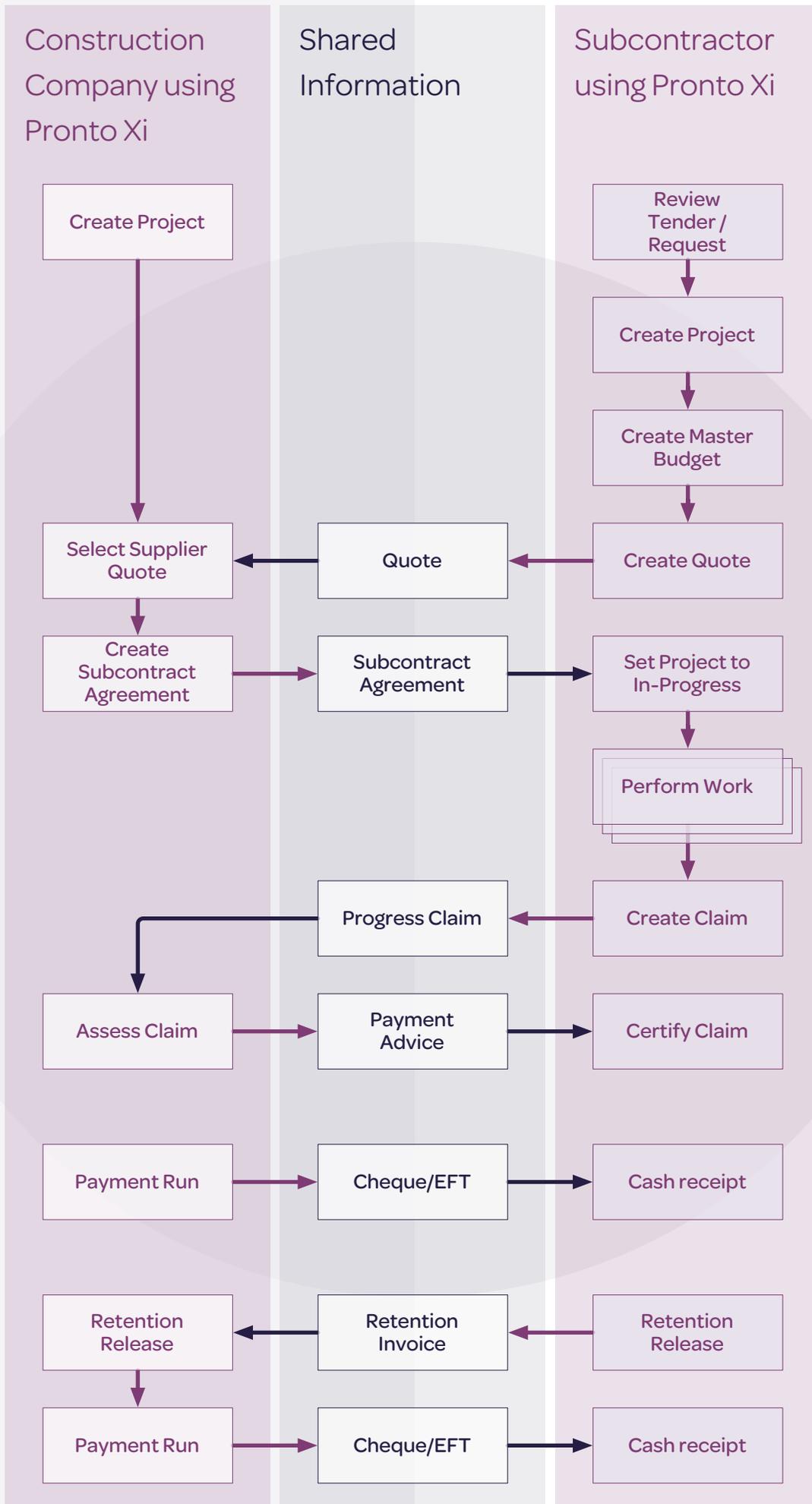
Sub-contractor retention release Held retentions can be released by the project manager at any point in the lifecycle of a sub-contractor agreement. Any retained funds are held in a separate general ledger account and when they are ready for release, Pronto Xi will automatically create a taxable payment for the supplier.

Enquiry on sub-contractor agreements

Given the number of sub-contracts and projects for which a single project manager may be responsible, it is important to have a powerful enquiry tool. With Project Sub-contractor, data can be filtered according to a wide range of criteria.

Agreements can also be filtered by type (such as lump sum, scheduled rates or supply), by status, by variation types or by claim types. These criteria are entered to select matching sub-contractors.

The enquiry tool also allows users to drill down into the detail of the record based on the criteria entered.



Sub-contractor claims workflow

Project manager limits, security and credit checking

Project manager limits

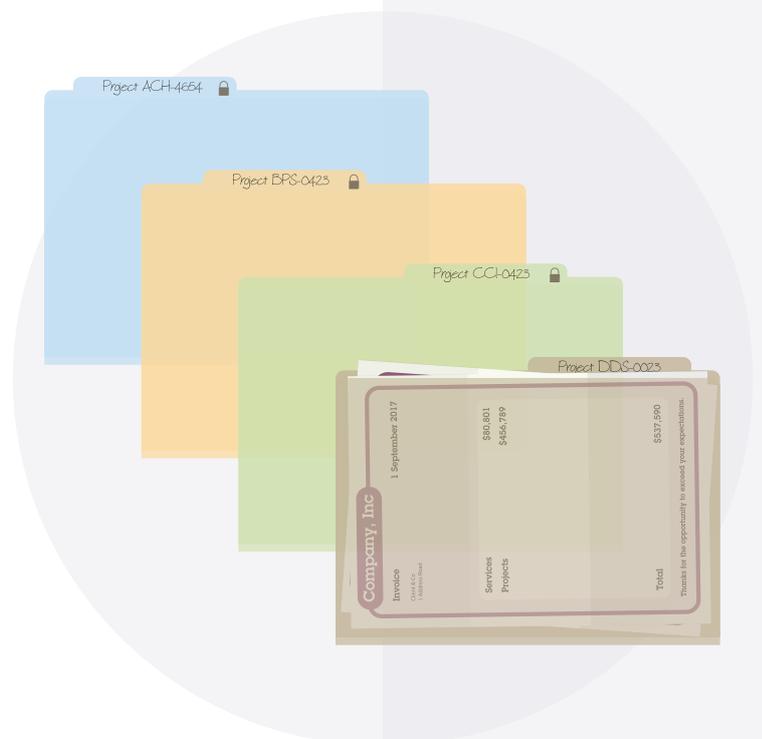
Project Manager Limits enable you to set the amount (in budget or contract value) that a manager controls at the different stages of an individual project. You can also set an in-progress limit but not a completion limit if desired.

Branch masking

Users can be restricted to projects based on branch masking rules so that branch data remains secure.

Checking credit limits

Project can notify users if a project budget takes a customer over their credit limit. Users have the option to receive a warning message but allow the project to continue, or leave the project at the quotation status until approval to proceed is received from a credit officer.



Time recording and timesheet entry

Project has a user-friendly time recording function that allows organisations to record, track and authorise timesheets for work performed in Project and Service. Timesheet entry allows the project manager to record and report labour costs, hours and overheads against a project or service call.

With the Timesheet Control table, you can customise timesheet entry for your business's needs. Some of the options include:

- Various methods of calculating cost rates
- Various methods of calculating charge-out rates
- Optional timesheet integration with Pronto Xi Payroll
- Choice of detail required for timesheet entry
- Posting of additional on-costs (eg. superannuation, personal/carer's leave)
- Timesheet approval

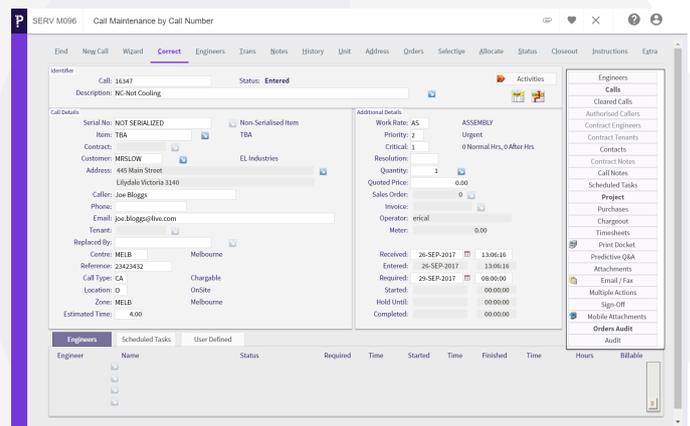
Timesheet entry can be secured at different levels, allowing specified users to run reports or even maintain and set up timesheet control records. You can also set rates for overhead recovery against labour costs, and these can be automatically posted.

Equipment cost and charge-out rates and timesheets

An equipment resource may be assigned default cost and charge-out rates for different periods eg. day or week. When entering timesheet transactions against the equipment resource, the default cost and charge-out rates are easily posted to the Project Task or Service Call.

Project to Service call creation

Project Managers can now create individual or bulk service calls at any stage of the project from within Project Management.



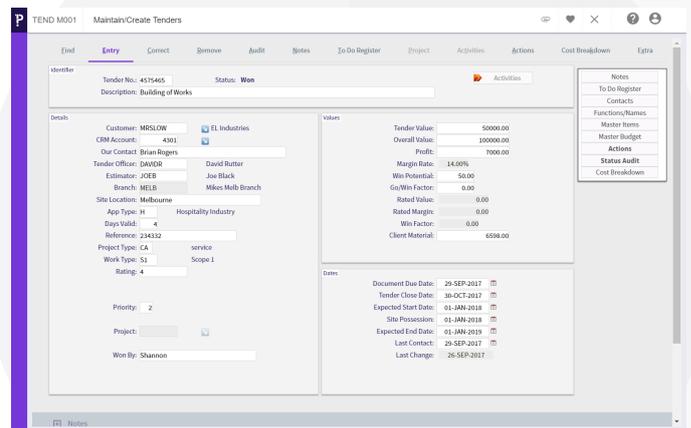
Pronto Xi Tender Management

Pronto Xi Tender Management manages future prospects, tenders and the associated contracts with these projects.

With Tender Management, project managers have the ability to forecast probable contract values and margins on these tenders, current jobs and service contracts.

Once the tender has been won, all data flows seamlessly into the linked project. The following functions are available in Tender Management:

- Go/Win factor
- Build a detailed Cost Breakdown Structure to capture tender-related costs
- History of changes to tender
- Notes associated with tender or prospect
- To Do Register itemises responsibilities and timeframes
- Forecasting and phasing of sales and margins
- Tender and prospect reports



Manage all tasks, actions and cost details via the Tender control screen

Dig Deeper.



Discover Diamonds.

Reveal insights to drive business
decisions with Pronto iQ

prontoiq.com.au

Pronto Xi Service

Direct and serve

Minimise your callers' waiting by simplifying contract management and keeping track of customer history, direct maintenance activities, warranties and service histories.

Create contracts, direct maintenance activities, analyse warranties and track service unit history with Pronto Xi Service. Accelerate call resolution and simplify contract management with sophisticated multilevel call monitoring delivered through a simple, informative interface.

Calls are summarised at a service centre level and separated into chronological order, letting you easily catalogue and access previous and current client inquiries. Gain insight into key performance metrics at a glance using Pronto Xi Business Dashboard – Service.

Integration

Pronto Xi Service is fully integrated with all Pronto Xi applications, removing unnecessary re-keying of data. It simplifies the management of service contracts and efficiently logs and processes service calls.

The Service to Project link provides integration with Pronto Xi Project. It directly links a service contract to a project to track costs and income, set budgets and measure contract profitability. It also provides service call profitability analysis.



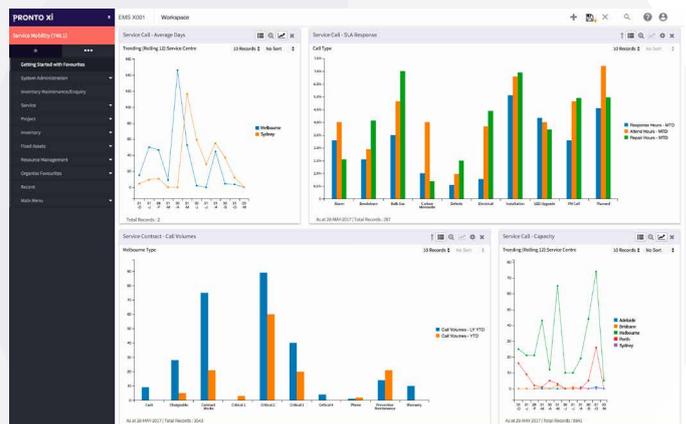
Intelligence

Pronto Xi Business Dashboard for Service provides an at-a-glance insight into service operation performance, allowing you to optimise productivity and maximise engineer utilisation.

Performance metrics include:

- Number of contracts due for renewal in the next 30 days
- Number of unallocated calls for the day
- Percentage of calls for the day which are unallocated
- Number of outstanding calls
- Current call counts by active status
- Number of overdue unallocated calls by call service centre

An extended library of Business Intelligence metrics is also available for deeper analysis purposes. Pronto Xi Analytics allows effortless analysis and intuitive investigation with easy-to-use drill-up and drill-down data exploration. Pronto Xi Analytics Dashboards provide an extended library of prebuilt report and performance metrics to help further drive improved performance of your Service operations.



Contracts

You can set up service contracts for serialised and non-serialised items, recurring billing values, warranty obligations, preventive maintenance schedules and other user-definable contract types. The contract details define the service units covered as well as the duration and terms of the contract.

To improve the customer service experience, templates can be used to expedite the Service Contract and Project creation processes. Auto-population of standard parameters also helps you maintain data protocols across your contracts.

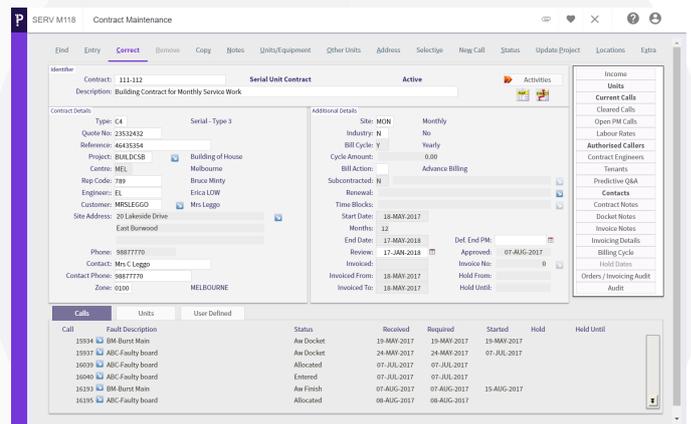
For users of Pronto Xi Sales and Inventory, service units covered may be items that have previously been sold to that customer, either directly or through a distributor. Equipment sold by another supplier is also catered for, with a description and serial number recorded separately from your normal inventory.

Time-based service recording

You can use time-based service recording for your labour and/or travel coverage of contracts. This allows you to sell prepaid service coverage, with three billing cycles available:

- Time-based at the contract level
- Time-based at the unit level
- Time-based at the contract level with voucher numbers recorded

After the selection of the billing cycle, the number of time blocks sold, the duration of each time block and the charge per block are entered. Time-based unit level contracts require the time details only for serialised items.



Contract invoicing

Bulk contract invoicing routines in Service streamline the invoicing process. They calculate and recognise both earned and unearned Contract revenue to provide greater visibility of projected income values.

The invoice value of a contract is the sum of the service rate of the units attached to that contract by one of many billing cycles available. Customer facing invoices can be tailored for both contract and calls, with flexible crediting features to cater for partial or full invoice credit arrangements.

Billing cycle

There is complete flexibility in how you set the billing cycle for a contract. When an invoice is raised, Service calculates the amount due for each unit by multiplying the number of billing cycles invoiced by each unit's service rate. The 'invoiced-up-to' date is then incremented by the billing cycle period.

An 'invoiced-up-to' date is held for each unit on the contract, as well as on the contract itself. This means that you can add or remove units from the contract, and the next invoice is adjusted on a pro-rata basis.

Advanced billing or unearned income

When invoices are raised for service contracts, it is likely that they will cover services that may be required in the future. Pronto Xi General Ledger considers monies received for such invoices as 'unearned income' and records it as a liability until such time as the revenue is earned.

Renewals

To help you get existing contracts renewed once they are close to their expiry date, you can send out up to three renewal notices to customers at specified intervals before the expiry date. If a renewal is accepted, a renewal invoice is automatically created.

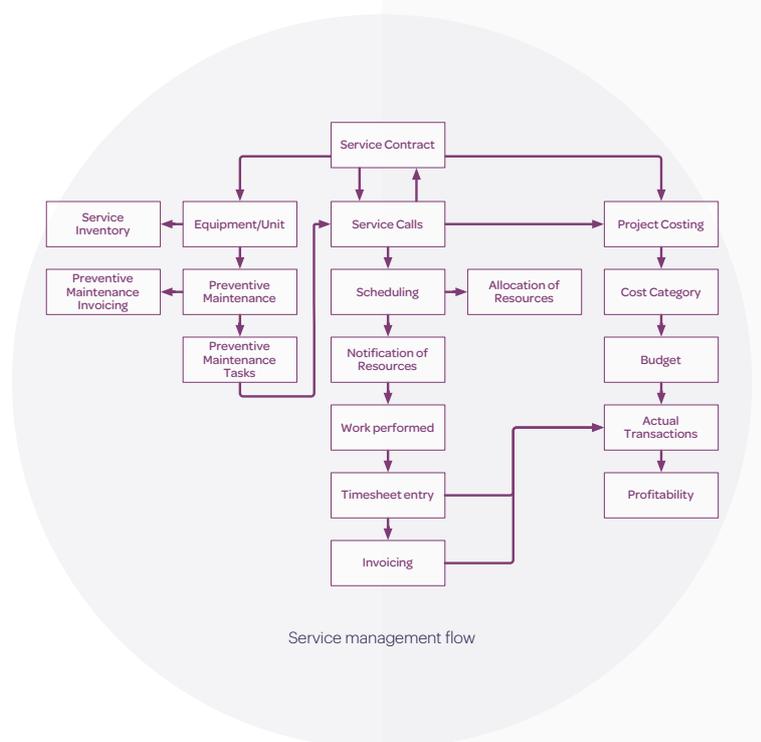
Contract on-hold and billing on-hold

You can choose to put a contract on hold without closing it. This may occur because:

- The contract is no longer active, but final sign-off is not complete
- The contract may not require billing for a defined period
- There is a dispute

Preferred and blacklisted service engineers

Any contract site can hold a table of preferred engineers. Your clients can build affinity and trust with familiar engineers, leading to increased customer satisfaction. Conversely, you can blacklist technicians in the preferred engineer table to block them from specific customer contracts.



Service management flow

Service calls

Service includes a call processing component to help you control the day-to-day activities of your service department.

Call logging

Calls can be logged using either the Wizard Call Logging screen or the Form Entry Logging screen, extending to other integrated modules such as Service Connect, CRM or Sales.

Because each screen of the Wizard prompts the user to select the correct information, it is very useful for casual users or to train new users. The Form Entry option is better suited to more experienced users, allowing them to log calls effectively in a minimum amount of time.

To ease any administrative burden of service call creation for repeated works, a 'Copy Service Call' function allows for a call to be created from a previous call logged.

Logged service calls fall into three main types:

- Internal calls, where the unit to be serviced will be brought to your workshop
- On-site calls, where your engineers must go on site
- Telephone support

Calls are logged using a simple, flexible process that is fast enough to be used by a telephone operator. As the call is logged, a credit check is performed and the status of the account is verified in Pronto Xi Accounts Receivable.

Quickly log your customers' calls while they wait

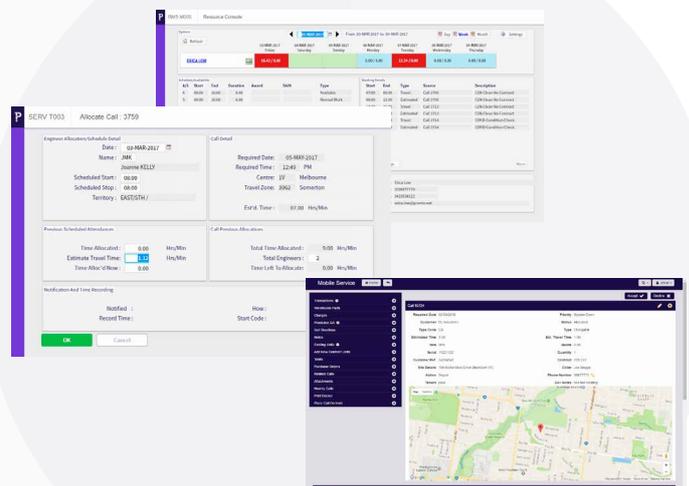
Estimated travel time is a notional representation of travel time to site, based on the Time Zone table. Both Resource Management schedule view and Service Scheduler will display the travel time and then the working time. Google Maps™ licence is available separately.

At the time the call is assigned, any service history is immediately on hand to help the operator decide which engineer to allocate to the job.

You can also check whether the contract is active and the caller is authorised to place the call, although you don't need to have an active service contract to be able to log a call.

Service will identify whether or not the subject of the call is under warranty. Once the call is logged, a docket showing the address and details of the job can be printed for the engineer's reference. Various pre-printed formats are supported.

When a call is entered, a quotation can be entered with it, which places the job on hold pending its acceptance. Calls can be printed to a call log to create a permanent record of when they were taken.



Include estimated travel time in your engineers' schedules

Call resources

Once a call is logged, it can be allocated to an engineer or to several. You can have the system set up to do this as the call is entered, or choose to have an engineer recommended based on contractual preference, skill, territory and/or availability.

Service can automatically notify an engineer of a call allocation via SMS or email.

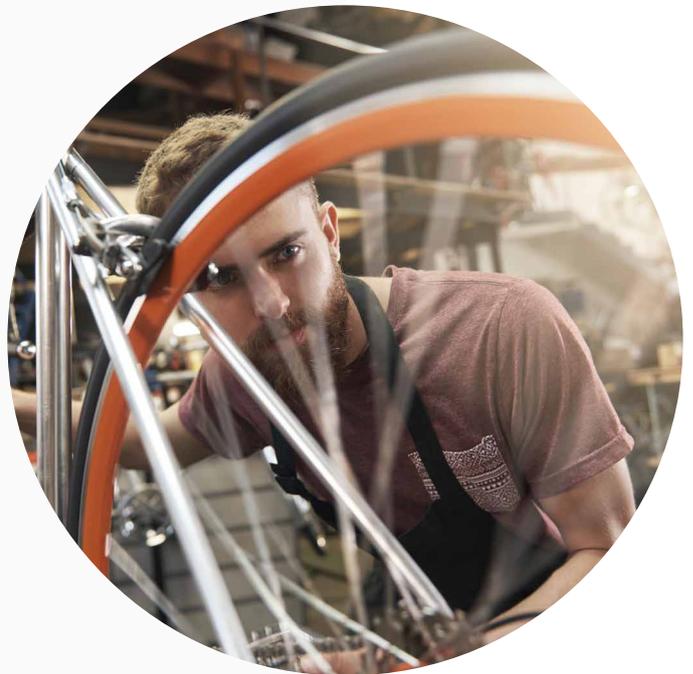
The status of a particular call or calls can be checked at any time. Calls can be grouped by engineer, making it easy to see if someone is behind schedule so their calls can be reassigned to another engineer.

Pronto Xi records 'real-time' work on each call as well as billable time. Once complete, you can enter full details from the docket, including the fault, which can be assigned a code so you can analyse calls by fault type.

Cancelled calls and finished calls are retained on file and can be reactivated into live calls at any time, even if they have been archived.

When a call is complete, an invoice is generated that includes amounts for labour, travel, a call fee, parts used and metered charges. A replacement unit or component of the unit can also be recorded at this point, and the customer's contract amended accordingly.

Tailored minimum time blocks can also be charged within the billing cycle of a Service Contract to pre-bill blocks of time, to be consumed at the call level as engineers post timesheets.



Van inventory

For ease of tracking inventory, Service recognises an engineer's van as a 'location' attached to the warehouse from which the inventory has been taken. Inventory levels can be checked and regulated as required, and replenishment ordering can ensure that necessary inventory levels are maintained.

Engineers' vans can also be set up as individual warehouses so that stocktakes can be done for one unit or a group.

Critical calls

Multilevel call monitoring is available to measure performance against call response and contractual obligations. Service will escalate the call and notify the service team when performance responses have been breached.

Service centre

Service calls are usually logged in a service centre, which may be a workshop where the service work is actually carried out or a centralised base from which service calls are monitored and distributed to engineers who travel to sites to perform the work.

If you have a centralised service centre taking calls from various regions, the regions can be identified at the time the call is logged. For a region in a different time zone, the call is automatically logged in the time zone of the customer making the call.

Carryover notes

Carryover notes highlight additional information particular to each service call that is relevant to the service user. For example, the service call centre can input temporary key collection points or safety requirements to ensure the engineer is aware before attending the site.

Predictive Q&A hierarchy

With the Predictive Q&A feature of Service, you can be proactive in gathering consistent information about each piece of service equipment.

A subset of Predictive Q&A questions can be triggered based on the response to a previous question. This multi-layered approach improves the ability of technicians to perform on-site diagnostics.

Predictive Q&A can also be used as a triage tool for Service Centre personnel at the call logging stage or used to predict trends in items with high failure rates.

For service customers, Predictive Q&A has the added benefit of providing valuable feedback on an item's condition or performance for condition monitoring and asset condition reporting requirements.

Preventive maintenance

With in-built flexibility, preventive maintenance (PM) calls can be generated in two ways:

- Detailed Preventive Maintenance service calls are generated in accordance with the equipment routine frequency
- Preventive Maintenance calls are generated in a Run format within a routine hierarchy sequence

Hierarchical run-based PM calls are managed by consolidating serviceable equipment within a single PM service call for each run. Service technicians can then perform each routine for the service run, all within the Mobile Service web app. If monthly and weekly tasks are due at the same time, the incremental weekly tasks for the month are automatically generated.



Location by site equipment

Pronto Xi Equipment Site Location lets you record the location of any item or piece of equipment belonging to a service contract, making it easier for engineers visiting the site to locate a piece of equipment.

Office staff can use location data to examine the history of work at a location or specific piece of equipment.

Location codes can refer to a hierarchy of attributes and attribute sets, providing additional information about an item's location, a useful option for large or complex sites.

Locations are managed against a contract as freeform text. They can then be attached to equipment/units.

Service distribution integration

Because Service is fully integrated with Pronto Xi Distribution, inventory allocations to service calls can range from informal material issue through to formal picking slips creation.

Service is also linked with the Pronto Xi purchasing functionality. Purchase Orders can be created and the entire procurement lifecycle managed against each service call. Calls can be placed to 'Parts Required' status to keep service technicians and their customers informed throughout the call and purchasing process.

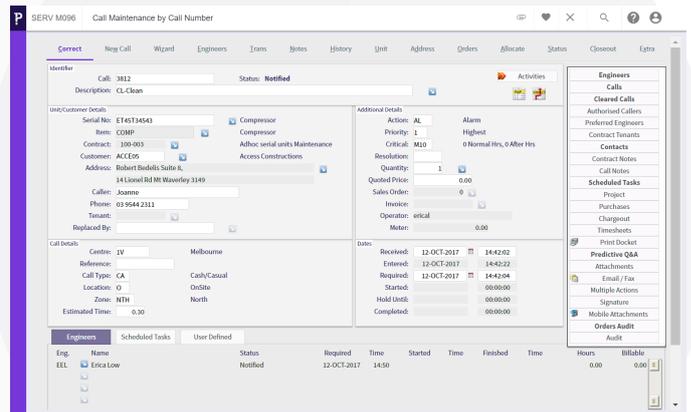
Service call maintenance desktop

Combining all major service functions in one central area, the Service Call Maintenance Desktop gives operators a complete view of their service operations in a single screen, allowing for fast and efficient processing.

With drill-down capabilities at the click of a button, operators also have access to detailed information and functionality without leaving the Desktop.

Selective contract and call enquiry

By specifying parameters such as service centre, outstanding service calls or engineers, the Pronto Xi Selective Contract and Call Enquiry function makes it easy to search for service information. The search results are displayed in a data grid, which allows for flexible reporting methods.



Engineers

Each of your engineers is linked to a specific service centre and service calls allocated accordingly. If required, calls can also be allocated to engineers from other service centres.

The activity of each engineer can be displayed in Pronto Xi Service Scheduler so that his or her call schedule can be developed and monitored. Pronto Xi Payroll can also store the employee number of each engineer, allowing you to record additional payroll information.

Service visually displays incoming service calls and engineer workloads, and integration with Pronto Xi Service Scheduler allows calls to be allocated to engineers using the drag and drop method.

Linking engineers to Resource Management

Resource Management is an optional module, which can be activated by Service Centre.

When Resource Management is activated, it supersedes the standard service call allocation by allowing users to see all resources in the schedule view and filter by attributes (which can be defined by the engineers skill set and skill group) and understand who is available when.

The Resource Master Screen can define the resource type, status, award, location, and calendar – the essential elements and characteristics of each resource that feed into Service allocation considerations.

Linking equipment to engineers in Resource Management

Within Resource Management there is a resource type called equipment, either serialised inventory or assets. Equipment can be linked to an engineer or can be standalone.

Giving further flexibility to have a visual of what engineers are linked to what equipment and/or knowing when certain equipment is booked out on a particular service call.

Maps

Using web-based map technology, Pronto Xi allows users to quickly and easily obtain a map or driving directions by clicking the relevant map link on the screen to locate his or her next service call.

Pronto Xi Service Scheduler

Good call

Make the most of your service calls with a user-friendly interface that minimises training requirements.

Pronto Xi Service Scheduler optimises dispatcher efficiency with current call status and easy engineer allocation, dramatically increasing the operational efficiency of a service centre. An up-to-the-minute overview of caller traffic and an easy-to-use drag and drop interface facilitates the allocation of calls to available resources.

Key functionalities include:

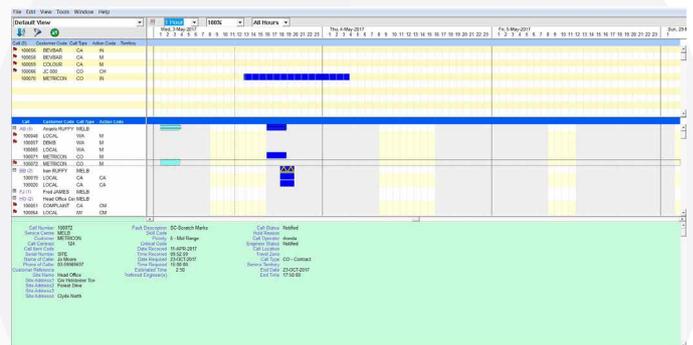
- Real-time data displayed in graphical format
- Unallocated service calls showing expected duration and completion dates
- Allocated resource display
- Full description of selected calls
- Multilevel resource calendar

Complete visibility of unallocated calls and engineer activity

Service Scheduler facilitates decision-making by displaying all the information required for field resource allocation to service calls on one screen. If more detail is needed, full integration with Pronto Xi Service means it is only a click away.

Easy drag and drop allocation of calls to engineers

With its user-friendly design, dispatchers will find it quick and easy to allocate calls. Calls can be viewed by skill requirement and matched to engineers with the appropriate skill-set.



View service call time blocks and allocate engineers using drag and drop features

Completely customisable

Service Scheduler caters for a wide range of work practices and procedures.

Advanced 'sort and filter' options allow you to focus on critical calls. Unallocated calls can be filtered and sorted by service centre, call type, call number, priority, required skills, action type, region and customer; while engineers can be filtered by service centre, engineer number and skill code.

Multiple dispatchers can allocate calls simultaneously if required, or dispatcher access can be limited to specific service centres and call types.

How Service Scheduler works

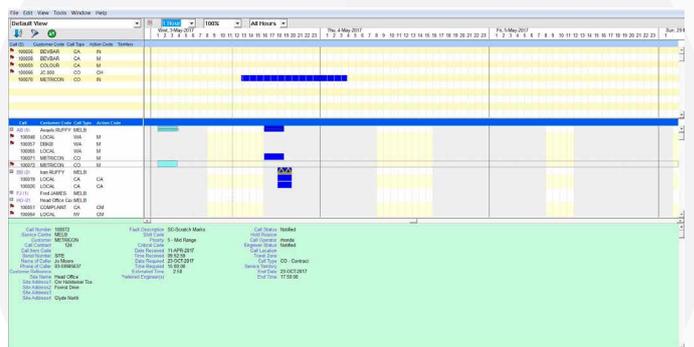
Call and engineer information is automatically extracted from Pronto Xi and displayed in Service Scheduler according to your preferences. As soon as a call is allocated to an engineer, the information is updated. Warnings appear if two or more calls are allocated to an engineer at the same time.

Service Scheduler is fully integrated with Pronto Xi Service, giving you real-time connectivity for greater efficiency.

Directions and maps

With the Map feature, you can drill down directly into Service Scheduler to find directions to a final destination. By default, the Map option will pass the service call address to the Maps URL using, in order of preference:

- Call address
- Contract address
- Customer delivery address
- Customer address



Pronto Xi Mobile Service

Keep the wheels turning

Deliver the information your technicians or field engineers need anytime, anywhere.

Using web-based technology, Mobile Service links directly with Pronto Xi Service to efficiently log, process and track all service activities. It's also flexible enough to manage all reactive and/or predictive service calls while ensuring you meet and exceed your customer service level agreements.

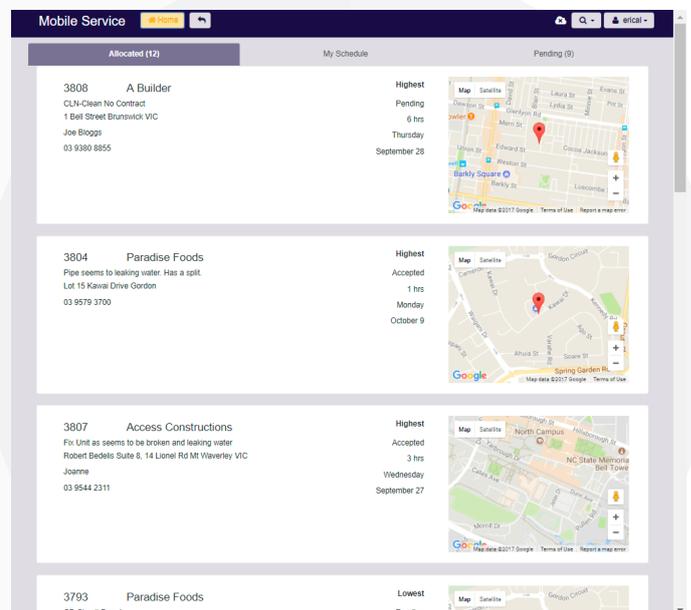
Fast in the field, fast in the office

Your field workforce stays connected and informed. And your managers have access to real-time information at their fingertips, whether at the back office creating and dispatching calls or measuring performance and overall productivity.

To ensure the fastest possible call-to-cash process and, in turn, a significant reduction in Days Sales Outstanding (DSO), Pronto Xi Mobile Service provides service technicians with the functionality needed to carry out all predictive and reactive works and, at the call conclusion, invoice the customer and collect payment via a secure payment gateway.

Automated back end processes such as updating timesheets and purchase order commitments ensure that all data captured throughout the service routine is represented within summary screens of the Mobile Service UI and the resulting customer invoice. Technicians can also choose to email the invoice in the absence of a physical printer in the van.

Pronto Xi Mobile Service has been designed to suit complex B2B and B2C Service delivery environments where multiple technicians can undertake work on the same call, or where maintenance schedules for multiple items of equipment can be managed efficiently and effectively by a single technician. Google Maps™ licence is available separately.



Call details are instantly updated from field to office or office to field

The screenshot shows the 'Mobile Service' app interface. At the top, it displays 'Service Details' with fields for 'Customer Name: John Ledger' and 'Service Call No: 10351'. Below this is a 'Notes' section. The main part of the screen is a table with the following data:

Description	Quantity	Discount	Price	Amount
Travel	1.0000 HR	0.00	55.00	55.00
Service charge	1.0000	0.00	38.00	38.00
Labour	1.0000	0.00	1,338.40	1,338.24
Parking \$20.00	1.0000 EACH	0.00	1.00	1.10
			Total Ex	1,624.40
			GST	162.44
			Total	1,786.84
			Paid Amount	0.00
			Balance Due	1,786.84

At the bottom of the table, there are four buttons: 'Email', 'Print', 'Payment', and 'Payment Not Taken'.

User defined payment methods can be tailored where necessary

Streamlined data capture

Because information can be updated on the go, Mobile Service helps field users manage their day-to-day workload, particularly when there are unplanned events. Easily capture van parts used, complete timesheets, raise purchase orders and add photos. Mobile Service also delivers improved cash flow as customer signatures are captured on site, reducing the time between doing the job and charging for it.

On the road or in the basement

If a field engineer goes offline for some reason, Mobile Service will store all necessary data within the browser cache of their mobile device and upload it as soon as there is a connection.

See what to do, show what you've done

Pronto Xi Mobile Service delivers a level of technical document management that is unsurpassed by any other offering in the market today. Link diagrams and specifications to your jobs, make comments and sketch annotations. You can save notes to collaborate with your teams. Take photos, attach them to your job and annotate them.

Engineers can also plan their days or weeks as Mobile Service provides a 'My Schedule' view of all allocated service calls and their required start times, ensuring better workforce utilisation and better forward planning.

Safety Questions for 3804

Have a clear understanding of the scope of work

Have a current COES permit

Read and understood procedures (JSEA/SWMS)

Safety first

Pronto Xi Mobile Service asks engineers before they start work to verify OH&S compliance and safety procedures, including height, temperature, lighting, traffic buffers, electrical safety and more. Due to its adaptability, Mobile Service can ask the questions relevant to your business and your people so that you have more control over workplace health and safety practices.

Mobile Service invoice process attributes

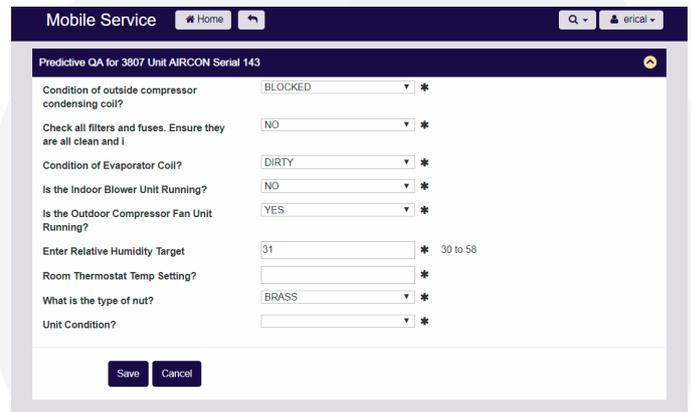
To cater for flexibility in relation to on-site customer billing arrangements, the 'Process Attributes' feature allows contract managers to activate or deactivate invoicing and payment receipting features at a customer, contract, service type or service centre level.

Smart and easy

If you've ever introduced new procedures and forms to your mobile workforce, then you know that compliance and adoption are hard. Because Mobile Service makes daily routines easier, it can be adopted very quickly.

Predictive Q&A

Any serviceable item can be set up with Predictive Q&A Hierarchy to enhance on-site decision making and provide a method of capturing condition monitoring data, an essential element in understanding equipment life-spans and avoiding major failures. Mobile Service will step your field engineers through the questions that need answers – whether it's required by your customers, or just sensible maintenance.



The screenshot shows a mobile application interface titled "Mobile Service" with a navigation bar containing "Home" and a search icon. The main content area is titled "Predictive QA for 3807 Unit AIRCON Serial 143". It contains a list of diagnostic questions with corresponding input fields:

- Condition of outside compressor condensing coil? (Dropdown menu: BLOCKED)
- Check all filters and fuses. Ensure they are all clean and i (Dropdown menu: NO)
- Condition of Evaporator Coil? (Dropdown menu: DIRTY)
- Is the Indoor Blower Unit Running? (Dropdown menu: NO)
- Is the Outdoor Compressor Fan Unit Running? (Dropdown menu: YES)
- Enter Relative Humidity Target (Text input: 31, range: 30 to 58)
- Room Thermostat Temp Setting? (Text input: empty)
- What is the type of nut? (Dropdown menu: BRASS)
- Unit Condition? (Dropdown menu: empty)

At the bottom of the form are "Save" and "Cancel" buttons.

Predictive Q&A features help technicians with faster call resolution whilst helping them gather critical equipment data

Serial Attributes for Unit GG4.1 Serial 24234

Supplier Name: Bunnings

Manufacture Name: NZ Company

Size of Unit?: Large

Inspection on Install Complete: 01/01/2018

Compliance Number?: AD23432GER

Detail of Unit?:

Save Cancel

Serial attributes

To deliver a greater level of compliance, identification and reporting capability, unique attributes can be set against serialised stock and/or serviceable units.

Define standard equipment attributes that are relevant to equipment using templates. Copy these attribute templates from one equipment profile to another to facilitate the set-up and management of customer-owned equipment held under a service contract.

Adding new serials on the go

Service engineers can now add new serviceable items as they identify them during their service run. They can also include relevant details, such as make, model, serial number, installation and warranty dates. Once captured, the service contract pending units table stores the identifying details, waiting for approval before being allocating to a contract.

With this new easy-to-use mobile interface, engineers can identify and capture all related equipment at the start of a new maintenance contract or capture previously missed units from an existing contract during a site audit.

Add New Contract Unit for 3807

Item: 440S - 440S System

Make Code: Daiken

Location Code: Building 10

Serial Flag: Serialised Unit

Serial Number: 3454353AGE

Quantity: 1

Installed Date: 27/09/2017

Warranty Date: 27/09/2017

Contract Notes: New unit install on site. Need to maintain this unit at each site visit.

General Notes: This unit is slightly different and requires change of filter

Next Service Notes: Clean out filter

Est Labour Hrs: 1

PM Routine Code: ---Please Select---

Work Performed Date: 27/09/2017

Time Duration: 1

Save Cancel

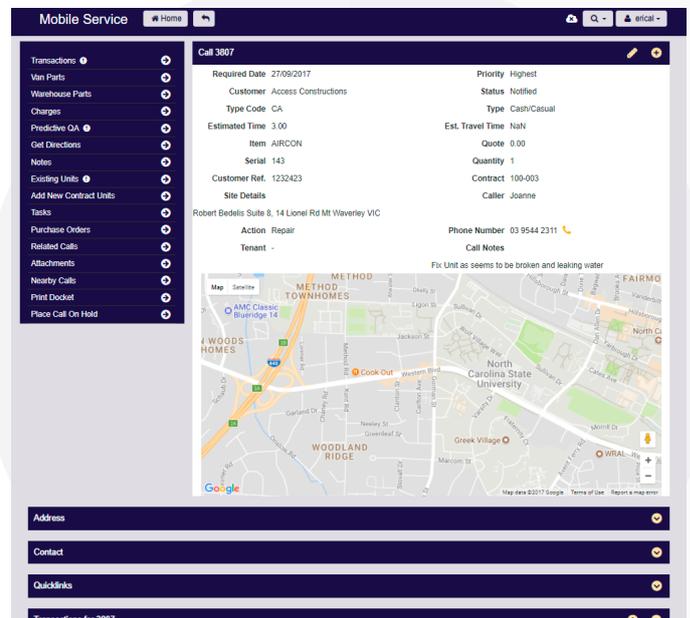
Service in, service out

Mobile Service delivers a complete feature set ranging from call management through to invoicing and payment receipt, making it the ideal field service solution for the commercial and consumer service market.

Superior customer service delivery hinges on your ability to respond to critical issues within agreed timeframes. So we've designed critical call escalation routines that manage high priority calls. This feature constantly monitors calls and escalates them to ensure they're responded to, attended to and repaired within the customer's Service Level Agreement.

Pronto Xi Mobile Service with Pronto Xi Service provide the powerful and feature-rich service delivery platform that simplifies complex service routines, allowing you more time to effectively manage exceptions in your business, and reveal richer business insights. As well as providing greater efficiency, it could give your business a tangible competitive edge.

Mobile Service works with all modern mobile devices, however an Android-based tablet running an HTML5-capable browser is preferred. Google Maps™ licence is available separately.



Mobile Service delivers all the features needed to conduct most service activities, anywhere

Pronto Xi Service Connect

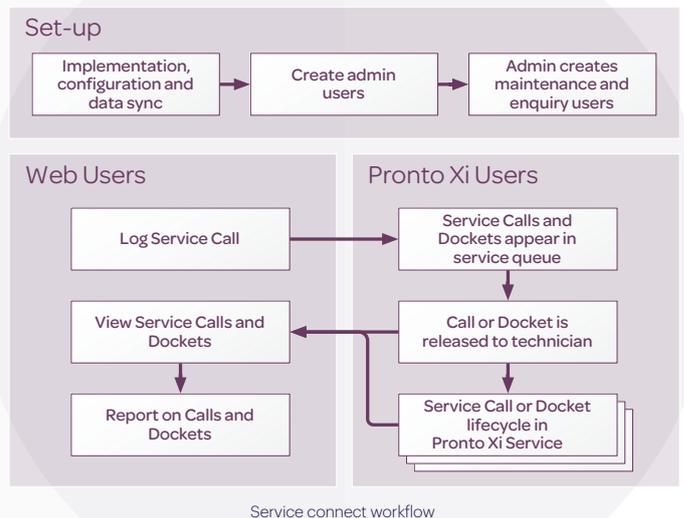
Stay on track

Share service call information with your customers through an easy-to-use online web portal, freeing up your service centre resources.

An extension of Pronto Xi Service, Service Connect is specifically designed for the service industry. Empower your customers by giving them access to up-to-date service call information – including their own prior history – allowing them to deal with concerns at their leisure.

Key features of Service Connect include:

- Offline capability if the server is unavailable
- Easy deployment to customers
- An intuitive web interface with minimal training requirements
- Secure access through password protection
- A web-based portal accessible from leading browsers
- Seamless synchronisation of key data



Manageable customer access

With the Service Connect Call Logging Screen, you can specify the fields a customer fills out and their defaults. All service calls logged via the web portal are fully audited. Back-office staff can track who logs which calls.

Security levels for each customer can be defined, with three levels of access:

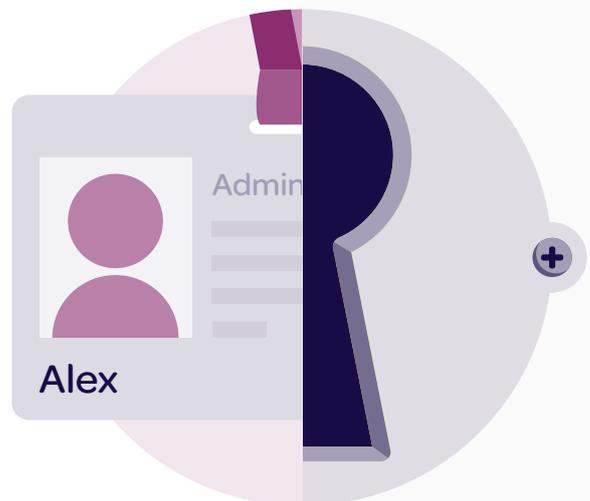
- **Customer system administration** – A system administrator can set up users within a customer company, and each user's access (eg. enquiry or maintenance access)
- **Enquiry access, view-only level** – Users are only able to view service calls and history based on service contracts, units and equipment, etc.
- **Maintenance access** – Users can log new service calls and review information provided on the web portal as per enquiry access

Improved customer service

Improve both service team efficiency and customer service with Service Connect:

- Service calls can be reviewed at any time
- Less call centre administration is needed to support incoming calls
- A powerful search capability is built-in

An open content web framework allows you to use standard or custom pages and layouts to suit your business requirements. This provides easy deployment, scalability and architectural flexibility.



Pronto Xi Maintenance Management

Mind your overheads

Reduce breakdowns and service costs by making sure your equipment is in top shape, and that the right parts and manpower are handy whenever something goes wrong.

Maximise planning and control of your plant maintenance activities with Pronto Xi Maintenance. Effortlessly monitor your preventive and predictive maintenance, plant downtime, failure rate against targets, expected life, fault repairs, and equipment and repair costs within a single, comprehensive module.

Maintenance automatically collates vital data from across your facilities, giving you full control of how you view your outcomes. Spot failures and identify maintenance improvement opportunities swiftly with fault analysis reporting, and keep an eye on repair ramifications with full work order integration.

Some of the key features of Maintenance are:

- Full equipment profile of components and Parent Item
- Priority work order allocation
- Condition monitoring
- Automatic inventory allocation
- Work order forecasting
- Work request process
- Configurable monitor points
- Defect work order recording
- Integration to Microsoft Project
- Stock purchasing
- Customer invoicing for completed work

Equipment register

Maintenance contains an equipment register where detailed information about the equipment is recorded. Items can be classed as:

- **Asset** – relates to a fixed asset
- **Component** – an inventory item
- **Level** – used in costing/enquiry mode, relating plant items to each other

You can identify each item by its own unique number as well as an identifier related to a fixed asset or an item serial number. This allows you to quickly identify items and allocate maintenance details to the correct item. The identifier may reflect an existing equipment numbering system already in use.

Equipment can be grouped by cost centre, type and location, and categorised by equipment, assemblies and sub-assemblies.

Manufacturer details are recorded as well as other details such as the supplier, warranty date, installed costs, installation date and other associated costs. Budgets and actual costs incurred are held by plant item per period per year for labour, materials and usage.

The Plant Tree view allows easy access to the plant item records and gives a highly visible overview of plant items and their components.



Preventive and predictive maintenance

Plant managers can implement a maintenance strategy for a plant in the form of preventive and predictive maintenance tasks. The maintenance strategy can be developed and implemented based on run time, condition, statutory inspection requirements or scheduled shutdowns.

Flexible PM Tasks enable plant managers to tailor specific schedule service intervals and frequencies, and because PM Tasks has a one-to-many relationship with Plant Items, any changes to tasks automatically flow through to all attached serviceable items.

Maintenance enables plant managers to compare 'scheduled' versus 'actual' for both activity and costs. Full-cost history reporting is available to assist decision-making in regards to replacing or maintaining equipment.

Work Order fault reason code

You can record fault reason codes against Work Orders before the completion of work. Maintenance Management users can analyse and track work orders by fault reason code during the lifecycle of the work order.

Return Pick to alternate warehouse

When managing picking slips for Work Orders, you may need to return allocated materials to an alternate repair warehouse. If this is the case, the warehouse code on the picking slip header can be changed to an alternate warehouse when raising the return picking slip.

Component change out

A rotatable repair is where a new or previously repaired item or component replaces a failed item, which in turn is repaired and kept for another exchange

There are effectively two processes:

1. The repair of the plant item, where the rotatable item is one of the components of the repair (the repair could include multiple items of which the rotatable item is just one of many)
2. The repair of the rotatable item itself

An item of plant and equipment may consist of several large components, for example, a truck will have an engine, drive train, suspension, pumps, etc. The pressure to keep a truck on the road and productive requires that its maintenance is completed quickly. It is often more efficient to replace a large or complex component than repair the component.

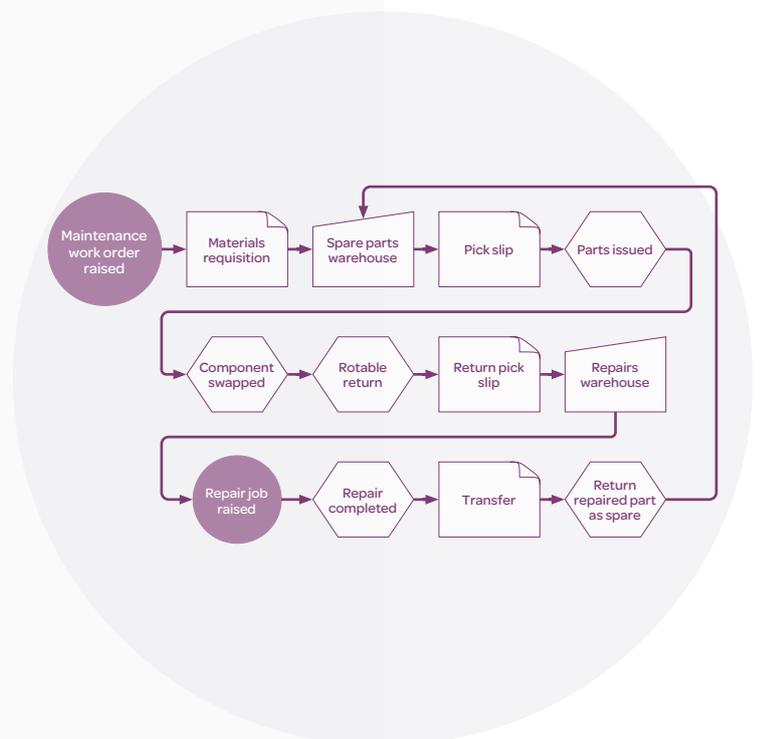
The plant item is quickly back to being productive and the component can be repaired over a more manageable timeframe, or sent out to a 3rd party for repair.

Components removed from a plant item during maintenance are not always scrapped or discarded. An item such as a truck engine can be reconditioned and re-used. Many reconditioned components have a limited overall life, cannot be reused indefinitely, and will eventually be scrapped.

Ability to track the components

Working with existing inventory management and project management modules, you can track the components being repaired, scrapped or reworked, whether in house or via an external service provider.

This is all controlled via a picking slip workflow.



Work order management

A wide range of reports and enquiries is available to allow users to prioritise and plan work orders using information such as plant item relationships.

The work order cycle can be managed from plan to completion. Several enquiry/report options exist to search for work orders based on the components of the work order itself, from related plant items or via text string pattern searches.

You can use work order forecasting to produce the maintenance schedule, confirm manpower requirements, and provide KPIs that summarise and show trends of scheduled loading and completion. Work orders can be set up to allow printing of any specialised documentation, licences and plans.

The screenshot displays the 'Maintain Plant Item' window for item 50002. The interface is divided into several sections:

- Header:** Plant Item: 50002, Description: Crane Gotwald 50T on
- Details:** Plant Type: Asset, Location: MELBOURNE DEPOT, Serial Number: 50002, Model Number: 9T8324234, Supplier: LOCAL, Manufacturer: NISSAN, Installation Date: 01-JUN-2010, Warranty Date: 01-JUN-2015, P/O No: 98757, Capital Cost: 250000.00.
- Work Orders:** A sidebar menu with options like Work Requests, Cost History, Safety Notes, Drawing Notes, Monitor Points, PM Tasks, Spares List, Defects, Changeouts, MPM History, and Component Condition.
- Usage/Tracked:** Usage UOM: hr, Production UOM: hr, Weekly Average: 45.
- Component Tracked:** Track Serials, Expected Life: 45000.00, Warranty Life: 8000.00, Changeout PM Task: 0, Condition, Changeout Cost: 0.00.
- Failure Details:** Target MTBF: 5000, Actual MTBF: 13258, Last Fail Date: 08-JUN-2012, Days Since Fail: 1232, Total Failures: 1.
- Costs/Income:** Item Code, BOM ID, Parent Project, Work Centre: PACK1, Total Labour: 3120.60, Total Material: 3718.69, Total Other: 9.00, Total: 6847.69.

See the activity history of all plant items on a single screen

Maintenance work order planning

Enter maintenance requirements directly into Maintenance as a work request and then reject, approve or set to a status of defect upon review. Defects can then be addressed; corrections and maintenance tasks planned and scheduled.

An estimate of hours, equipment and parts required for the task can also be generated. This information may be predefined on a preventive maintenance task and used as a template for the work order.

To allow for the capture of meter readings, comments and actual downtime or duration, the status of a work order changes progressively until completion.

Maintenance work order forecasting

Using work order forecasting, Maintenance can generate preventive maintenance work orders when they fall due. Planned maintenance can be entered into the system, transferred from a work request, or converted from a work order forecast.

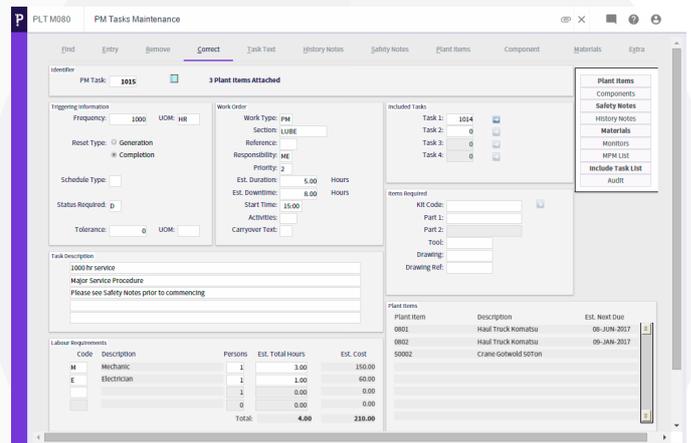
Once a work order has been generated via the forecasting process and issued to the person responsible for maintenance, the plant work order is now in progress.

Work order priorities

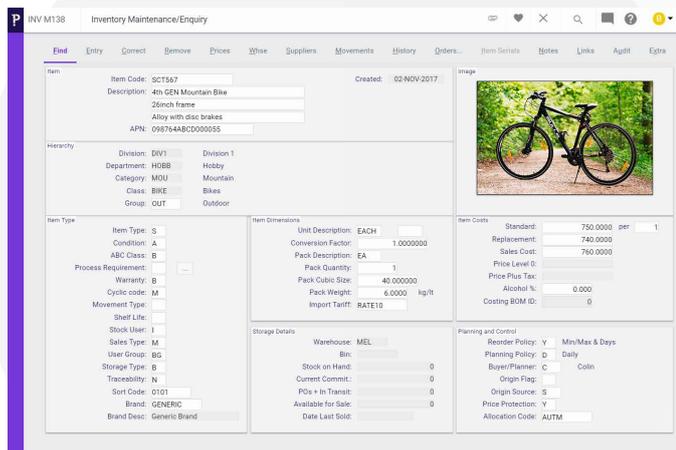
Maintenance supports work order classification and escalation by priority. The use of priority codes enables key work to be planned, resulting in scheduling and execution of the work in a timely and efficient manner.

Resource planning

A predicted workload for each labour type can be compared against the available working hours to help identify potential work overload.



Plan complex maintenance routines with ease to extend the life of your assets



Inventory management

Manage your spare parts availability with Inventory Management. Inventory control, warehousing and purchasing are provided when linked to other modules of Pronto Xi. Serial number tracking of component issues allows easy identification of component items within a plant asset.

Warehouse, Inventory and Purchasing

When coupled with Pronto Xi Inventory and Purchasing, Maintenance provides maximised warehouse throughput and customer service by intelligently controlling movements of replacement parts into, around and out of the warehouse.

Maintenance keeps track of both repairable and rotatable inventory items, which includes the procurement of necessary parts and services. Pronto Xi Inventory contains a wide range of reports and on-screen enquiries into inventory levels, prices, sales orders, purchase orders and historical sales.

With Pronto Xi Purchasing, a number of functions are included to help you plan future inventory requirements. By combining data on inventory levels, sales history and current commitments, purchase orders can be automatically generated based on a number of flexible criteria.

Intelligence

Perform effortless and deeper analysis into key aspects of Maintenance using Pronto Xi Analytics Dimensions for Maintenance. A prebuilt hierarchical data format is available to allow intuitive analysis of Plant Items, Works Orders and Work Order Transactions using easy drill-up and drill-down navigation.

Pronto Xi Rental

Hire power

Trace contracts for your rental products with our fully integrated, flexible system – so you don't have to chase after them later.

Pronto Xi Rental works from the agreement between you and your customer, so the rental contract defines the units rented and the conditions of the rental. Rental keeps a comprehensive inventory of your serialised rental items, including asset depreciation, service and rental history records, giving you key insight into what's making you money now, and will make you more in the future.

Key functionalities include:

- Contract authorisation
- Flexible billing cycles
- Multiple sites management and contract grouping
- Recognition of Unearned Income
- Contract copy function
- Serialised and non-serialised rental units
- Pro rata catch-up invoices
- Full rental history by unit
- Depreciation and returns for items
- Automatic creation of assets through integration with Pronto Xi General Ledger

The screenshot displays the 'Create/Maintain Rental Contracts' window in the Pronto Xi Rental system. The window title is 'RENT M023 Create/Maintain Rental Contracts'. The interface is divided into several sections:

- Contract Details:** Contract Number: 6, Status: Active, Entered By: brucom.
- Customer Details:** Customer: AAAS01, Customer Name: Acme Building Group, Price Level: Price Level 0, Contact Name: Bill Thomas, Contact Phone: 07 3865 8180, Quote Reference: 36783, Reference: 90890.
- Other Details:** Branch: IV, Project: [blank], Cost Centre: 000, Rep Code: DJA, Warehouse: IV.
- Contract Dates:** Start Date: 08-SEP-2017, Base Anniversary Date: 01-SEP-2017, Guaranteed Period: 12, Guaranteed Unit: W, End Date: 30-NOV-2017.
- Invoicing:** Invoice Method: [blank], Invoiced: [blank], Invoiced From: [blank], Invoiced To: [blank], Invoice No: 0, Sales Order: 0.
- Billing Details:** Cycle: M (Monthly), Rate Change: 0.00, Effective Change: [blank], Discount %: 0.000, Damage Waiver %: 0.00, Stamp Duty %: 0.00, Charge 2 %: 0.00, Charge 3 %: 0.00, Charge 4 %: 0.00.
- Processing Options:** Automatic Shipping: y, Automatic Receiving: y.

See every activity against the rental contract, without having to leave the screen

Financials

When a rental contract is created, a percentage value can be added for stamp duty and damage waiver. You can create reminder notices when invoices are overdue and archive all customer correspondence within the contract notes.

Rental offers the flexibility of multiple billing cycles. You can opt to charge a deposit, invoice immediately or at a later date, and control the billing of items in a contract. Depending on your agreement with your customer, you can increase rental rates by CPI or use periodic increases.

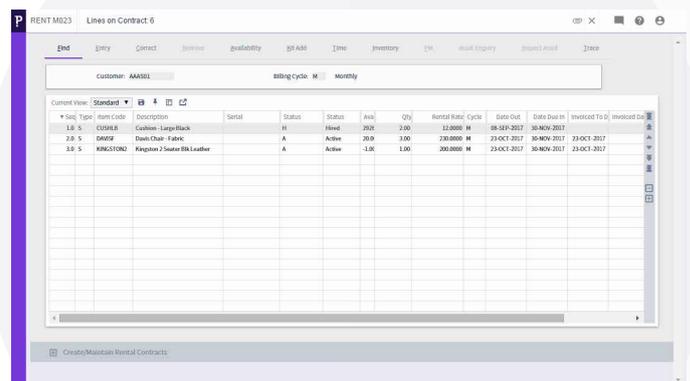
Complete integration with other Pronto Xi modules, such as Project and Service, means you can attach and post all revenue from a rental contract to a project and schedule the preventive maintenance of your equipment.

Rental is fully auditable and allows you to define the functions accessible by each staff member.

Charges

An extra charge (eg. a physical item, an attached service such as transport or installation, or simply a cost incurred) associated with the rental of a unit is linked to a particular unit on the contract line and is terminated from the contract at the same time as the unit. These charges can also be invoiced periodically, or by a lump sum charge on the first invoice.

The charges are represented by an item code entered in the inventory master file. If they represent a physical item supplied on the rental contract, they are effectively 'expensed' when the contract is created. Service options can be defined as a special (non-stocked) inventory item.



The screenshot shows a software window titled 'Lines on Contract 6'. It features a menu bar with options like 'End', 'Entry', 'Correct', 'Remove', 'Availability', 'Print Add', 'Time', 'Inventory', 'EM', 'Asset Enquiry', 'Printed Asset', and 'Trace'. Below the menu bar, there are fields for 'customer: AAA001' and 'Billing Cycle: M Monthly'. The main area contains a table with the following data:

Contract Line	Standard	Item Code	Description	Status	Status	Rate	Qty	Rental Rate	Cycle	Date Out	Date Due In	Invoiced To D	Invoice Date
1.0	S	CUSHLR	Cushion - Large Black	M	Have	200	2.00	12.0000	M	08-SEP-2017	30-NOV-2017		
2.0	S	DWDF	Dwell Chair - Fabric	A	Active	20.0	3.00	200.0000	M	23-OCT-2017	23-OCT-2017		
3.0	S	WINGSTONE	Wingspan 35waveride Leather	A	Active	1.0K	1.00	200.0000	M	23-OCT-2017	30-NOV-2017	23-OCT-2017	

See all activities on the rental contract – assets, inventory, charges, notes and dates

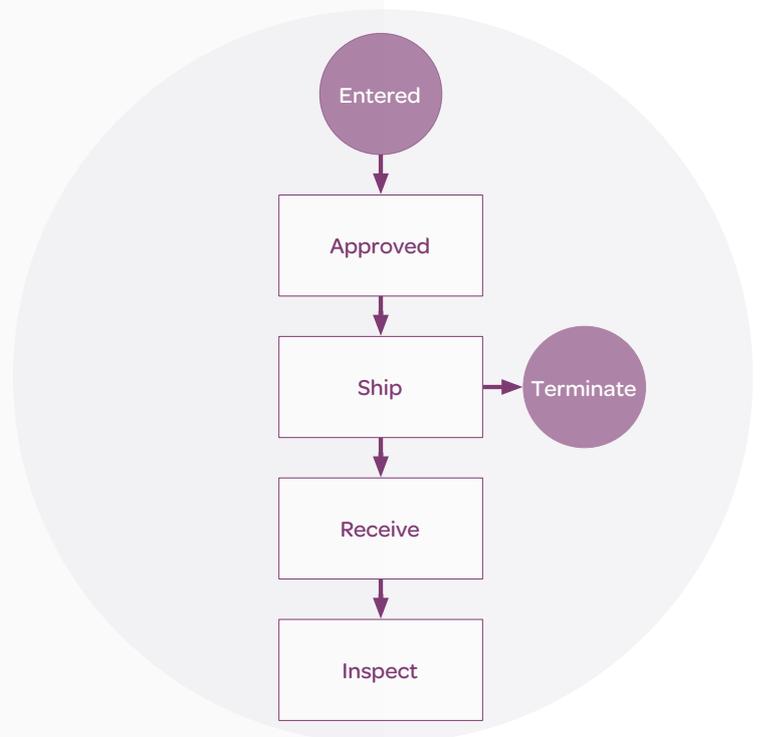
Contract lifecycle

A typical Rental contract goes through the following stages:

- **Entered** – The details of the contract are entered, including the items to be rented. Pronto Xi sets the status of each unit and addition on the contract to 'Allocated'.
- **Approve the contract** – Invoices can be raised against the contract and its status is set to 'Active'. The status of the units and additions is not changed.
- **Ship the rental items** – The various units, additions and options on the contract are shipped to the client's site and their status changed to 'On hire'.
- **Terminate the contract** – You can no longer raise an invoice against the contract and its status becomes 'Finished'. The status of the items on the contract changes to 'Off hire'.
- **Receive the rental items** – When rented items are returned, their status changes to 'Received not inspected'.
- **Inspect the items** – Received items are inspected and if they are in good condition their status is changed back to 'Available', and they are removed from the contract

Fixed asset units

Rental links into Pronto Xi Fixed Assets so that the serial number of a rental unit is assigned to the fixed asset. This allows accounting for the depreciation costs of the unit.



Contract invoicing

Customer invoicing is easily managed. The invoice value of a contract is the sum of the rental rate of each 'On hire' or 'Allocated' unit, addition and option.

Invoice process by design will bill in accordance with the billing cycle denoted on the contract, and depending on the agreement, for periods in arrears or in advance.

When invoices are raised, depending on your accounting requirements, a general ledger journal may also be raised, recognising the value of the unearned income as a liability, which is reduced as the income is earned. To allow for better reconciliation and revenue tracking, all billing history is registered against the contract, detailing periods billed, current and historical rates and item code details.

Pronto Xi Rental also makes it easier to efficiently raise credit invoices for either a partial bill cycle or the last invoice previously raised. A comprehensive Credit process allows for individual contract or bulk crediting if required. Alternatively, an Outages function allows for a credit to be raised for a given period for instances where equipment downtime prevented usage..

One-off invoices

In addition to recurrent invoices, 'one-off' invoices can be raised when the contract is approved, an item is terminated from the contract, or the contract is terminated.

This allows for adjustments to the initial and final rental invoices using the normal sales order functionality.

Billing cycle

Part of the definition of a rental contract is the 'billing cycle', which can be set to weekly, monthly, quarterly, yearly or other periods.

Pronto Xi can also cater for rental cycles excluding specific days, such as when weather conditions make it impossible for the hired equipment to be used. This also means that invoicing can be done for a seven-day week, a five-day week, or any required combination.

When an invoice is raised, Pronto Xi calculates the amount due for each unit by multiplying the number of invoiced billing cycles by each unit's rental rate. Units can be added or removed from the contract, with appropriate adjustments included in the next invoice.

By selecting the contract number and the customer code, recurrent invoices can be produced in bulk for a set of contracts. Each invoice is posted directly to the general ledger and to the customer's account.

Payment reminders

Overdue payments can trigger a reminder notice to be produced. The contract is automatically updated with notes regarding the reminders.

Tracking

Rental allows full serial tracking of items. Rental invoices and trial balances can be produced at almost any time.



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





info@pronto.net
1300 PRONTO (1300 77 66 86)
Find your moment: 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.