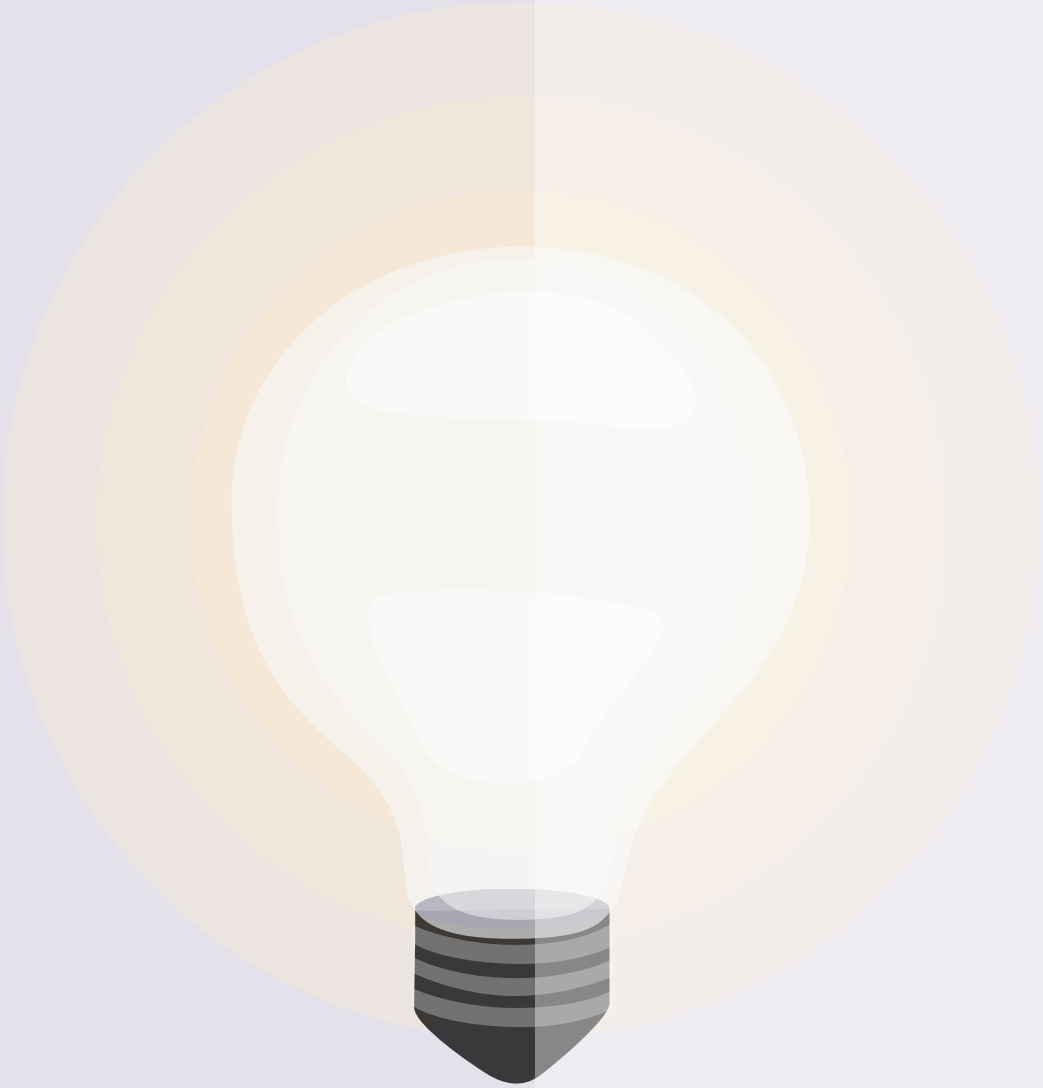
PRONTO Xi 740

Over. View

Pronto Xi
Solutions Overview

PRONTO
SOFTWARE



Welcome to Pronto

Find your moment

Welcome to Pronto
Contents

How we found our moment
A word from our Managing Director

For 40 years we've been helping our clients achieve better business outcomes. In that time we've worked with small and large businesses in Australia and around the world.

Today, our 1,700 customers choose Pronto not just for our industry leading software platform, but for who we are. Proudly Australian and owned by our staff, we're focused on growth through innovation and continued investment in new technology.

One of the reasons for Pronto's success is that we listen to and adapt to customers' needs. We're a mid-market business exporting our product all over the world, and we're honoured to help other Australian businesses do the same.

Headquartered in Melbourne, Australia, we have support offices and consultants across the country. To extend Pronto's services, we have launched the Pronto Cloud, Pronto iQ, and Pronto Woven divisions to assist you with your cloud, business intelligence and digital marketing needs.

Pronto's main Development Centre is based alongside the head office in Melbourne. Our sharp focus on R&D has seen investment in bold initiatives to move ahead of the times and provide solutions that solve tomorrow's problems. We maintain stable, long-term technology relationships while remaining fiercely independent, providing you with the best in IT innovation.

When you choose Pronto, you're choosing a partner with decades of innovation experience and customer focus. We're here to help you grow your business today, and we'll be here to help you take it to the next level tomorrow.

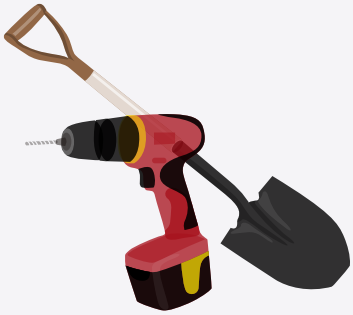
Chad Gates
Managing Director,
Pronto Software

Automotive

Chemicals

Facilities

Hardware

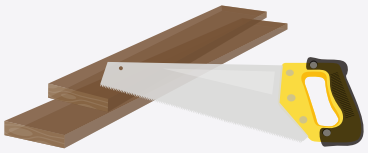


Utilities

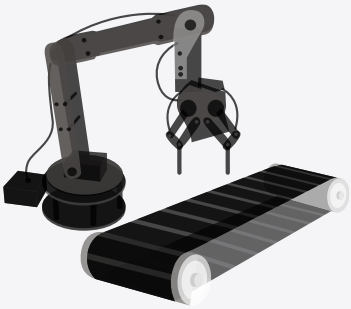
Retail

Service

Construction



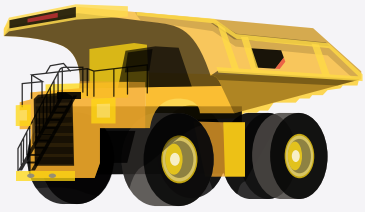
Manufacturing



Mining

Wholesale

Industrial Machinery



Newton didn't discover gravity the moment an apple landed on his head

If Newton hadn't been prepared for this exact moment, he mightn't have considered gravity at all. In fact, if his head hadn't been so full of math and physics, a falling apple could have just meant lunch.

Great moments in history are retold as moments of serendipity; chance encounters with exceptional consequences. In fact, this often couldn't be further from the truth. Great breakthrough moments are exactly that — a breakthrough. The moment when all of the hard work pays off, and the last piece of the puzzle falls into place.

They're the exact point where perspiration meets inspiration: a shift of perspective that makes the obscure obvious, and the impossible possible. Usually, all the elements for success are already there, they simply need to be revealed.

At Pronto, we believe that we can help you use the hard work you've already done to achieve incredible things. Our business management software is designed to give you easy and immediate insight into the innermost workings of your company, allowing you to make critical decisions quickly, and with confidence.

Pronto Xi is modular, which means you can build it around your business – not the other way round. Our staff and trusted global network of resellers are trained to listen to your requirements, ensuring they deliver a package that's complete, accurate and cost-effective because it's been designed specifically for you.

Our modules can be configured to complement just about every aspect of your business. No matter what your industry, we can help you examine your business in more detail – so you can increase productivity, lower costs and simplify tasks.

As your business grows, so too does the software running it – constantly adapting to new challenges to reveal new insights. So whether you're expanding your workforce or improving your workflow, Pronto Xi grows to accommodate. One system, every step of the way.

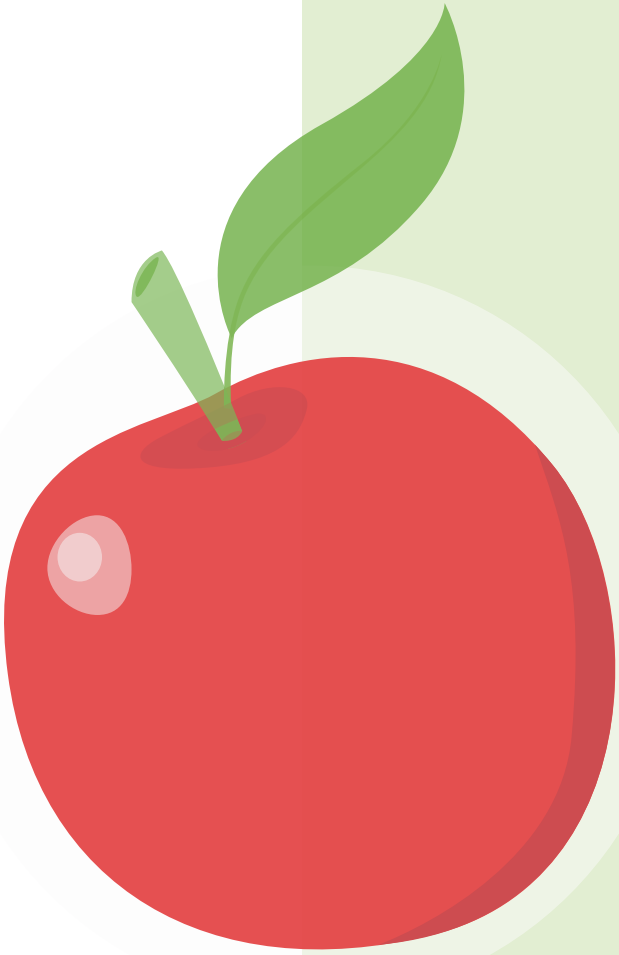
Find your moment

We develop software that helps you achieve moments of surprise and delight more often, so your needs lie at the heart of everything we do. We're committed to listening and learning as much as we can about your business, so we can understand exactly how we can help.

We have 40 years experience helping businesses over a wide range of industries across the world, and it shows. All of our products are backed by adaptable and dependable support and service. Our friendly, experienced people are always on hand to help, and our online web portal shares insights and information from around the globe, 24 hours a day.

We're proud of our reputation for working with our customers to make sure that their software stays not just up to date, but up to the moment.

By tailoring our fully integrated Pronto Xi product to suit your exact business needs, we can reveal parts of your business you never knew, and give you the control to take your business to places you never imagined.



About Pronto Xi
Getting to know you

Your business relies on tools that help to increase productivity, lower costs and simplify tasks. Instead of the market-standard one-size-fits-all approach, Pronto Xi will be configured in the way that's best suited to your business.

Start with our core offering of business basics, add the competencies that suit your requirements, and discover insights with intelligence built on IBM Cognos technology.

Core offering
Let's start with the basics

Ben Franklin said, "in this world nothing can be said to be certain, except death and taxes"; in business, things are a little more complex. No matter what your trade, size, or market, there are certain things you're going to need to take care of. From listening to businesses across the globe, we've developed the fundamental platform for Pronto Xi; a core framework that can expand and grow as you do.

Using Pronto Xi, you can establish a comprehensive general ledger, take command of tricky paperwork, optimise your supply chain, and more. You'll get instant insight into your business and be able to make crucial business decisions with confidence.

Additional competencies
Flex and grow

Our customers are as diverse in their fields as they are in their size. From our lasting relationships with clients in almost every industry, we've developed a comprehensive suite of competencies that encompass almost any facet of business. With the support of our Pronto experts, you can pick and choose the exact modules that suit your business. Furthermore, we can adapt our modules to suit your needs, so you can be sure you're getting the most out of Pronto Xi, as well as your business.

Whether you're a small local business, global manufacturer or anything in between, our diverse competency set gives you everything you need to have your business running smoothly.

Extra intelligence
Boost your business IQ

When juggling the myriad demands of a business, it's easy to overlook the finer details — and even easier to miss the bigger picture. Sometimes the answers to your biggest problems are lost in complex or repetitive data; sometimes your biggest problems are themselves obscured by an inability to pull back and see the big picture.

Built on IBM Cognos technology, our integrated Business Intelligence (BI) modules reveal unique business insights, from broad overview to minute detail. Trusted by over 23,000 leading companies around the world, Cognos gives you instant access to a range of tools to better analyse your business through a single, easy-to-use interface.

It can even be accessed online, giving you access to information at the moments you need it most.

Our analytics, fine-tuned to your exact requirements, work hard to uncover the numbers and patterns that inform the most crucial business decisions.

Technology

Platform

- Core platform
- Web interface
- Enterprise security
- Forms management
- Tasks & Alerts
- API integration platform
- Developer tools

Deployment

- Cloud ERP
- On premises

PRONTO Xi

Competencies

Financials

- General Ledger & Fixed Assets
- Accounts Receivable
- Accounts Payable
- Resource Management
- Payroll & Employee Portal

Distribution

- Inventory
- Sales
- Purchasing

Sales & Marketing

- Point of Sale
- eCommerce
- Repairs
- CRM
- Mobile Sales & CRM

Supply Chain

- Warehouse Management System
- Distribution Requirements Planning
- Advanced Forecasting
- Electronic Data Interchange
- Radio Frequency
- Scanpack
- Catalogue

Asset & Facility

- Project
- Service
- Service Scheduler
- Mobile Service
- Service Connect
- Maintenance Management
- Rental

Manufacturing

- Shopfloor
- Planning
- Scheduler
- Laboratory
- Quality Management

Intelligence

Applications

- BI Essentials
- BI Administration
- BI Manager
- BI Designer
- BI Schema Manager

Visualisation

- KPI Workspaces
- Reports
- Mobile BI

Data

- KPI Library
- Reporting data packages
- Data Quality Management
- Data Intelligence
- Analytics Cubes

Competencies
The tools of your trade

You can easily select individual modules from our competency set to adapt to your unique needs.

Foundation
A platform to build on

To run as cleverly and seamlessly as they do, all of the modular Pronto Xi Enterprise applications depend on a core infrastructure that's virtually bulletproof.

It begins with the 'nuts and bolts' that allow the system to operate: the relational database, the operating systems, the Pronto Xi Runtime; and the web interface, which is the portal to Pronto Xi applications.

For added flexibility and choice of connectivity, Pronto Connect offers industry standard RESTful APIs that allow web, mobile and others applications to access Pronto Xi data via web services. This opens the door to integration opportunities, allowing you to transform you Pronto Xi solution into a platform of connected applications with the reliability and transactional performance of Pronto Xi at its very core.

With a rich Applistructure layer, you can make Pronto Xi the perfect fit for your unique business needs. Set up system alerts, define system tasks, create information 'data grids' that can be used as part of a particular business process, customise screens with the most important information for your operations.

Take control of day-to-day Administrator tasks – from performing backups and setting network protocols to defining roles and security settings – with complete ease.

Developer Tools are available for businesses that want to do their own customisation, including the Rapid Application Development (RAD) and a Software Development Kit (SDK).

Financials

A system you can count on

Pronto Xi's powerful transaction engine integrates all your financial activities into a single control centre, giving you the power to manage your finances from the same place.

Achieve perfect balance with the fully integrated General Ledger, and get the complete financial picture of your business and its operations with automatic posting of transactions from sub-ledgers including Accounts Receivable, Accounts Payable and Inventory. It even takes care of your payroll, including full-time, part time and casual employees, hourly rates and annual salaries.

By presenting the financial outcome of your organisation's activities, Pronto Xi Financials gives you the crucial insights and information necessary to monitor and maintain your bottom line.

Distribution

Everything to everyone

Keep the heart of your supply chain healthy with Pronto Xi Distribution.

Easily handle all aspects of your sales ordering and automatically update your stock and inventory levels.

Get a clear picture of inventory across all of your business's locations with real-time tracking of stock levels and movement.

Keep a keen eye on the stock coming in and out of your door with the Sales and Purchasing modules. Automatically allocate backorders and stock replenishment, calculate freight, and track despatch across multiple countries and currencies, all while having full access to your history.

Sales and Marketing
Make money talk

Keep your Omni-Channel initiatives and ecosystem in clear focus. From Point of Sale and eCommerce to nurturing customer relationships with CRM, you'll be able to make sure your customer service stays top of mind.

Our Mobile Sales app manages all aspects of your prospective and existing customer relationships, clearly showing you who will need the most attention in the future, driving customer satisfaction and repeat business.

Increase lane throughput with powerful Point of Sale software, and let your staff focus on customer service.

Take your business online with our easy-to-use eCommerce portal, and create a secure, reliable and simple shopping experience for customers around the globe.

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

Supply Chain
Moving right along

With seamless co-ordination and integration of your product, information and distribution network, you'll not only keep track of your supply chain as it stands, you'll be able to forecast where it's going in the future.

Automate supplier priorities, lead times and inventory targets to make sure your supply always matches your demand.

Keep tabs on your sales and despatch processes with a state-of-the-art wireless, paperless scanning system.

Optimise your supply chain planning with accurate, real-time inventory management and analysis, designed to help understand trends and reveal insights into your future demand.

And ensure optimum efficiency with an extended warehouse and inventory management system that affords automatic allocation of incoming goods to locations, efficient picking, automatic replenishment, despatch confirmation and location control of warehouse stock.

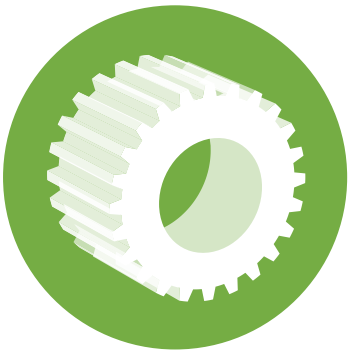
Asset and Facility Management
Simplified services

Manage the life cycle of your service calls efficiently with a clear view of resources and customer issues, and share call information with customers through a user-friendly web portal.

With Pronto Xi Mobile Service delivering call out details from head office to technicians on the road, your team arrives better prepared. Manage day-to-day engineer activities, capture parts used, finalise the support call and take payment, all on a mobile device.

Manage projects with a fully integrated Project Management solution. From tender stage to project delivery, Pronto Xi Project manages all resources, tasks, and milestones so you can focus on exceptions.

Reduce asset failure rates and maintenance costs with Pronto Xi Maintenance Management. Monitor detailed maintenance schedules to extend equipment life expectancy, ensuring your assets are optimised.



Manufacturing
Make more with less

Take control of quality with our flexible suite of manufacturing tools, designed to cater to almost any production technique from Make to Stock through to Configure to Order. From trimming the fat on the factory floor to bulking up production volume, you can ensure your operations are ship-shape.

Plan your production properly with paperless reports of manufacturing resources and raw materials, and comprehensive feedback on consumption and production results.

View your entire operations at a glance and adapt production routing to maximise your manufacturing resources. Gain better insights into how resource capacity impacts your production requirements and reduce product cycle time to meet your deadlines.

Support continuous improvement and quality management through tighter process control to meet your certification requirements.

Intelligence
Get a clear picture of your business performance

You can select individual intelligence modules to reveal issues and opportunities within your business.

Pronto Xi Business Intelligence puts powerful business insights at your fingertips. Combining dynamic Key Performance Indicators (KPIs), dashboards and the ability to create your own custom reports, Pronto Xi Business Intelligence is helping you dig deeper into any aspect of your operations.

Pronto Xi Business Intelligence is designed to be user-friendly, so there are no barriers to retrieving the information you need.

Having the right insights available when you need them allows you to make better decisions more quickly, and empower staff to act based on real-time data visibility.

Applications
Unlock deeper insights

Pronto Xi Business Intelligence is powered by IBM Cognos Analytics, offering an industry leading Business Intelligence platform.

Complementing IBM Cognos are a range of Pronto Xi applications developed to take your data analysis to new heights.

Our business intelligence platform means you have access to better insights, faster:

- Out-of-the-box operational and financial reports
- Integrated data model for to easily build your own custom reports and dashboards
- Access to Business Intelligence applications provided to all Pronto Xi users

Additionally, Cognos Mobile BI provides an interactive and secure environment for viewing and analysing data on compatible smart devices.

Visualisations
See between the lines

Pronto Xi Business Intelligence is packed with data visualisation tools, providing you a clear picture of your business performance.

Stunning dashboards and KPI widgets are easy to create and customise, giving you a powerful view across your business.

Charts and reports are available straight out-of-the-box, or configured to suit your unique requirements. A range of display options are available to best demonstrate your data, and you can easily share your findings with others.

Data
Better data. Better decisions

Behind the rich visualisations available in Pronto Xi, a vast amount of data drives the reports you use to make decisions every day.

Whether accessing KPI snapshots via Workspaces, or building real-time reports from transactional data, Pronto Xi can deliver all the answers you're looking for.

Finally, ensure the quality of your data with Pronto Xi Data Quality Management (DQM). DQM ensures the integrity of your data through periodic scanning of records, followed by user alerts and suggested actions.

The Pronto Xi web interface
Live on the net

Designed for the user

Our innovative approach to User Experience (UX) design is all about simplifying processes and making you more productive. Using modern web technologies, we now deliver a fast and responsive interface that's accessible no matter where you are or what device you're using.

Designed for user delight

Although modernised, the web-based UI retains the familiarity of Pronto Xi. Navigating screens and menus, entering and viewing data, running reports, and configuring user preferences and favourites are all straightforward. Differences in data entry needs are catered for, whether you're using a keyboard and mouse or a touch-screen mobile device.

Whichever Pronto Xi modules you are using, there is a consistency in format and function that makes learning new modules quick and easy.

Full Pronto Xi within a web browser

Elegant and intuitive to navigate

Supports personalisation and shortcuts

Increased user productivity

Quick to learn and easy to use

Available on a range of devices

Stateful and secure connection between web interface and server

Web socket technology delivering real-time, field-level validation and entry

HTML5 and CSS3

Latest web UX methodologies

Highly accessible

Using a web-based UI means you can do what you need to do, when you need to do it, from anywhere and without any software installation.

For system administrators, rolling out new client updates, or adding additional system users is more straightforward. And both desktop-based and web-based UIs can be deployed at the same time.

Fast, faster, pronto

There are few functional differences between the web interface and the desktop Pronto Xi Enterprise Client. Innovative web-socket technology provides a real-time connection between the browser and the Pronto Xi database.

Consistent with the desktop-based Pronto Xi Enterprise Client, data entry validation happens at a field-level in real time, not at the end once the form is submitted. Not only does this avoid any lag time and data re-entry, it also ensures that business process rules are followed during a transaction, making the user more productive and helping them to complete their tasks as efficiently as possible.

Pronto Services
Switched-on support

Get the most out of your Pronto Xi system with our comprehensive support team leading the way

Our consulting team will guide the implementation of your Pronto Xi system from start to finish. Our consultants have a wide range of practical business experience across a variety of technologies and industries, so you can be sure you're talking to someone in the know. Armed with analytical skills to properly understand the nuances of your business, they're ready to adapt your new business management software and reveal what it can do for you.

We use our proven implementation framework to make sure your system is installed on time and on budget. This starts with a detailed project plan to map out the schedule and get everyone on the same page. This typically includes:

- Project management
- Loading Pronto Xi on to your servers or in the cloud
- Matching Pronto Xi to your business processes (including forms and report design)
- Converting data from your existing systems
- Staff training (or being on-hand if you prefer to use internal trainers)
- System tests
- Unique interface building and customisation

Before handing over the reins we'll help you carry out testing of your new system. This includes running business simulations to resolve any potential issues, building clear, bespoke user interfaces and making any necessary final amendments or customisations.

Finally, we're there to assist you through the go-live process, taking you right up to the moment you've truly got full control over your business.

Getting things started

We have a tried and tested framework to ensure Pronto Xi is up and running as efficiently as possible. We call it the Pronto Implementation Methodology, or PIM. It's a great way to make sure we deliver your new Pronto solution on time and on budget.

We start by working with you to establish a cooperative and controlled project charter document. This document will help us achieve the correct timing and sequence of implementation processes, and let you know when you can expect tasks to be complete.

Detailed checklists ensure tasks are carried out according to the project plan. And we'll produce regular reports that will allow you to monitor and track progress.

Over the years our methodology has proven not only to make the implementation process easier, but also drastically reduce the risks usually associated with such a business-critical project.

Training

PIM also identifies your training needs based on the Pronto Xi modules being installed, how they'll be used and by whom. Training is also available post-installation for new staff or those moving into new areas of Pronto Xi.

Information about available classes, including dates, locations and registration are posted for registered users on our internet knowledge base. Classroom courses can be organised either as public training or on-site company-specific training for your business.

Ready for anything

We know that in our business, there's no such thing as 'one size fits all'. Our team are always looking for new ways to adapt our product to best benefit your business, and then delivering those enhancements as quickly as possible. The architecture of Pronto Xi is designed to accommodate these customised enhancements when upgrading to new releases in the future.

Always on hand

Your Pronto Xi installation will be backed by comprehensive ongoing support that's always ready to listen and adapt to your needs. Our support services include a dedicated help desk and online knowledge base, as well as fixes and workarounds for software issues.

Our staff members have practical experience across a range of industries, company roles and Pronto Xi modules. They've gained experience as software users, accountants, warehouse managers, production managers, administrators and project managers. This means you'll always be connected with a qualified staff member who understands the specific needs and requirements of your business.

Leave IT to us

Let us take care of your IT system, so you can concentrate on your core business. Pronto's cloud and hosted solutions provide custom service packages that will see us manage, monitor and maintain your IT infrastructure.

Offering enormous flexibility to adapt or scale system software, our solutions can provide your company with the specific tools you need to do business. And with a simplified, easy-to-use IT set-up, it can also help you to save on overheads.

One step ahead

Our maintenance agreements give you full access to future product upgrades, new features and enhancements developed for Pronto Xi.

Wealth of knowledge

In addition to our dedicated help desk we also offer a range of online tools to help you quickly find answers to your support questions.

Our web support resources are continually updated to include news, user forums and handy hints, as well as full product manuals, release notes and fixed-readiness information.

Our forums give you access to a community of Pronto users, developers and help desk staff, giving you insight into Pronto products and services from across the board.

You can log and track your service calls on the web. You'll be sent an email confirmation including your call number so you can follow its progress online in real time.

PRONTO Xi

Business Intelligence

Get a clear picture of your business performance

Business Intelligence
Contents

Pronto Xi Business Intelligence
Get a clear picture of your business performance

Whether you're looking for today's sales figures in real time, or you want to analyse 12 months' worth of data, Pronto Xi Business Intelligence can do it all.

Pronto Xi Business Intelligence is designed to be user-friendly, so there are no barriers to retrieving the information you need. With Workspaces, team members can quickly and easily create personalised dashboards to track their main business KPIs. Workspaces is fed by our KPI Library, which collects data on a large number of standard KPIs and business metrics. This aggregated approach provides lightning fast access to stored data in Workspaces.

A wide range of operational reports are available to assist in day-to-day activities, showing outstanding invoices, to orders ready to ship, and more. These reports can be scheduled to run at the beginning of each day, or updated anytime to show real time data. Team members can even email reports to other users straight from Pronto Xi, making it easy to share information and collaborate on decision making.

Having the right insights available when you need them allows you to make better decisions more quickly, and empower staff to act based on real-time data visibility.

Pronto Xi Business Intelligence features fully integrated IBM Cognos Analytics, an enterprise level package for report authoring and distribution. With IBM Cognos Mobile, users are able to enjoy the same rich visualisations they're used to on their smart devices.

With Pronto Xi Business Intelligence you have the power to turn your business data into valuable insights.

Applications
The right tools for the job

Pronto Xi Business Intelligence is fully integrated with IBM Cognos Analytics, offering an industry leading data management platform.

Complementing IBM Cognos Analytics are a range of Pronto Xi tools developed to take your data analysis to new heights.

A smart set of tools coupled with a class leading platform means you have access to better insights across your entire business, faster.

IBM Cognos is an enterprise level report authoring and distribution package, which means all the report generation and distribution can be handled automatically. It allows everyone to get the information they need, while only having access to the information you want them to see. Reports can be run 'on-the-fly' or scheduled so they automatically arrive for everyone's viewing pleasure.

There are multiple components to IBM Cognos, all playing a specialist role in helping you manage and get the most out of your data. When combined with Pronto Xi Business Intelligence, users have the ultimate power to get the most out of their data.

- Pronto Xi delivers out-of-the-box operational and financial reports
- IBM Cognos has the tools to build your own custom reports and dashboards

Additionally, Cognos Mobile BI provides an interactive and secure environment for viewing and analysing data on compatible smart devices. You can access Active Reports, which are fully featured, highly interactive offline report applications, meaning you don't have to rely on network connectivity when travelling.

Pronto Xi BI Designer helps you combine a full range of visuals to best display your data. Different types of charts and lists can be shown together, and logos and other visual assets can be added to complete the reporting picture.

Pronto Xi BI Schema Manager can ensure any nonstandard fields are available to access in your reports by allowing you to link customised data with out-of-the-box reporting data packages.

Through Pronto Xi BI Administration, IT administrators can set report date ranges, reporting roles, and even security policies for Mobile BI users such as time-expiry on cached mobile report content.

Visualisations
20/20 vision

Pronto Xi Business Intelligence is packed with data visualisation tools, providing you a clear picture of your business performance.

Stunning dashboards are easy to create and customise, giving you a powerful view across your business.

Charts and reports are available straight out of the box, or configured to suit your unique requirements. A range of display options are available to best demonstrate your data, and you can easily share your findings with others.

Workspaces

Workspaces is an interactive, drag-and-drop canvas that displays relevant business KPIs to each staff member.

It's customisable to include only what you need right now, and aggregated data makes for fast performance. Choose from a wide range of visualisations to display your insights.

Select from pre-defined measures in the KPI Library and easily see how you're performing. The user friendly layout makes it easy for all users to add and change widgets quickly.

Designing your own Workspaces canvas is simple. Drag-and-drop the relevant widgets, and change them out as your information needs evolve. You can change the layout of the widgets, select different chart types, and more.

Key Performance Indicators

Our KPI Analysis tools allow you to go deeper into your business data, revealing exactly how you're tracking against critical business goals.

Choose your drill path, and slice and dice the data to explore the relationships that matter to you. Apply custom filters to focus only on the most important data, add multiple variables, and analyse trends over time.

It's easy to compare your performances by territory, categories, time period, or however you need. The KPI data provides great insights into broader business performance, providing a starting point to fully exploring and analysing your data.

There are a range of visualisations available to help you display the data in a meaningful way, making it easy to share your insights with other users.

Operational Reports

Pronto Xi delivers ready-to-go operational reports that provide insight into the day to day performance of the business. These include a suite of financial reports, as well as commonly accessed reporting on Sales, Purchasing, and Service amongst others. Instantly check inventory history, revenues, engineer allocations, or any other key reports necessary.

Report data is sourced directly from live transactional data, meaning information is provided in real-time. Alternatively, set reports to run on a schedule. You can also automatically email them to the intended recipients.

Report data can be exported in a wide range of formats to cater to the needs of all users.

Cognos Custom Reports

With fully integrated IBM Cognos Analytics, users can create a wide range of custom material. Run, schedule, export, and share reports as needed, in the format you need them. You can even specify the scope and type of information presented, tailoring the report output to each audience.

Cognos Custom Reporting allows you to author meaningful data displays at any level of the business, honing in on the areas that matter to you. Create dashboards for real-time performance monitoring, and schedule regular content for use in presentations and board packs.

Combine data from different reports to give a more complete business performance picture without losing any of the details.

Mobile BI

In an increasingly mobile business environment, decision makers are demanding to have the same level of access to their data wherever they are in the world. With Pronto Xi, users enjoy the same rich visualisations on their smart devices thanks to IBM Cognos Mobile.

The responsive layout allows users to view multiple chart types on their smartphones and tablets, and drill into data levels as required.

Importantly, IBM Cognos Mobile provides a security-rich environment for Apple iOS and Android.

Data
From numbers to insights

Behind the rich visualisations available in Pronto Xi, a vast amount of data drives the reports you use to make decisions every day.

Whether accessing KPI snapshots via Workspaces, or building real-time reports from transactional data, Pronto Xi can deliver all the answers you're looking for. For large dataset analytics, Pronto Xi Analytics Cubes is a powerful tool for processing high volumes of data at a rapid rate, meaning you're no longer spending time waiting for your reports to run.

Ensure the quality of your data with Pronto Xi Data Quality Management (DQM). DQM is a tool designed to ensure the integrity of your data through periodic scanning of records, followed by user alerts and suggested actions.

KPI Library

The KPI Library includes a large number of industry standard KPIs and business metrics. The data is aggregated and stored based on pre-defined drill paths, providing fast access to your critical data. Choosing your own snapshot frequency means the data is as fresh as you need it to be.

Data is aggregated across most Pronto Xi modules, including General Ledger, Accounts Receivable, Sales & Inventory, and more.

Transactional data

Access your operational data and build reports and dashboards with IBM Cognos Analytics. You can access live, real-time data when you need it, improving the accuracy and timeliness of operational reports and monitoring.

The operational reports are provided with in-built filters, giving users greater control of the information that is displayed.

Data Quality

The quality and integrity of data is of utmost importance when it is relied upon to make critical decision about your business.

Pronto Xi Data Quality Management (DQM) provides visibility and certainty about the integrity of your data.

DQM will monitor the integrity and relationships within your data and highlight areas that require attention. Users receive alerts, and can access a dashboard of exceptions to review and action any flagged items.

DQM also has a range of advanced data correction tools to help in system to system migrations, poor quality data coming from legacy systems, and more.

Best of all, DQM can be run in the background, ensuring the quality of the data without having a big impact on users.

Data Intelligence

Pronto Xi Data Intelligence (DI) makes it easy to create your own data tables. A user friendly interface makes it easy to create, filter, and sort the data tables you need, without needing highly developed technical skills.

Beyond this, DI Objects allows you to easily merge existing tables, input calculations and other rules, and combine data from multiple tables.

You can even schedule data populations to happen in the background, and automatically create list-style IBM Cognos reports, or author more complex reports.

Analytics Cubes

Pronto Xi Analytics Cubes provide precisely the data you want, in the structure that suits you best. Cubes also support snapshot data, allowing you to analyse past performance trends, and multi-dataset reporting. Importantly, Cubes are designed to analyse data, not just store it, and can do this at a rapid rate. They can also process much more than traditional databases.

With powerful Pronto Xi Cubes, you gain the power to combine and consolidate multiple instances of Pronto Xi, giving you a complete overview of complex business structures and scenarios. You gain the ability to do dynamic 'what if' reporting forecasts, which can assist with business strategy and the decision making process.

PRONTO xi

Financials

A system you can count on

Financials
Contents

Accountability is the bottom line

Maintaining tight financial control is a fundamental part of any business. Pronto Xi Financials consists of four core modules that allow you to consolidate all of your financial activities into a seamlessly integrated whole. This ensures you have the right information at the right levels to manage your business's financial needs.

Take control of accounts receivable and payable, manage assets and understand your financial position at any moment. Monitor Key Performance Indicators (KPIs) and the outcomes of business operations to optimise your bottom line.

You can also choose to add Pronto Xi Payroll to manage the often-complex demands of employee entitlements, payments and accruals.

An integrated system you can count on

With Pronto Xi Financials, you can have complete confidence in the financial position of your business.

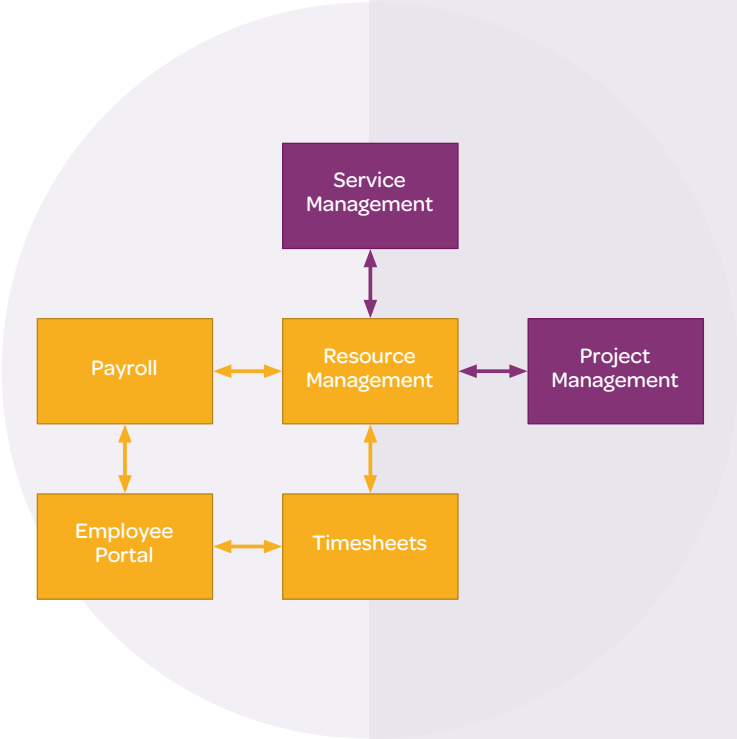
The four core modules – along with an optional additional payroll module – form the basis of your Enterprise Resource Planning (ERP) system, delivering key business information to provide solid strategic decision support.

Pronto Xi General Ledger is a powerful and flexible solution to manage the financial requirements of a wide range of industries. It presents the financial outcome of your organisation's activities, delivering key business information to provide solid strategic decision support.

Pronto Xi Fixed Assets is a dynamic, robust tool for managing assets from acquisition through to disposal. The Fixed Asset suite is perfect for companies dealing with multi-national compliance and reporting.

Pronto Xi Accounts Receivable manages accounts receivable in a wide variety of environments, including wholesale, retail, service, project management and manufacturing. All sales transactions are automatically processed to Accounts Receivable with real-time postings to the general ledger information flow within your system.

Pronto Xi Accounts Payable allows you to effectively control your supplier accounts. Fully integrated with Pronto Xi General Ledger and Purchasing, it gives you a full view of supplier arrangements, transactions and approval levels.



Resource Management is a planning and management tool for human and non-human resources. Complete with a thorough work roster and employee award system, it allows you to ensure resources are utilised to their capacity and appropriate awards and allowances are allocated to payroll.

Pronto Xi Payroll is specifically designed for Australian organisations. Fully integrated with the core Financials modules, it allows you to easily and accurately process and monitor an employee's pay, including entitlements, benefits and accruals. This solution enables businesses to comply with SuperStream and Single Touch Payroll legislation requirements.

Pronto Xi Employee Portal is a web application designed for all staff that reduces paper-based processes and allows users direct access to employee-related information such as personal, banking and pay details, as well as entry of timesheets and leave requests.

Pronto Xi General Ledger
Keep a tight rein on your finances

Pronto Xi General Ledger is at the heart of your Enterprise Resource Planning system, reflecting all the financial transactions processed in other Pronto Xi modules.

Features include:

- Multiple companies, divisions and cost centres
- High degree of automation
- Designed to process high transaction volumes
- Integrated audit and tracking to help with regulatory compliance
- Multiple budgets and forecasts
- Consolidation including foreign subsidiaries
- Extensive reporting capabilities utilising various reporting hierarchies

Master Chart structure

To meet your organisation's specific reporting requirements, Pronto Xi has a Master Chart structure that allows you to specify what each character within an account code represents.

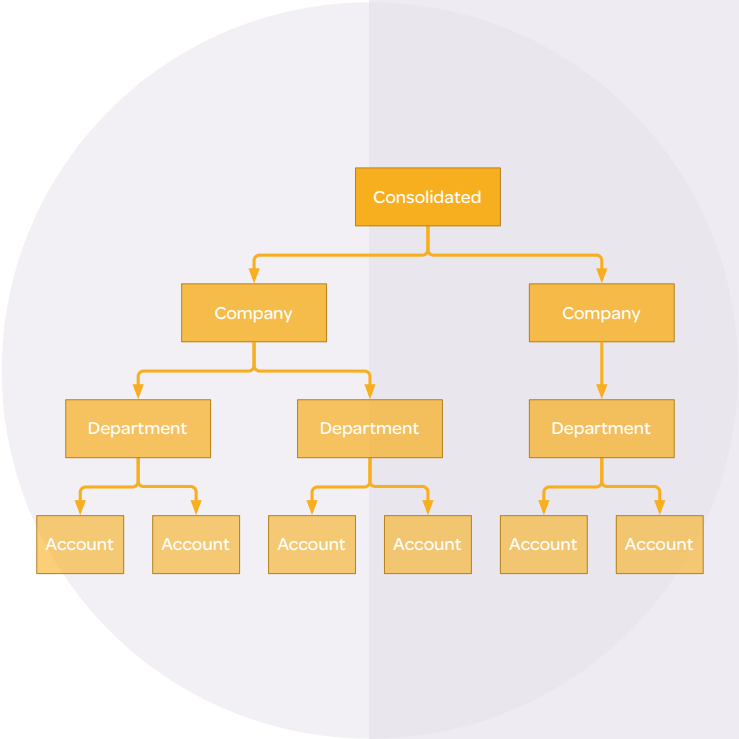
For example, the first two characters of an account code may represent the company, the next four characters a cost centre, characters 7 and 8 a department, and characters 9 to 12 the natural account code.

Having defined which codes are valid for each component of the Master Chart, you can generate all, or a selection, of the general ledger accounts. This has the added benefit of reducing the chance of posting to incorrect accounts.

Account features

Pronto Xi General Ledger automates the flow of postings to the general ledger according to your requirements (using special accounts to specify how Pronto Xi will map each transaction onto the General Ledger). This means that your data entry staff requires only minimal knowledge of general ledger postings.

For management and statutory reporting, you can maintain multiple budgets and forecasts for each account code, and generate a variety of management reports, creating different views based on any number of Hierarchies (in base or foreign currencies).



Adaptable General Ledger accounts

Your chart of accounts can change as your business changes. As you grow, your account structure can grow with you.

If your company uses one character for a region code and the number of regions increases, you can expand the account code to handle a larger range. Pronto Xi will maintain data integrity on the live general ledger, including all archived history and related sub-ledgers.

Statistical accounts

To simplify reporting on non-financial KPIs, such as cost per unit produced, revenue per employee and cost per kilowatt, Statistical Accounts collates relevant non-financial operational data.

Expense accounts

Additional details, based on user-defined tables, can be captured for expense accounts. This is particularly useful for expenses such as entertainment, telephone and travel by employee, as well as advertising by campaign.

A common approach to budgeting

Flexible and intuitive budgeting capabilities are provided across the General Ledger, Configurable Budgets and the Reporting Hierarchies Budgets.

This common approach delivers:

- Seamless interaction with MS Excel
- Budget collaboration processes
- Spreading and automated budget adjustments
- Combine actuals with budgets to create adjusted budgets/forecasts
- Sophisticated budget notes & auditing functionality

Budget maintenance and reporting

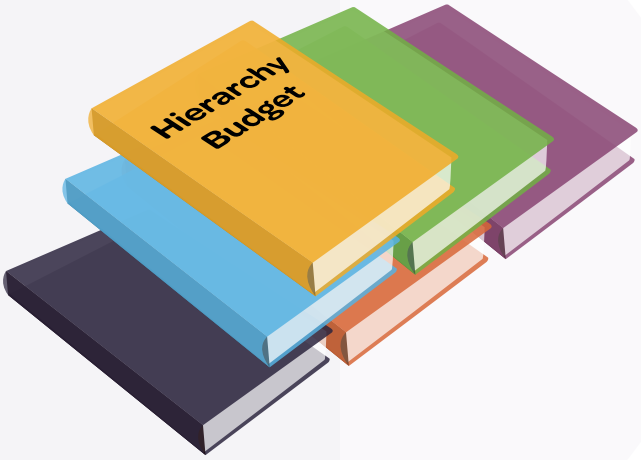
The GL Budgets provide a powerful, simple, flexible and intuitive approach to meet the most demanding financial budgeting requirements.

The GL Budgets have been optimised for easy data manipulation meaning users can utilise a set of in-solution tools or leverage the power of MS Excel. These tools allow users to create adjusted forecasts by combining actuals and budgets, apply spread factors and export and import seamlessly with Excel.

The GL budgets allow everyone to contribute to the budgeting process using a structured contributor budgeting system which maintains flexibility and simplicity. The Budget Contributor Management function allows individualised and recipient specific sub-budgets to be distributed. These separate contribution budgets can then be aggregated into the master budget.

Sales and inventory budgets can be pushed up to specified general ledger account budgets, meaning the important information within the operational budgets can be leveraged into the GL budgets.

Hierarchy views allow users to intuitively view and interact with their budgets based on their GL hierarchy budgets. Your budgets roll-up or expand based on the same structure as your P&L or Balance sheet.



Configurable Budgets

Configurable budgets allow users to create sales based budgets using any combination of attributes on the customer or inventory master records. The budgets can be created either daily, weekly or per period and based on a range of measures including: value, quantity, gross profit, gross profit percentage and quantity.

So for instance, you could create a three-level budget based on a mixture of: Brand, Class, Category, Group, Territory, Warehouse, Industry, or any combination of the attributes on the Item or Customer Master.

A valuable and popular function of configurable budgets is to create quantity based item by customer budgets which roll up to warehouses. These budgets can then publish a forecast which, because it aggregates to warehouse, can be used to drive both Material Requirements Planning (MRP) and Distribution Requirements Planning (DRP).

These configurable budgets can be constructed to leverage special account structures to push the sales budget values up the relevant GL budgets to provide simple yet practical bottom up budgeting.

Configurable budgets have been optimised to export to and import from excel. This capability has been further developed to allow stakeholders from across the business to contribute to the budgeting process using the budget contributor management function.

Hierarchy Budgets

Reporting Hierarchies have been used to structure unstructured data or restructure structured data. Hierarchy Budgets now allow users to create budgets based on any existing Reporting Hierarchies.

The Hierarchy Budgets are quick & simple to create. Importantly they provide the flexibility to budget at any level of granularity and the budget will then roll-up to the higher levels.

General Ledger Hierarchies

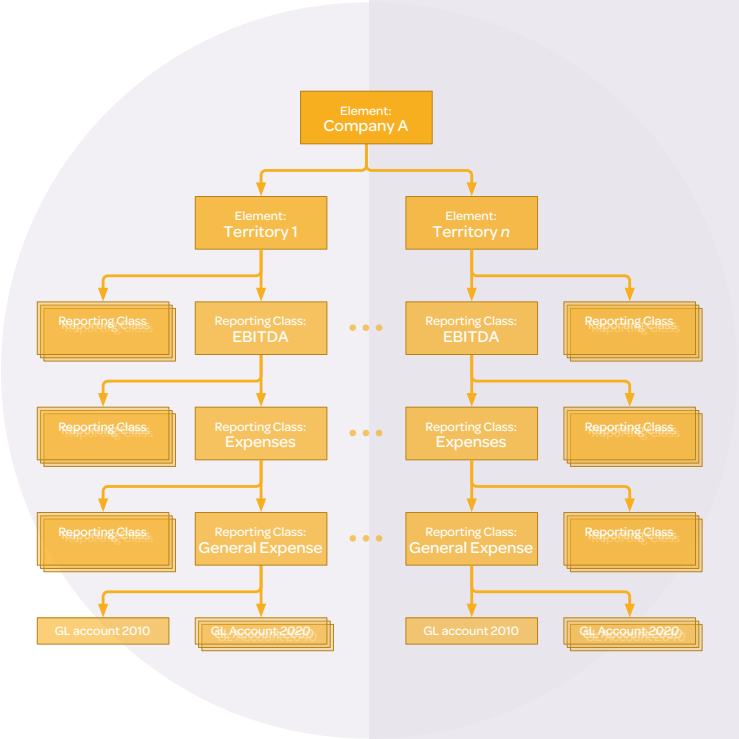
General Ledger (GL) Hierarchies provide flexibility in how the GL accounts are structured for reporting purposes. The reporting hierarchies allow GL accounts to be structured differently depending on the desired reporting outcome. Because an organisation isn't limited to a single view of the world, everyone can get the reporting they need, without compromise.

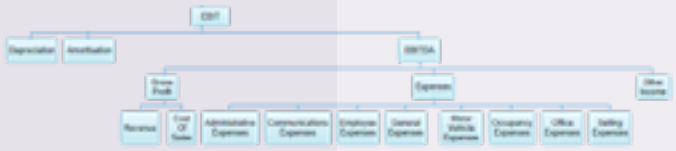
Hierarchies based on simple parent-child relationships

Anyone with a knowledge of accounting can easily produce financial reports using GL Hierarchies. It lets you define the structure as a series of simple parent-child relationships in line with fundamental accounting principles. For example, 'Current Assets' may sit under 'Assets' and so on. Once the structure is defined, all users need do is determine where their natural accounts should attach to the hierarchy. So what is simple in concept is now simple in practice.

Out-of-the-box financial reports

A selection of predefined, compatible financial reports and GL Hierarchies is available. Simply attach your natural accounts to the appropriate spot within the hierarchy for out-of-the-box reporting with an easy, intuitive process. Reports include P&L, Balance Sheets and a Statement of Cash Flows, with varying levels of detail available.





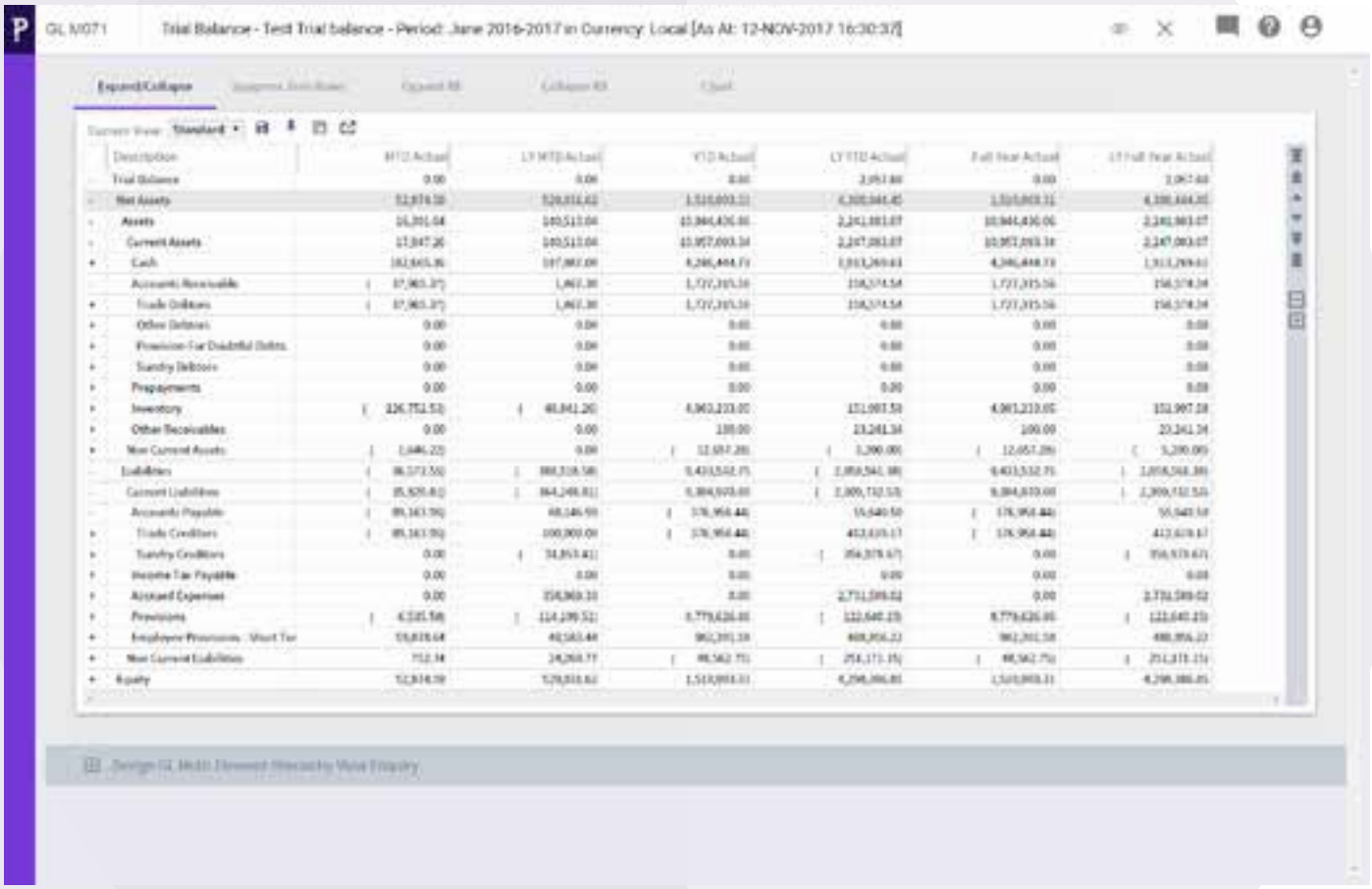
A small subset of the General Ledger hierarchies available in Pronto Xi

Customised financial reporting

Create your own hierarchy structures and reports. Begin with predefined hierarchies and make any necessary changes, or create hierarchies from scratch to get completely bespoke reporting outcomes. From there, you can assign a single natural account to report in different places within a report (e.g. a transport company may have a natural account for fuel, but the logistics department wants it to appear as a Cost of Sales account while the marketing department wants it as an expense). You can set accounts like Cash at Bank to appear as an asset when it has a positive balance, and as a liability when it has a negative balance. Use this to build hierarchies based on natural accounts or full GL accounts

Delivering complex outcomes from simplicity

Being built on simple parent-child relationships, the GL Hierarchies are intuitive and easy to understand. While generally populated with natural accounts, they can also be combined with separate hierarchies based on the various elements of the master chart to deliver complex reporting outcomes.



Analyse your financial performance using inbuilt hierarchy views

General Ledger Hierarchy Views

GL Hierarchy Views allow users to create a view of their financial data within a Pronto Xi screen. Present financial information in a similar structure to your traditional financial reports within a Pronto Xi screen, making it easy to validate figures from your financial reports and reconcile back to source transactions within Pronto Xi.

Out-of-the-box views or design your own

As soon as the GL Hierarchy is populated, you can start using your default P&L View. If non-standard or more complex views are required, you can use the GL Hierarchy View Designer and create a view exactly the way you want it.

View options include:

- A wide range of pre-defined views that mirror your default financial reports
- Bringing in actual to budget, then calculating and displaying the variance
- Having separate columns for different companies, territories or divisions
- Building ratios between the rows so you can see things like cost of sales as a percentage of sales

Drill down to the data you need

Because GL Hierarchy views are built using staged data, drilling up and down through the various levels is instantaneous. The GL Hierarchy View can be set to automatically refresh overnight or users can do it 'on the fly'. Users can also determine how many versions of the snapshot data they want to keep to compare with current data.

Hierarchy views add options to the Pronto Xi reporting

GL Hierarchy Views use the same hierarchies as standard Pronto Xi financial reports, enabling users to validate figures in their financial reports. It's also easy to drill through to the underlying transactions that contribute to the period balances. In addition, the views can be pushed out to excel for further manipulation or presentation.

Other features and benefits

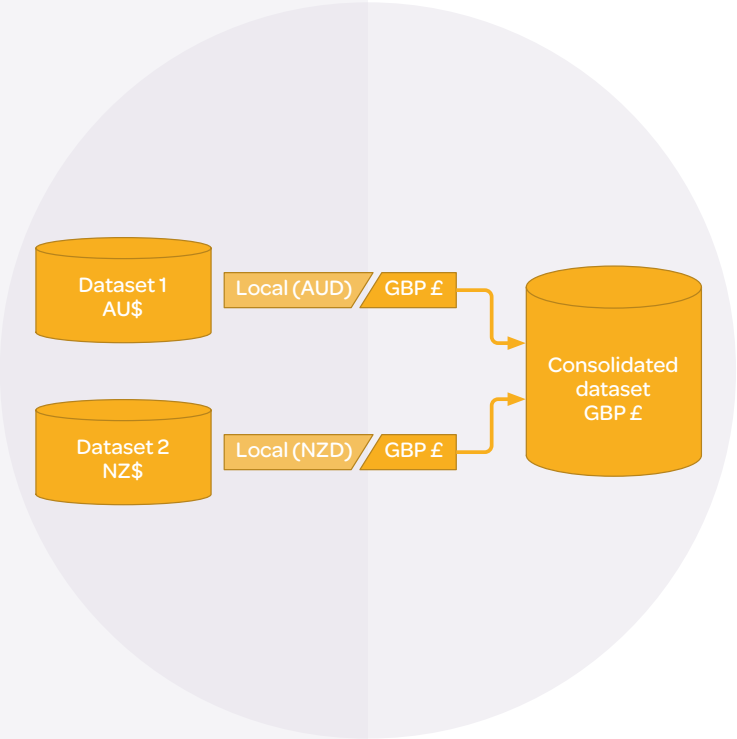
- Views can be personalised for an individual and built into their Pronto Xi menu
- Views obey masking so users will only receive appropriate information
- Very fast performance.

Cash flow forecasting

Cash flow is the lifeblood of business, and being able to accurately model projected cash flow is a fundamental element of managing any business's continued liquidity. Pronto Xi General Ledger facilitates the creation of effective and flexible cash flow projections.

You can choose exactly what will be included in your projections, reflecting assumptions that are specific to your business. This means information that isn't currently available in the underlying database (such as upcoming capital expenditure) can be reflected in cash flow projections.

Designed to work with Pronto Xi Business Intelligence, cash flow reporting leverages the power of Pronto Xi with the simplicity of IBM Cognos, to deliver an outstanding solution.



Multiple Reporting Currencies

Multiple Reporting Currencies (MRC) helps you meet demanding International Financial Reporting Standards (IFRS), which require transactions to be recorded in a local as well as a 'functional' currency. MRC has been designed to allow transactions to be recorded in an unlimited number of functional currencies, providing complete flexibility.

The MRC capability has been extended to the General Ledger, Accounts Receivable and Accounts Payable modules. It also supports the 'temporal method' of translation for fixed assets across each of the functional currencies.

To facilitate compliance with both local and international reporting, MRC assists complex corporate structures to transact and report in a variety of currencies and jurisdictions.

General Ledger Consolidation

With a robust and flexible consolidation engine, General Ledger Consolidation meets the needs of straightforward consolidations through to the most complex corporate structures. In short, it is a flexible, intuitive and powerful tool to assist with all sorts of financial consolidations.

Designed to work with Pronto Xi's Multiple Reporting Currencies, General Ledger Consolidation is ideal for entities with operations in different regions and different local currencies. It is also flexible enough to consolidate datasets with different financial periods and years, regular and irregular periods, and non-uniform charts of accounts.

Foreign currency

Foreign currency transactions are supported in Accounts Receivable, Accounts Payable and Purchasing, with values maintained in foreign currency and the local currency equivalent in the general ledger.

Pronto Xi Foreign Currency can be used to maintain customer and supplier accounts, raise sales and purchase orders, process cash receipts, make cash payments, maintain bank accounts, and transfer funds to and from foreign bank accounts. Currency revaluations of foreign customer and supplier balances can also be performed.

Flexible tax system

Pronto Xi General Ledger has a globally compatible tax architecture to underpin tax reporting. With a low-level, data-driven method of tax setup, it caters for a broad range of international tax regimes and their dynamic compliance requirements.

Tax analysis

There is a range tools to analyse and reconcile tax for reporting purposes.

Tax analysis is presented in a data grid, so you can easily apply filters and export information, as well as identify and isolate the data you need to reconcile tax activities.

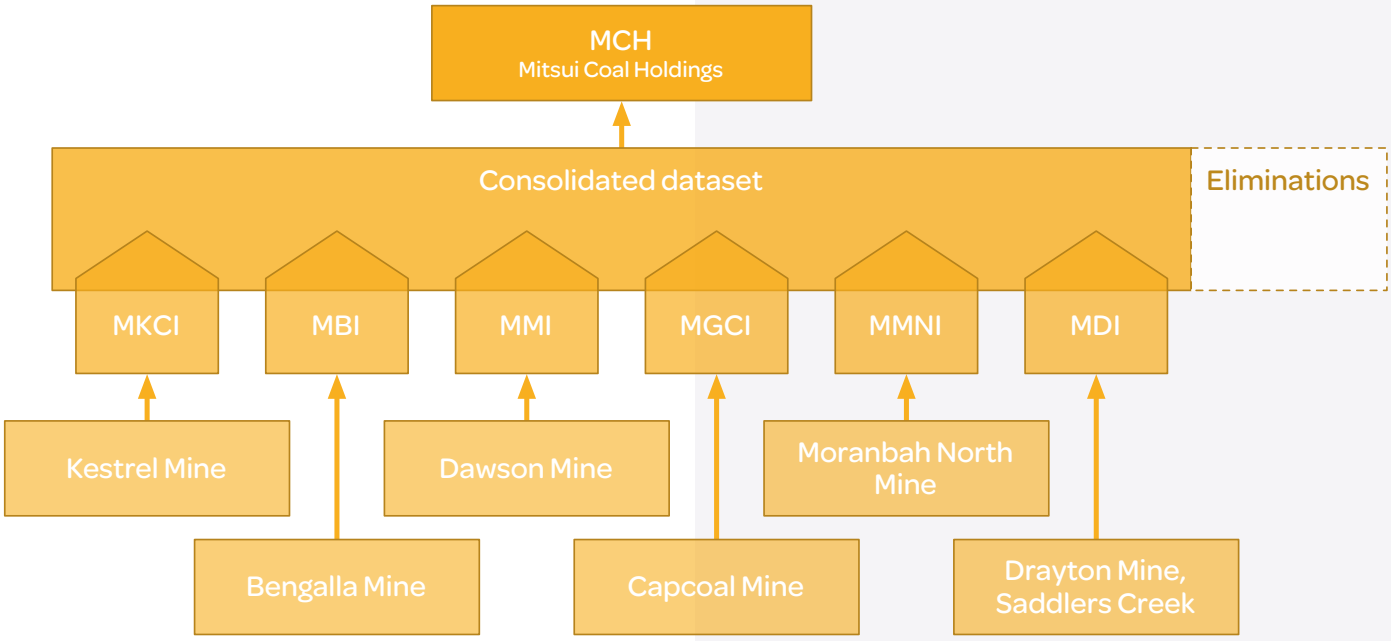
To ensure the integrity of the reporting requirements in the preparation of returns, records are collated into a date-based grouping and marked with a user-defined description to allow multiple work streams to be undertaken without risk of duplicated accounting.

Commitment accounting

By raising a purchase order for an item, you can use commitment accounting to track the value of outstanding orders against a general ledger account. This provides you with better control of expenditure performance against budget, and better information to plan cash flow.

Unearned income

Pronto Xi Service and Rental modules allow you to post unearned income (ie. income earned on a contract that relates to a future accounting period) to a balance sheet holding account and take it up as income in the period to which it applies.



Multi-company environments

Multi-company environments

There are four ways to manage multi-company setups:

- Maintain multiple companies in one data set
- Use separate data sets for each company, and consolidate to a holding company
- Use separate data sets for each company's subsidiary ledger, and share a common general ledger
- Foreign currency consolidation

General Ledger user masking

You can use masking to prevent individual users from viewing selected components of the general ledger. For example, you can restrict access to a specific department, company or region.

Inter-company postings

In a multiple company environment with a single data set or common general ledger, Pronto Xi General Ledger can automatically raise inter-company balancing entries to ensure that each company remains in balance within itself and within the general ledger.

Integration with other Pronto Xi modules

Most Pronto Xi General Ledger transactions are automatically posted from operational transactions processed through other Pronto Xi modules.

The update of the general ledger and subsidiary ledgers is synchronised in real-time and controlled by mapping tables or special accounts.

Mapping tables are simple to set up and allow the customisation of postings based on your organisation's requirements. If the mapping is not fully defined, Pronto Xi uses predefined accounts to avoid operational discontinuity.

Comprehensive audit and tracking tools make compliance easier

An integrated audit will register changes to key data – who, what and when is captured automatically. Tools are provided to view and manage the audit data.

The major transaction processes assign a tracking ID to events – key enquiries provide the ability to drill back or forward through the various sub-ledgers to view related postings.

A sales order can be traced through 'Inventory', 'Customer' or the general ledger and all of its transactions viewed.

Excel import and export

Files can be imported from a spreadsheet or a flat file into the general ledger or other modules such as Pronto Xi Accounts Receivable, Accounts Payable or Inventory – and likewise exported.

Bank statements, cash receipts and other bank information can also be imported.

Financials

- General Ledger & Fixed Assets
- Accounts Receivable
- Accounts Payable
- Resource Management
- Payroll & Employee Portal

Distribution

- Inventory
- Sales
- Purchasing

Sales & Marketing

- Point of Sale
- eCommerce
- Repairs
- CRM
- Mobile Sales & CRM

Supply Chain

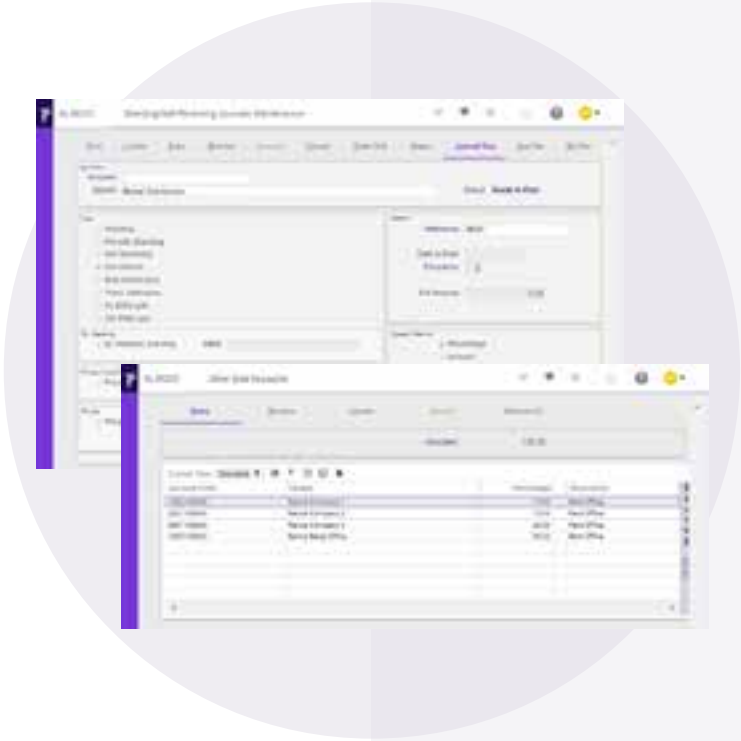
- Warehouse Management System
- Distribution Requirements Planning
- Advanced Forecasting
- Electronic Data Interchange
- Radio Frequency
- Scanpack
- Catalogue

Asset & Facility

- Project
- Service
- Service Scheduler
- Mobile Service
- Service Connect
- Maintenance Management
- Rental

Manufacturing

- Shopfloor
- Planning
- Scheduler
- Laboratory
- Quality Management



Normal and prior period journals

Transactions can be posted directly into the general ledger without affecting any other ledger. Journals are normally posted to the accounting relevant to the transaction date, however they can be posted to an earlier period, or the last period in the previous financial year, by using a prior period journal.

Users with the right access can post transactions to closed periods. These remain identifiable as being posted after closure of the accounting period.

Standing and self-reversing journals

Automatic journals can be set up as templates for general journals that repeat, eliminating repetitive data entry. Recurring journal types include:

Standing journals

to create a batch of entries for posting each month for a nominated number of months.

Distribution journals

to distribute the total period movement of one account across a range of accounts (e.g. allocating costs across cost centres) by percentage or set amount.

Masking journals

to distribute the total period movement of multiple accounts across a range of accounts (e.g. allocating pooled cost centres across other cost centres).

Self-reversing journals

to post in the current period and reverse with a future posting in the next period.

Periodic standing journals

which are similar to standing journals and are used when the amount to be posted changes each month, while the accounts remain static.

General Ledger cash payments

Cash Payments records payments from the bank for sundry expenses. It can also be used to post bank charges and other deductions from the bank account. Cash payments can be made through the general ledger, either via accounts payable or directly from the general ledger, and details of a manually raised cheque can be included in the cheque register for reconciling.

Applicable tax for these payments may also be entered, for inclusion in tax analysis.

Transaction detail history is kept for as long as necessary. In summary mode, Pronto Xi General Ledger holds data by period for an indefinite number of years. Previous years' transactions are archived.

Financial year calendar

Pronto Xi General Ledger uses 12 or 13 user-defined periods. The length of each period is defined by the period start dates. Both regular and irregular periods are supported. Irregular accounting periods are utilised in financial calendars, for example, each month ends on the last Friday or 4/4/5-week period quarters.

Date-based transactions

The date of each transaction determines the period into which it is posted. The year and period number, relative to the financial calendar, is also stamped on each transaction. This feature facilitates reporting and exporting to third-party analytic tools. It also makes it easier to sort/filter transactions by accounting period and year.

End of period and end of year functions

Many of the tasks involved in closing the current period are automatically performed by the Pronto Xi Period End Processing function. At year-end, the profit and loss accounts are closed out to the appropriation accounts, and YTD balances updated. Each of the main ledgers (Accounts Receivable, Accounts Payable, Inventory and General Ledger) can be rolled independently.

Pronto Xi Emissions Tracking

To help improve sustainability, Emissions Tracking is now accessible to every organisation running Pronto Xi Financials.

Emissions Tracking includes capture of activity data, calculation of emissions and presentation of results. It records activity data during normal business operations (business-specific operations can be easily integrated by using infrastructure tools).

Business users can assemble, personalise, analyse and interact with carbon data through a dashboard.

Once an organisation has mobilised management and set emission targets, Pronto Xi Emissions Tracking lets them identify and quantify options, establish a strategy and implement a practical plan to achieve real results.

Pronto Xi Business Intelligence for General Ledger

Pronto Xi includes ready-to-go financial reports for the General Ledger, which include:

- Balance Sheet
- Profit and Loss
- Trial Balance
- Transactions
- Expense Analysis - Summary & Detail
- Projected Cash Flow
- Account Movement Analysis
- Goods Received Not Invoiced (GRNI)
- Statement of Cash Flow

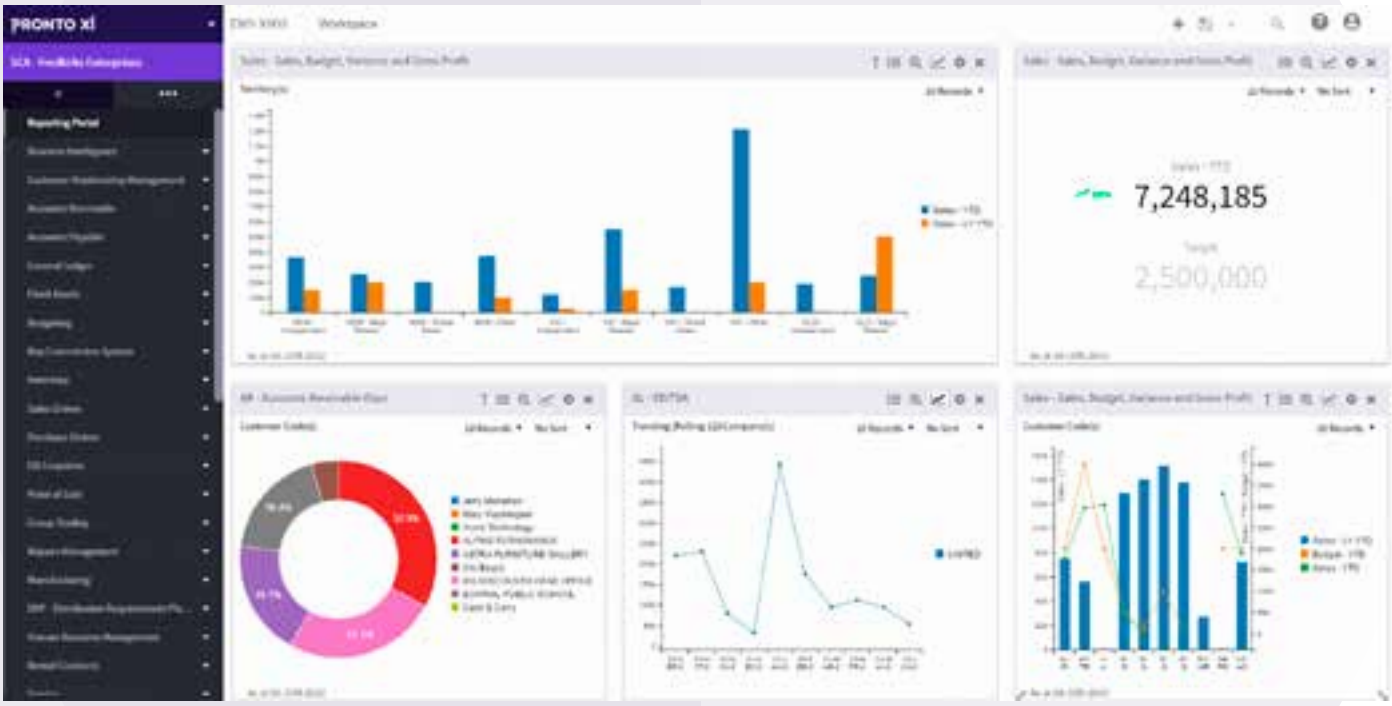
KPI Library General Ledger metrics

Pronto Xi's new KPI Library have a range of pre-configured KPI's that allow you analyse your business and get the insights you need to make effective and informed decisions.

All these metrics can be snapshot providing the ability to analyse trends over time.

These KPI's include:

- Current Ratio
- Quick Ratio
- Cash Ratio
- Working Capital
- Debt/Equity
- Return on Asset
- EBITDA to Sales
- Return on Equity
- Return on Capital Employed
- Revenue
- Cost of Sales (COGS)
- Gross Profit
- Operating Expenses
- EBIT
- EBITDA
- Net Income
- GL Accounts Receivable Values
- GL Accounts Payable Values
- Inventory Value
- GL Cash Value
- GL Investments


PRONTO XI
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Pronto Xi Fixed Assets
Make the most of your assets

Fully manage all your fixed asset transactions, including acquisition, disposal, transfer, depreciation, revaluation and reporting, with Pronto Xi Fixed Assets.

Pronto Xi Fixed Assets module is a dynamic, robust and flexible suite designed to efficiently manage assets all the way from acquisition to disposal. The Fixed Asset suite is perfect for multinational companies dealing with multi-jurisdictional asset management and reporting.

Multiple depreciation regimes for each asset

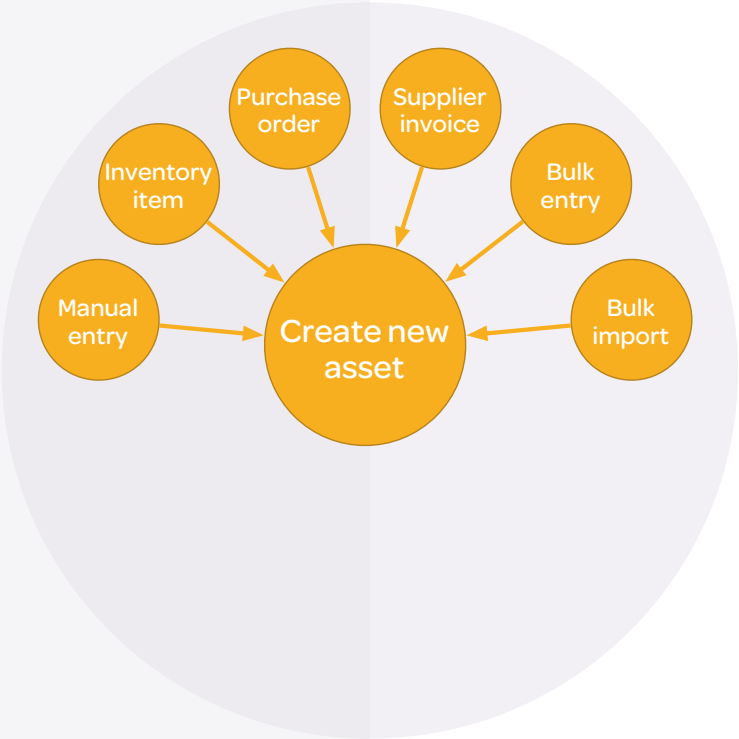
Each regime (e.g., book or tax) can have its own acquisition cost, depreciation method and depreciation rate — as well as retain a full transaction history. Attach unlimited alternative depreciation regimes to each asset.

Efficiency with bulk transactions and interaction with Excel

All the usual tasks associated with managing your fixed assets can be performed on an asset by asset basis or in bulk using the new bulk transaction functionality. Efficiency is further enhanced because these bulk transactions can be easily exported to or imported from Excel.

Other features include:

- post depreciation into next year – even when general ledger hasn't been rolled
- retain full transaction history for book, tax or any other depreciation regime, for as many years as you like
- enter transactions in bulk or on an asset by asset basis
- easily copy and paste from Excel to bulk transaction screens
- set default control accounts and only override the exception
- split depreciation expense across multiple accounts at the asset level
- set depreciation expense posting at an individual asset level
- revalue classes of assets using the new Asset Class field
- set separate user definable calendars against each depreciation regime



Acquisitions

There are five methods of processing an asset acquisition:

Manually

Create the asset profile from within the asset register, which posts amounts to a clearing account in the general ledger.

From inventory

Create an asset from an inventory item, automatically transferring the item from the inventory ledger.

From a purchase order

Create the asset profile while raising the purchase order or post directly to a specific general ledger account, making it easy to keep your asset register updated.

From a supplier's invoice

Create an asset profile while processing a supplier's invoice without the need to raise a purchase order.

Bulk asset entry

Acquire multiple assets In a single screen. This process also allows bulk asset acquisition by importing from Excel, of course the system provides all the necessary validations.

Asset Maintenance

Pronto Xi Fixed Assets uses a unique asset number or label for each asset, which can be manually or automatically generated. Additional numbers or labels can also be entered against an asset to aid identification (e.g. a motor vehicle registration number).

Associated assets may be linked in a parent-child relationship – for example, a 'parent' computer may have a keyboard and screen as 'child' assets.

Asset Maintenance allows you to view additional details (attachments, service maintenance or schedules)

You can also decide how to structure your assets for reporting purposes and easier management.

Fixed Assets interface with General Ledger

Pronto Xi Fixed Assets posts asset transactions directly to the relevant general ledger accounts.

Assets can be assigned to a group/location combination. These groupings allow things like depreciation and revaluation to be performed on a range of assets.

These groupings also determine general ledger posting and allow users to:

- set default control accounts and only override the exception
- split depreciation expense across multiple accounts
- set depreciation expense posting at an individual asset level

Improvements and revaluations

Use Pronto Xi Fixed Assets to record improvements to an asset. The improvement is an integral part of the asset – added to the book capital cost and included in the depreciable cost of the asset.

Pronto Xi also allows asset revaluations. The amount of the revaluation is offset to a general ledger account specified in the interface record and allows subsequent revaluations to be handled in accordance with the relevant standards.

Asset registration expiry date

The Asset Vehicle Maintenance screen tracks the vehicle's registration expiry, allowing Pronto Xi Alert Intelligence to notify users of impending expiry dates across relevant assets.

Asset usage bulk update

Assets can be grouped to simplify usage depreciation. For example, you can enter a figure for units consumed and apply it to an asset group. All assets in the group will be automatically updated with the new data.

Depreciation

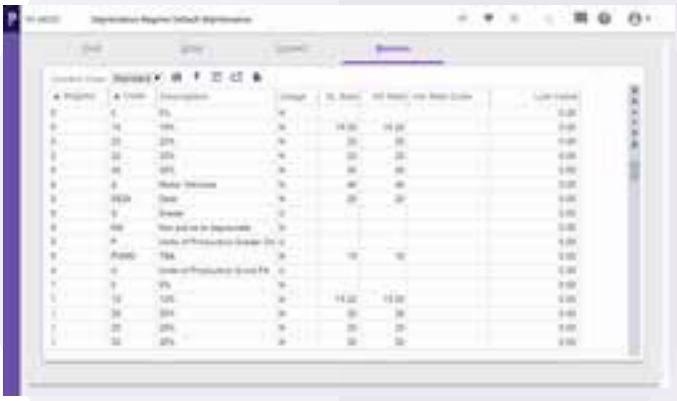
There are four depreciation methods: straight line, diminishing value, units of use and variable depreciation.

Traditionally each asset has had book depreciation and tax depreciation, now users can have as many additional depreciation regimes as they like. Each regime can have a different depreciation method and rate. Each depreciation regime can be adjusted independently and each retains a full transaction history.

Where diminishing value depreciation is used, the amount of depreciation for each period can be weighted by applying spread factors

The variable depreciation can be used to meet the Modified Accelerated Cost Recovery System (MACRS) accounting requirements in the United States. The variable depreciation can also be used to assist with low-value pooling under Australian tax rules.

A detailed depreciation schedule can be reviewed before depreciation is posted and the asset register and general ledger are updated.



Disposals

Assets can be depreciated either individually or in bulk. When disposing of an asset, Pronto Xi Fixed Assets can calculate book depreciation up to the disposal date or for the full year in the year of disposal.

Once the disposal has been posted, no further transactions may be processed against the asset.

Balancing charges can be processed to allow a tax profit on disposal of an asset to be apportioned against the cost of a replacement asset.

Pronto Xi Business Intelligence for Fixed Assets

Pronto Xi delivers a complete set of ready-to-go operational reports for finance and accounts staff to help run the day to day operation of their as well as provide real-time insight into its performance. Operational reports are provided with in-built filters and summary headers meaning users also have greater control and selection of the information that is reported.

Operational reports provided out of the box include:

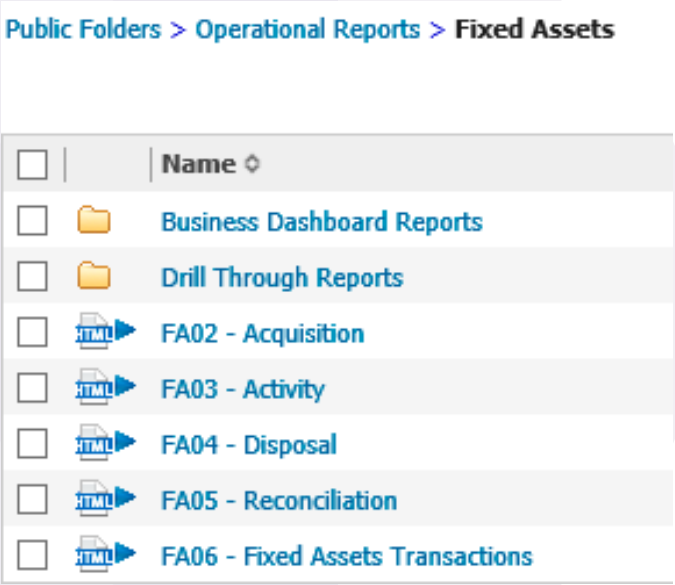
Acquisition
Displays values of all fixed assets by selected acquisition date. This report can also be used for reconciliation purposes.

Activity
View movements in value for any asset transacted between selected dates. Can also be used for reconciliation to GL accounts.

Disposal
Displays values of disposed assets by selected acquisition and/or disposal date ranges, including capital gain or loss on disposal.

Reconciliation
Allows Fixed Assets to be reconciled to the GL for a selected GL period.

Fixed Assets Transactions
View selected transactions by asset and transaction date, for reconciliation, investigation and data verification.



More features

Recording options:

- Asset history recording
- Recording of finance, land/property and motor vehicle details
- Maintenance of service history
- Expense recording
- Revenue recording for rental assets

Pronto Xi Accounts Receivable
Know what's coming to you

Fully integrated with Pronto Xi General Ledger and Sales, Pronto Xi Accounts Receivable automatically processes all sales transactions to Accounts Receivable with real-time postings to the general ledger.

Pronto Xi Accounts Receivable features include:

- Ageing by 7-day, 14-day, monthly or user-defined categories
- Flexible invoicing, tax options and charges
- Powerful sales analysis: enquiries, reports and budgeting
- Comprehensive cash receipting for both local and foreign values
- Automatic or manual cash allocation and full banking slips
- Part payments, retentions and credit claims
- Foreign currency, including loss/gain handling
- Support for foreign currency customer accounts
- Extensive bank reconciliation functionality
- Debt ageing, analysis and credit management
- Head office and branch accounts

Customer Maintenance

Customer Maintenance provides centralised control of your customer data, for operational efficiency and sound financial management.

Customer information is captured and used as default data in Pronto Xi Accounts Receivable and other modules. You can maintain very detailed information about your customers, including contacts, email addresses, banking information, currency, licensing details, warranty administration, multiple delivery addresses, delivery instructions and much more.

Ship to and bill to

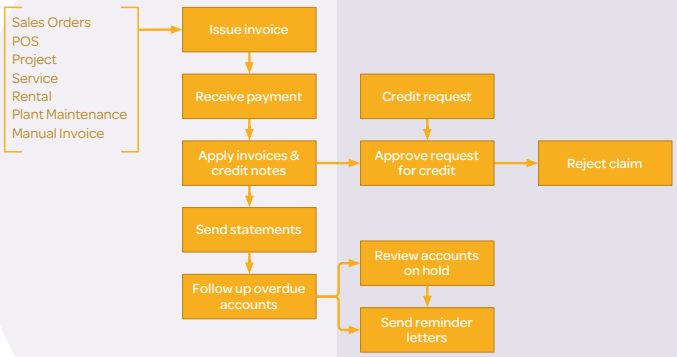
You can use Pronto Xi Accounts Receivable to set up and maintain head office and branch accounts. Sales may be held against, and shipped to, a branch account, while being billed to a head office account. You can define special pricing for the head office account, or for branch accounts.

Credit limit

Credit limits can be defined for each customer. New orders over the limit automatically go on credit hold. Orders on hold can only be released by an authorised credit officer.

A customer's credit can also be controlled by the age of outstanding invoices. For example, if the customer is under the specified credit limit but has unpaid accounts greater than 60 days, new orders can automatically be placed on credit hold.

Accounts can be placed on credit hold by changing the status to 'No Supply'. Additional holds can be placed on sales orders if the gross margin of the order is below a defined percentage.



Settlement discount

You can define a settlement discount for each customer. A user-defined table sets out the percentage discount allowed based on the number of days from the invoice date, number of days from the end of month, or on a specified cut-off date.

Security functions

Pronto Xi Accounts Receivable can mask users so they only have access to customers in specified territories. For example, you can give a state manager access to all territories, but limit the sales representatives to their respective territories.

More customer information

Default sales order information such as despatch warehouse, sales representative, territory, applicable tax and price level is defined by the customer master file. You can override these data during sales order entry. The defaults also define the reporting structure.

Additionally, the customer master file captures all the customer preferences or rules, such as:

- Send invoice with goods
- No statement required
- Purchase order required
- Charge interest on overdue accounts
- Allow part shipments
- Backorder handling instructions
- Backorder release priority
- Customised layouts for invoices, statements, etc

Full enquiry functions

As well as viewing the full details of the customer master file and current transactions, you can interrogate the customer's file for ageing analysis, product sales history, sales orders, outstanding invoices, current inventory exposure, historical transactions, licenses or permits, complaints, delivery addresses, instructions etc.

Pronto Xi allows immediate access to current and historical sales orders and transactions through enquiry screens and reports.

Account conversions

You can change a customer's account code, which is useful if the account code is based on a name which changes. If a customer's business is taken over by another customer, you can merge the accounts.

All customers of a sales representative can be transferred to another representative, or all customers of one territory can be transferred to another territory.

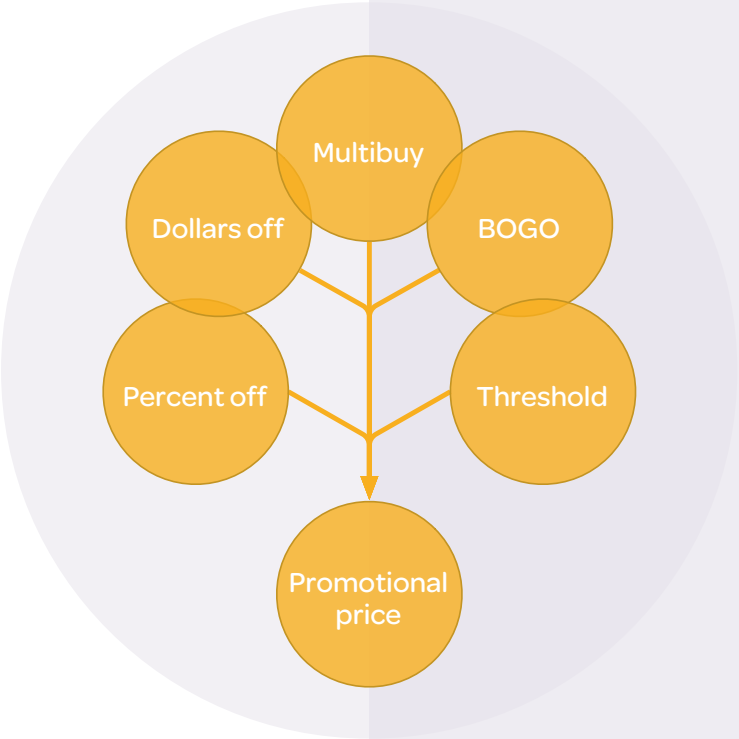
Customer pricing, discounts, promotions and rebates

Pronto Xi pricing structures can be adapted for each customer account or bill-to. The sell price is determined by a combination of customer and item attributes such as pricing levels, contract, territory, warehouse, customer group, product class, product type and item group.

The same flexibility is available for discounts, promotions and rebates.

Maintain your budgets and forecasts

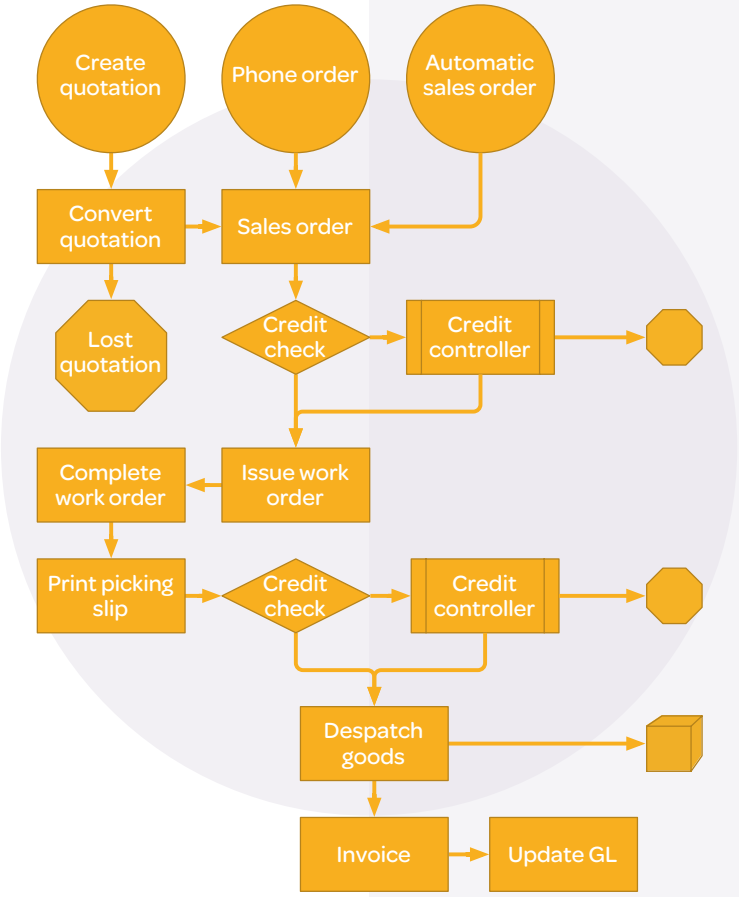
Configurable budgets allows users to create sales based budgets using any combination of attributes on the customer or inventory master records. The budgets can be created either daily, weekly or per period and based on a range of measures including: value, quantity, gross profit, gross profit % and quantity.

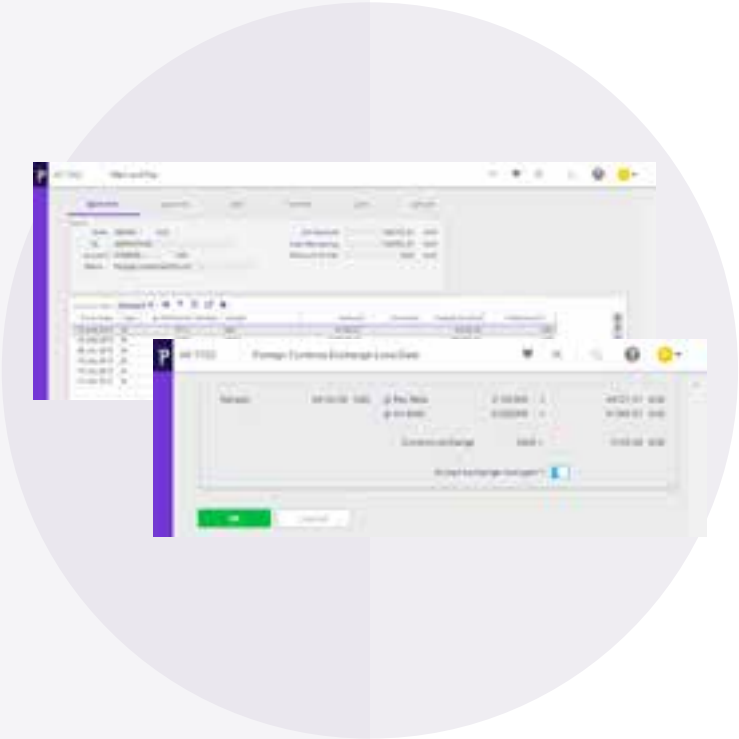


Invoices and credit notes

Pronto Xi Accounts Receivable can simplify straightforward sales order processing. For example, if you can take an order, create an invoice and post it to the customer, inventory items do not need to be created – instead, you can use a special descriptive line to record the sales information.

Where you are invoicing a customer for a non-stock item (e.g. recovery of expenses or miscellaneous revenue), the manual invoice is allocated to the appropriate general ledger account or accounts.





Cash receipting

There are a variety of allocation methods for cash receipts: they can be automatically or manually marked off against invoices; you can use one receipt to pay invoices from more than one customer account; or you can leave a receipt unallocated and mark it off against another invoice at a future date.

Pronto Xi Accounts Receivable allows the processing of foreign currency values, including associated bank charges. Any exchange gain or loss associated with the transaction is automatically calculated and posted.

Based on a user-defined global tolerance, any short payments can be automatically written off to a predefined general ledger account.

Similarly, processes are in place for dishonoured cheques and the automatic write-back of related transactions. Bank charges may be taken up in the general ledger or charged back to the customer, and a bank audit report produced. You can also print and reprint bank deposit (pay-in) slips.

Customer receipting, matching to invoices and other transactions can also be undertaken in the bank reconciliation programs.

Accounts Receivable journals

Pronto Xi Accounts Receivable supports the transfer of transactions via journal from one customer account to another. If you are using multiple control accounts, these transactions are only reflected in the general ledger if they represent activity in different control accounts. The net overall value of the accounts receivable ledger is not changed for these journals.

When a company is both a customer and a supplier, values held against the customer account may have contra transactions posted against the supplier account.

Specific transactions can be written off as bad debts when required, with automatic adjustments of consumer taxes.

Customer general ledger journals allow direct allocation of general ledger amounts to customers. This function is typically used for recharge of expenses.

End of Periods

A process to manage period-end rollovers minimises downtime and offline maintenance. This is particularly important for businesses operating in a 24/7 environment.

Each sub-ledger record has a period flag, allowing for a record-by-record period roll. It negates the need to log users out during the period rollover. A status screen provides detailed information on the rollover progress.

Special sales features

A number of features for specialised industries and sales order processing are available, including:

- Licenses or permits to purchase certain products (e.g. tobacco or liquor)
- Printing a customer's item number on the invoice if their item number is different from yours
- Allowing only specified customers to buy certain products (e.g. if you have exclusivity arrangements)
- Customer partial shipment policy – indicates whether or not a customer accepts backorders and how these backorders are handled
- Different form layouts where required by customers (e.g. invoices or statements)
- Order surcharge (fixed percentage or dollar amount for orders below minimum value)
- Mandatory input of customer purchase order number (reference) in order entry
- Defining a 'use by date' (minimum acceptable shelf-life of a product)

Admin/credit officer function

Credit officers may be responsible for debt collection, as well as controlling the level of credit to be extended to individual customers. The credit officer can place a customer on 'No Supply' until the customer pays their account, and subsequently override the 'No Supply' flag to release all or specific suspended orders.

The credit officer functions of Pronto Xi Accounts Receivable include sending overdue letters to customers and charging interest on overdue accounts.

Orders that exceed credit limits for a customer can automatically be placed on hold until a credit officer releases them. Each credit officer has value limits to control the amount they are able to release for a customer, and the value of individual credit notes they can authorise.

Sales representative commissions

Commissions to sales representatives, including bonuses and penalties, can be paid based on sliding scales. Special commission rates can also be set for specific item groups, with up to five sales commission breaks.

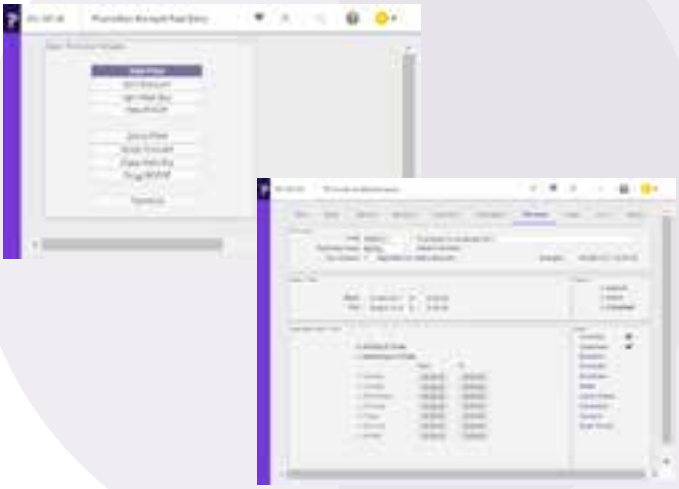
Bonuses and penalties can be used to encourage sales representatives to collect on outstanding debts and discourage them from offering discounts to customers.

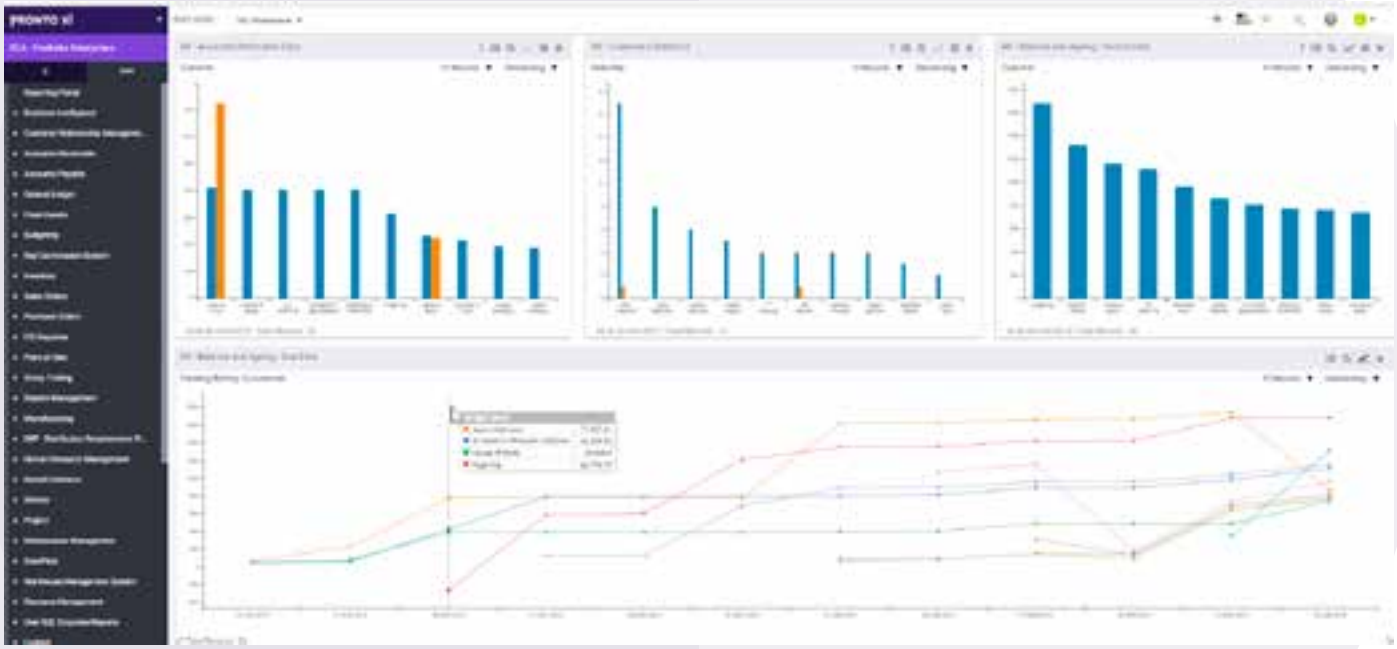
Retail Promotions

Retail Promotions is a feature of Pronto Xi Accounts Receivable that helps you manage and track promotions, related expenses and claims in dealing with retailers. Promotion history is captured at the transaction level for full reporting and powerful summary analysis.

The functionality of Retail Promotions includes:

- User-defined promotions and expenses (e.g. deferred or off invoice)
- Integration with Pronto Xi Sales, General Ledger and Customer Rebates
- Accrual of deferred expenses and rebates in Pronto Xi General Ledger, and review of these against the promotion and customer
- Options for how the promotion affects sales history and cost of goods sold
- Promotion status – active, on-hold, closed etc.
- Promotion start and end date
- Promotions established by customer and product, or customer and item group
- Use of rebate rules




PRONTO Xi

Pronto Xi Business Intelligence for Accounts Receivable

Pronto Xi delivers a complete set of ready-to-go operational reports and business dashboards for finance and accounts staff to help run the day to day operation of the Accounts Receivable function as well as provide real-time insight into its performance. Operational reports are provided with in-built filters and summary headers meaning users also have greater control and selection of the information that is reported.

The KPI Library provides a wealth of important metrics allowing you to analyse and understand all aspects of your AR function. Importantly this data can be trended over time so you can analyse trends and proactively manage operations.

This information can viewed via Cognos or Pronto Xi Workspaces.

Operational reports included as standard:

Aged Trial Balance

Designed to display, per customer, the transactional values in historical ageing buckets by invoice or due date. When run as a summary, the report displays a value for each bucket with a percentage of the total. Users can drill on each bucket's value for any given customer to see a detailed view of that data.

Customer Transactions

View transactions by customer, by transaction date to allow reconciliation and issue investigation or for data verification purposes.

KPI Library Accounts Receivable metrics

Pronto Xi's new KPI Library have a range of pre-configured KPI's that allow you analyse your business and get the insights you need to make effective and informed decisions.

All these metrics can be snapshot providing the ability to analyse trends over time.

These Accounts Receivable KPI's include:

- Balance and Ageing by Invoice Date
- Balance and Ageing by Due Date
- Customer Statistics
- New and Closed Customers
- Invoices – Value/Count
- Accounts Receivable Days
- Customer Zero Sales

Pronto Xi Accounts Payable
Manage debt, minimise liability

Pronto Xi Accounts Payable allows you to drill down into your supplier accounts, giving you a full view of supplier arrangements, transactions and approval levels.

Fully integrated with Pronto Xi General Ledger and Purchasing, Pronto Xi Accounts Payable features include:

- Separate purchase and pay-to accounts
- Customised cheque and remittance generation
- Automated payments processing by cheque, EFT and other formats
- Full purchase/payment history
- Multi-currency support (foreign and local bank accounts)
- Withholding Tax PAYG/1099
- Bank reconciliation for multiple banks
- Current and forward commitment tracking
- Recharging expenses back to customer account
- Easy purchase order, invoice and shipment matching

Supplier master

You can maintain detailed information about your suppliers with the supplier maintenance screen. This information is used as default data in all other modules, giving you central control over your supplier data for increased operational efficiency and sound financial management.

Supplier enquiries

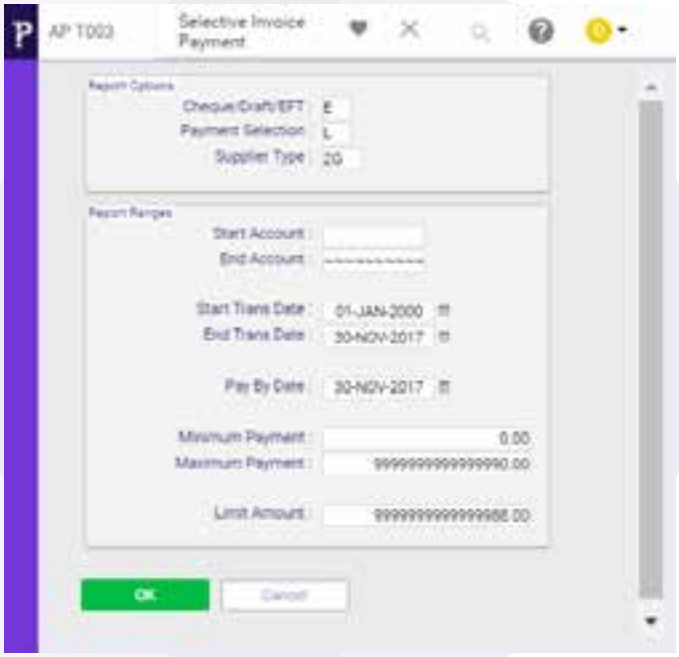
Pronto Xi Accounts Payable supports a range of enquiries and analysis, including:

- Full transaction history
- Ageing analysis
- Commitment analysis
- Supplier and transaction notes
- Purchase order details and general ledger transactions
- Foreign and local invoice amounts
- Outstanding purchase orders

Supplier Type

Pronto Xi Accounts Payable uses the 'Supplier Type' field, which holds a user-definable code, to group suppliers into categories such as 'General', 'Contractor' or 'Trade'.

'Supplier Type' can be used to split accounts payable control accounts within the general ledger, while payment runs or user access can also be limited to particular accounts. This field is also a selection criterion for most accounts payable reports.



Easy options for payments

Pronto Xi Accounts Payable is easy to use and creates many options for payments:

- Draw a payment manually and enter its details against the supplier account or direct to a general ledger account, in local or foreign currencies
- Draw from foreign bank accounts and use a variety of currencies
- Automatically create a single payment
- Build, review and refine a file based on suppliers, minimum/maximum amounts, due dates and other selection criteria
- Automatically perform payment runs by selecting ranges of suppliers, due dates, amount limits and more

Pay-to account

Purchase goods from one supplier, but specify that the invoice should be paid to a different supplier account (ie. for head office/branch accounts).

This type of transaction can be set up using a supplier's 'pay-to' account to specify the parent account for payment. When using this functionality, the purchase history is stored against the branch account, while the amount owed is held against the head office or pay-to account.

Payment terms

Pronto Xi Accounts Payable uses smart payment terms to calculate due dates for invoices. Options include the number of days from the invoice date or from the end of the month, or a specified cut-off date.

During invoice entry, the system automatically calculate the invoice due date based on the payment terms assigned to the supplier. This due date can be manually changed at any time before the invoice is paid.

Payment type

Pronto Xi Accounts Payable allows you to determine how a supplier is paid – by cheque, draft, Electronic Funds Transfer (EFT) or letter of credit.

Settlement discount code

You can automate the processing of discounts given by suppliers to encourage faster settlements, using the discount terms offered by each supplier.

Payment selection

A payment selection flag allows you to select suppliers for payment runs or reports. Suppliers are designated as:

- Local
- Foreign
- A priority code between 1 and 9
- A selection code between A and Z

Priority payment levels can be assigned to certain suppliers so that, for example, those that need to be paid promptly are given the highest priority.

Default General Ledger account

To simplify the processing of invoices, each supplier can be assigned a Default General Ledger account. For example, invoices from the local service station may default to a particular motor vehicle expense account.

Invoice transactions

Pronto Xi Accounts Payable incorporates a variety of invoice and credit note options, such as purchase order invoice, purchase return, credit note, shipment extra charge invoice, non-purchase-order invoice, asset invoice and recharge invoice. Each transaction can be processed in local or foreign currency.

For all invoice types, you can specify whether the sales order lines are consolidated or printed as individual lines.

Purchase order invoice

Invoices are linked to purchase orders. If the system identifies a variance, it must be accounted for during invoice entry. The system can be tailored to handle variances in a number of ways.

All invoices can be authorised for payment, regardless of the purchase order variance. The costing of authorised variances is automatically sent back to inventory, a project or a general ledger code.

Purchase return

If goods on a purchase order are returned when the invoice has been processed and not paid, the authorised payment amount will automatically be reduced by the value of the return.

Shipment extra charge invoice

These invoices link costs to shipments. Accounts Payable automates the costing of these charges across the shipment's inventory.

Non-purchase-order invoice

For invoices where a purchase-order is not raised, the invoice itself is directly allocated to a general ledger codes. This is typically done for utility invoices, telephone accounts and other indirect costs.

Asset invoice

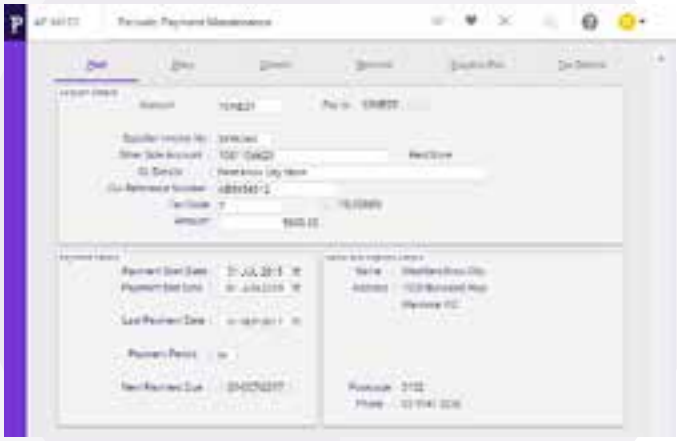
Asset invoices allow accounts payable staff to create a fixed asset record within Pronto Xi Fixed Assets. The person managing the asset register can then add more information, such as depreciation rates.

Recharge invoicing

Recharge invoicing allows a supplier's invoice to be recharged directly to a customer.

Consumer taxes

Taxes are automatically calculated, however this can be over-ridden if the calculated amounts are different to the invoice's tax amounts.



Invoice authorisation tracking

An approval and authority process can be configured to accurately track a supplier's invoice from the moment it is received, allowing you to see its status at any time and identify where delays are occurring or have occurred.

You can use invoice approval and payment approval both simultaneously or independently. You can also specify the approval conditions depending on the type of goods supplied, the value of the goods or even the supplier.

Periodic payments

Pronto Xi Accounts Payable can be set up to automatically process invoices for supplier accounts that need to be paid periodically, such as leases and insurances. Only those invoices that have a 'Next Run Date' equal to or less than the specified date will be processed.

The value and date of any periodic payment can be amended as required.

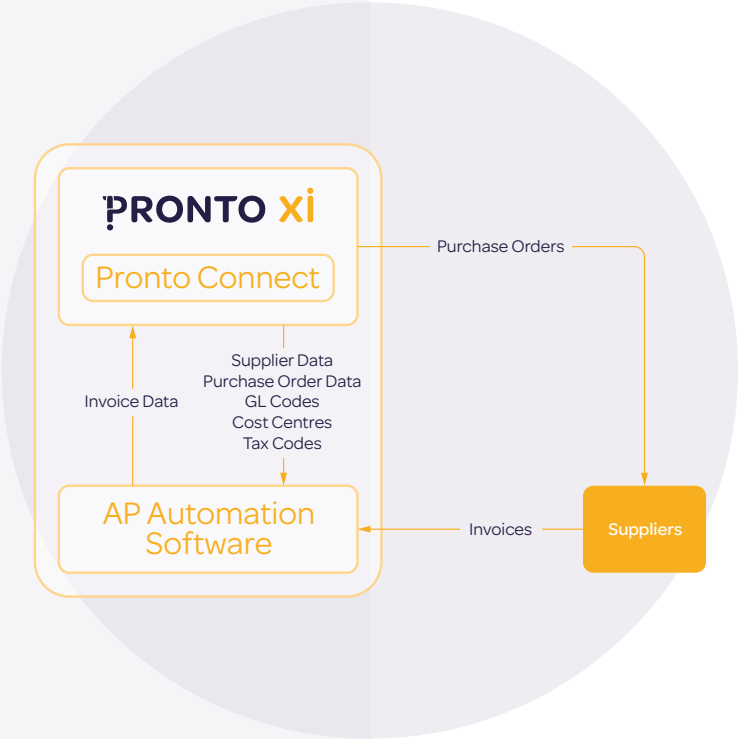
Current and forward commitments

The Payment Commitment by Supplier Report will keep you abreast of amounts that will become due in the coming months. Calculations are based on the value of purchase orders and shipments within the system that have not yet been invoiced.

Payments

There are four main methods available to pay supplier accounts, and payments may be made against local or foreign banks:

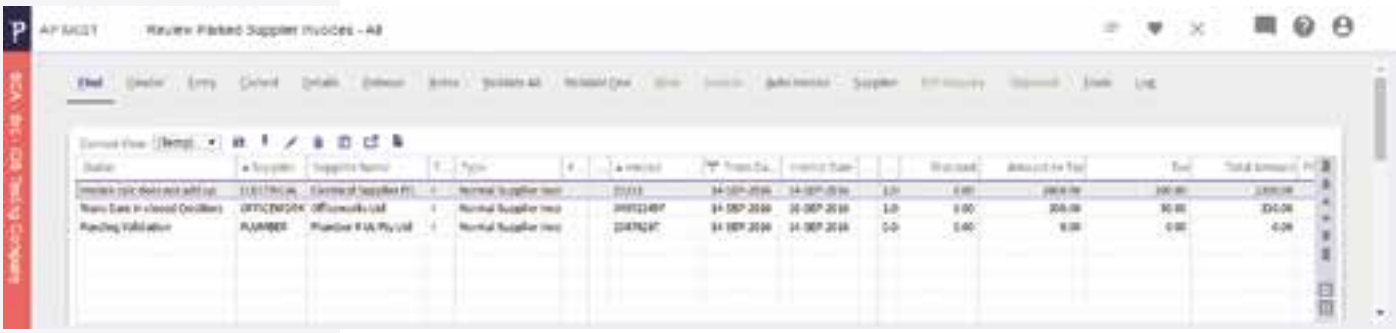
1. Draw a payment manually and enter its details against the supplier account
   Any supplier invoice can be paid manually. If the payment was made in a foreign currency, bank charges and any exchange gain or loss (depending on currency fluctuations) will be posted to the general ledger.
2. Have payments automatically generated in a payment run
   There is a great deal of flexibility in how and when payment runs can be automated for individual suppliers and groups of suppliers. Prior to completing the payment run, the user can reject payments, change due dates or part pay an invoice. Automatic payment options accommodate EFT payment, cheque printing or even a customised file for payment by a third party. Remittance advices may be printed as part of any payment run. Payment processing can be restricted to authorised personnel, and the payment register is automatically updated on completion.
3. Build a review file to fine-tune and selectively release payments
   Multiple criteria can be used to build a file of supplier transactions. This can then be reviewed and refined using 'Mark' and 'Un-mark' for individual or multiple transactions. Listings of the currently selected transactions and suppliers may be produced at any time during the review process. On completion of the review, payments can be automatically created and processed in the same manner as the Automatic Payment function.
4. Use a letter of credit
   You can raise a letter of credit, record drawings against a letter of credit and maintain letter of credit details.



AP Automation integration

It is now easy to integrate third-party Accounts Payable (AP) automation solutions with Pronto Xi via a suite of APIs. You can reap the productivity and cost benefits of scanning and then processing supplier invoices electronically.

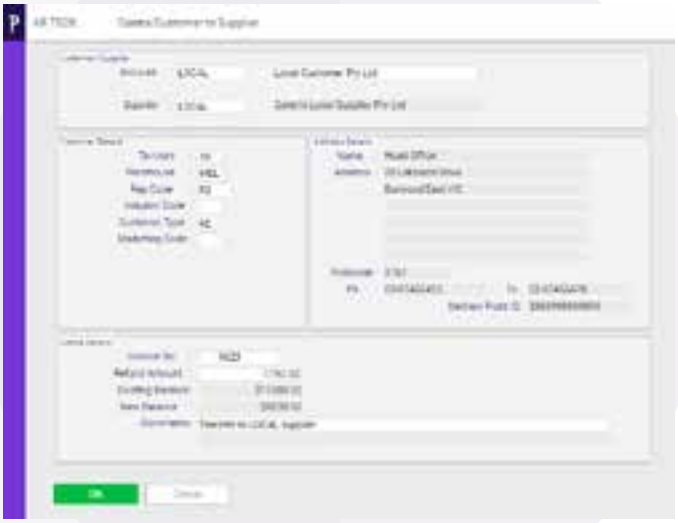
If any supplier invoices cannot be reconciled automatically, they are displayed so that they can be reviewed and validated before being posted to the sub-ledger and General Ledger.



Supplier journals

Inter-supplier journals can be used to transfer transactions from one supplier account to another. If you are using multiple accounts payable control accounts, these transactions are only reflected in the general ledger if they represent activity in different control accounts.

Supplier journals allow transactions to be entered directly between a supplier account and a nominated general ledger account. Pronto Xi also supports contra journals between accounts payable and accounts receivable accounts where a supplier is also a customer.

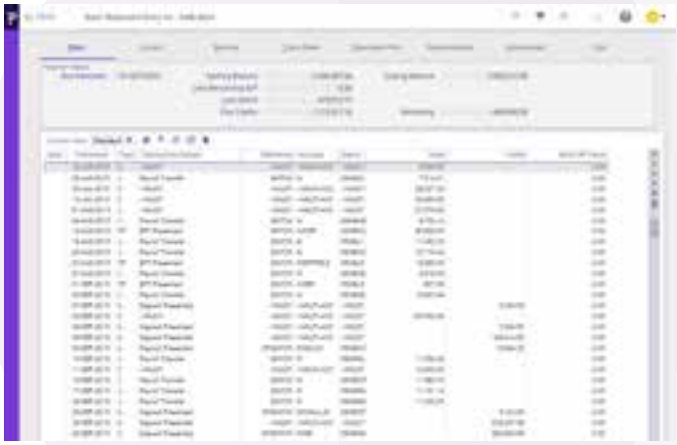


Transaction history

At month-end, all invoices that have been paid in full are transferred to an archive file. Transactions in the archive are fully accessible from standard enquiries and reports.

Account conversions

It is easy to change a supplier's account code. This is useful if the account code is based on a name which changes. Similarly, if a supplier's business is taken over by another supplier, you can merge the two accounts.



Bank statement entries and reconciliation

Pronto Xi Accounts Payable allows you to print payment registers by bank, showing presented payments, un-presented payments, or both. The register allows for maintenance requirements and will always display the current status of the payment.

Bank statement details, including electronic transfers, deposits and various bank and government charges, can be entered manually, or alternatively you can download bank statements directly from the bank and edit them as required.


PRONTO Xi
Ok, time to create your widget

Pronto Xi Business Intelligence for Accounts Payable

Pronto Xi delivers a complete set of ready-to-go operational reports and business dashboards for finance and accounts staff to help run the day to day operation of the Accounts Payable function as well as provide real-time insight into its performance. Operational reports are provided with in-built filters and summary headers meaning users also have greater control and selection of the information that is reported.

The KPI Library provides a wealth of important metrics allowing you to analyse and understand all aspects of your AP function. Importantly this data can be trended over time so you can analyse trends and proactively manage operations.

This information can viewed via Cognos or Pronto Xi Workspaces.

Operational reports out of the box include:

Aged Trial Balance

Designed to display, per customer, the transactional values in historical ageing buckets by invoice or due date. When run as a summary, the report displays a value for each bucket with a percentage of the total. Users can drill on each bucket's value for any given customer to see a detailed view of that data.

Supplier Transactions

View transactions by supplier, by transaction date to allow reconciliation and issue investigation or for data verification purposes.

Payment Commitments by Supplier

Forecast future payable amounts based upon due date to assist cash flow forecasting.

Foreign Currency Exposure

Provides details of foreign currency that is owed by supplier and invoice.

KPI Library Accounts Payable metrics

Pronto Xi's new KPI Library have a range of pre-configured KPI's that allow you analyse your business and get the insights you need to make effective and informed decisions.

All these metrics can be snapshot providing the ability to analyse trends over time.

These Accounts Payable KPI's include:

- Balance and Ageing by Invoice Date
- Balance and Ageing by Due Date
- Supplier Statistics
- New Suppliers
- Invoices – Value/Count
- Accounts Payable Days

Pronto Xi Resource Management
Maximise your greatest assets

Make sure you have the right people in the right place at the right time with the right equipment.

Resource Management is a significant new module in Pronto Xi 740. Resources Management allows businesses to plan and manage both human and non-human (asset) resources in a single module.

Where the resource is a human there will be a link between an employee master and a resource master. Resource Management has additional features and functionality which will be available only to employees linked to a resource.

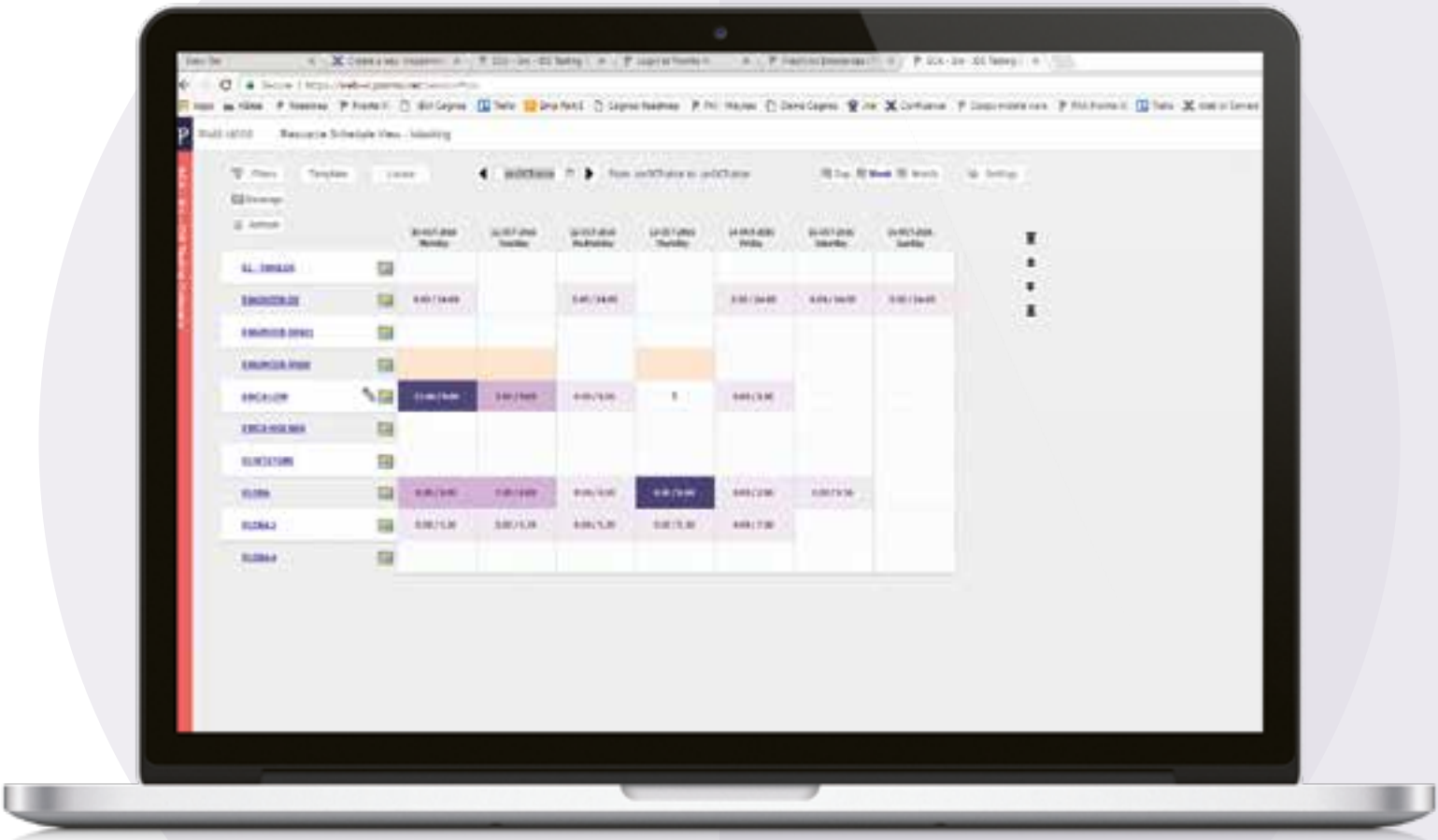
This new functionality within Resource Management that affects employees includes:

- Time Based Timesheets
- Basic Awards
- Rostering

Resource Management allows businesses to plan and manage their work requirements across large groups of human and non-human resources within a single central module.

Link Resource Master Records to other data such as Employees, Engineers, Suppliers, Assets or Serial items to manage resources within the centralised Resource Schedule view. Identify any over - or under- utilisation of resources with ease and use the screen to facilitate any re-allocations.

Benefit from more efficient work allocation to Project Tasks or Service Calls with user-defined Resource Attributes, like skill codes or position details. Invoke attribute filters to isolate the most appropriate resource for the job.



Rosters, awards and Resource Management timesheets

Underpinning Resource Management is a thorough work roster and employee award system.

Set up work cycles so you understand when people are available and expected to works. Resource Management allows you to determine who has the right qualifications or competencies and also what physical locations/s they are available to work.

Rosters can then be created to ensure your operations are fully resources but the right people at the right time.

Budgets can be set for each roster and compared to actual rostered costs to ensure you have full visibility and control.

Timesheets can be entered using total hours or start/stop times. These hours are then translated using Pronto Xi's integrated awards interpreter, ensuring everyone gets paid exactly what they are owed. Pronto Xi awards are user defined and flexible enough to handle the most demanding employment conditions.

Awards apply automatically to timesheets entered by staff, with normal and overtime hours apportioned in accordance with the award definition. Award-specific allowances are also taken into account to ensure employees are compensated appropriately.

Pronto Xi Payroll
Role control

Designed specifically for Australian organisations, Pronto Xi Payroll makes managing employee wages, entitlements, payments and accruals straightforward.

Pronto Xi's fully integrated Payroll module gives you control over employee pay requirements and the flexibility needed to manage multiple pay frequencies.

Numerous allowances and deductions can be created, along with leave types, lump sum payments and salary sacrifice deductions. Overtime payments and shift penalties are easily handled by multiplying the normal pay rate and a scaling factor.

The hours worked by an employee can be defined as a permanent transaction, entered on an ad hoc basis each pay run, or recorded using timesheets. Employees with payment frequencies from weekly to monthly can be paid in a single pay run.

Pronto Xi Payroll calculates and deducts the correct amount of income tax from each employee's pay according to a tax rate table, which can be updated if tax law changes. Provision is also made for before-tax and after-tax additions and deductions, as well as tax adjustments.

Personal leave, annual leave, long service leave and rostered days off are automatically accrued according to awards or individual requirements.

There is a high degree of flexibility in defining leave conditions. You can differentiate between accrued and entitled leave, and set different accrual rates before and after a prescribed qualifying period. Transactions can be posted in any pay run representing leave taken, leave loading or payments in lieu of leave.

Leave conditions can be defined with great flexibility. You can differentiate between accrued and entitled leave, and set different accrual rates before and after a qualifying period. Transactions representing leave taken, leave loading or payments in lieu of leave can be posted in any pay run.

You can maintain separate general ledger accounts, which are automatically posted, for salary and wages, leave payments, and provisions for leave and superannuation.

Pronto Xi Payroll handles Electronic Funds Transfer payments.

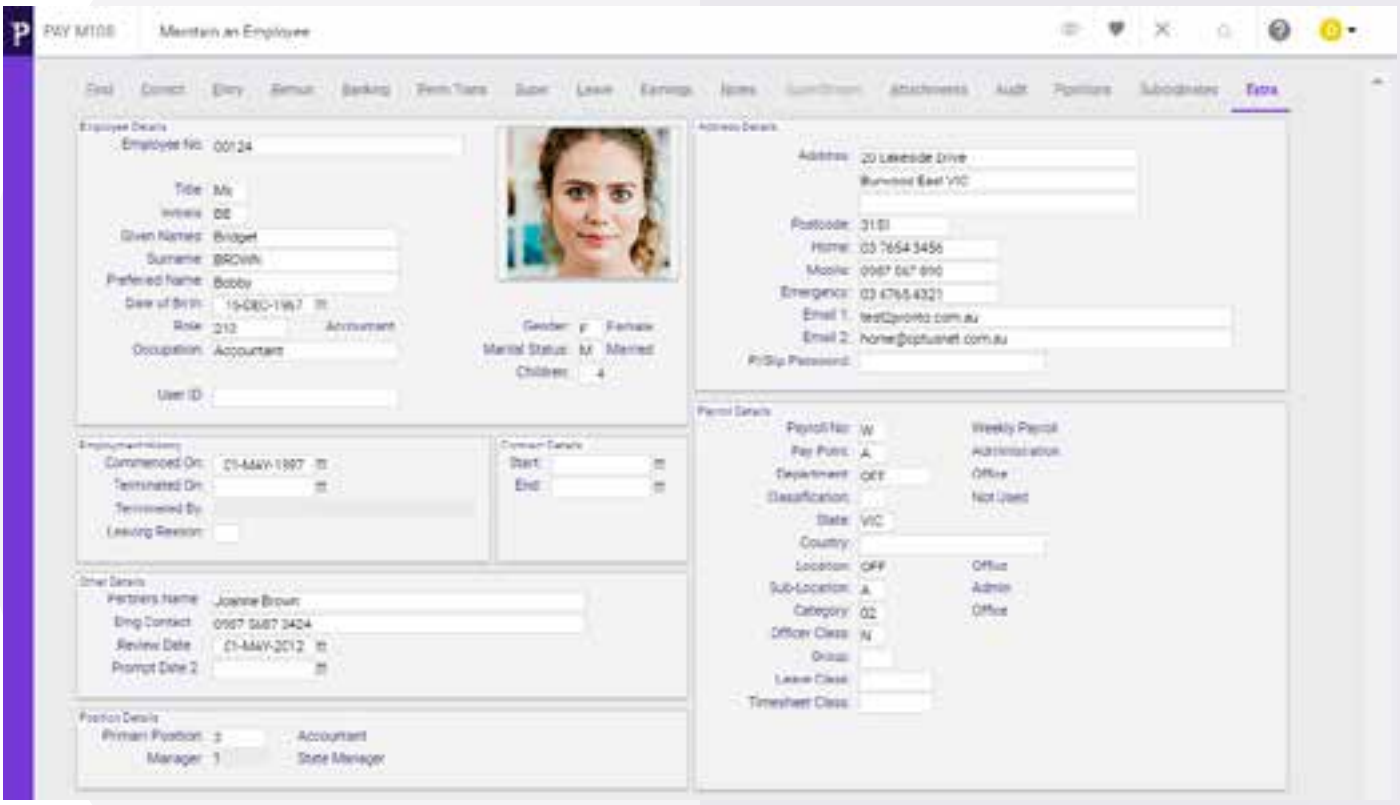
Employee details

A broad range of employee details can be entered to make your company's payroll as automatic as possible:

- Full remuneration details, including information about tax rebates and allowances, tax declarations, Medicare exemptions and any HELP debt
- Superannuation details, including payments by both employer and employee, and for multiple superannuation funds, as either a percentage or fixed value
- Leave details, including any special entitlements
- Banking details, with the ability to make payments to multiple banks and to pay a percentage or fixed value in cash

You can also register permanent transactions to be made for an employee such as normal hour's deductions, allowances, garnishee debts, child support, superannuation contributions and advance loans, as well as set the tax deduction to a certain percentage if the employee has an income tax variation.

Year-to-date (YTD) transactions for each employee can be viewed, with a drill-down to full details of each pay run.


PAY M108
Maintain an Employee
Extra
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Preferred Name Bobby
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Children 4
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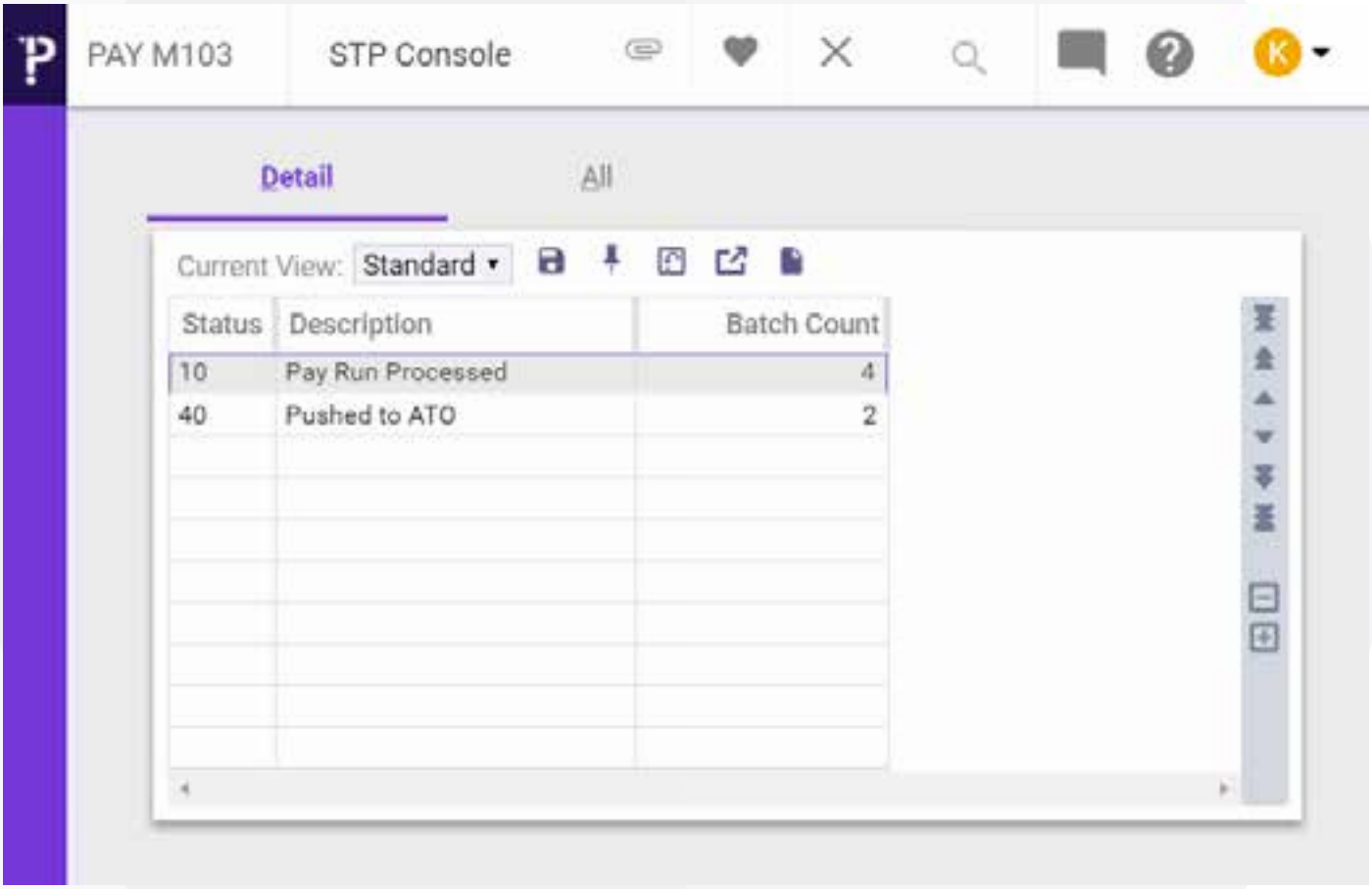

PAY M103
STP Console
Detail
All
Current View:
Standard
Status
Description
Batch Count
10
Pay Run Processed
4
40
Pushed to ATO
2

Single Touch Payroll

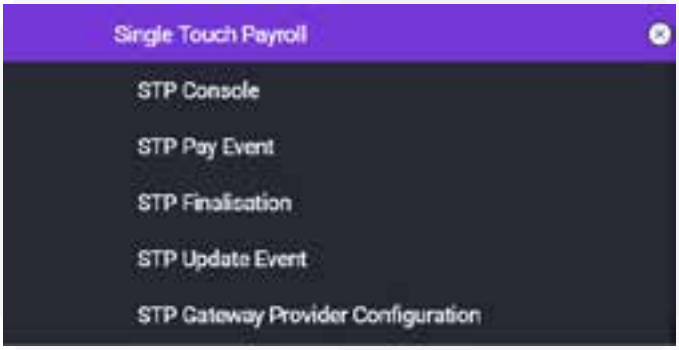
From 1 July 2018, Australian employers with 20 or more employees, are required to comply with Single Touch Payroll (STP) legislation. If your business has 19 or less employees, you will need to comply from 1 July 2019, subject to that legislation being passed in parliament – or you may opt in from 1 July 2018.

Employers need to report payments such as salaries and wages, pay as you go (PAYG) withholding and superannuation information to the Australian Taxation Office (ATO) when their employees are paid.

Pronto Xi is STP compliant and enables businesses to complete seamless reporting to the ATO.

The STP menu offers the following functions:

- STP console to help manage your STP submissions with the ATO
- STP Pay Event to submit pay run batches to the ATO
- STP Finalisation to send confirmation that employee year to date (YTD) information is final to the ATO
- STP Update Event to submit corrections to employee YTD to the ATO
- STP Gateway Provider Configuration to setup the link to the ATO via the third party gateway



Pay run workflow

The steps to prepare and perform a pay run are simple and logical.

Start pay run

This operation clears the previous pay run and allows you to set the pay run date.

Select employees for this run

Pronto Xi Payroll includes permanent pay transactions for employees selected in the pay run. Employees who have a next pay date after the date being processed will not be included; neither will employees whose pay is stopped for the current pay period (such as employees on leave without pay or suspended).

Timesheet entry

This allows you to add, modify or delete timesheets before processing the pay run.

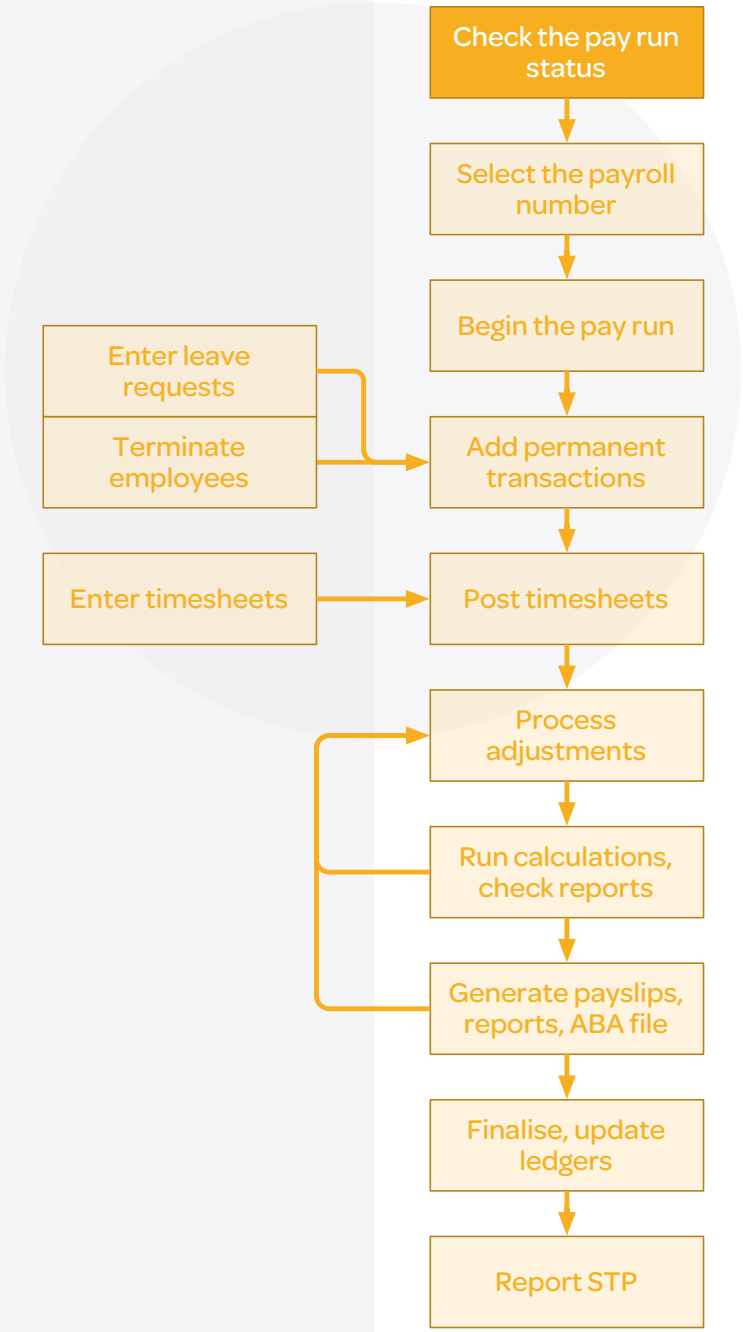
Pronto Xi Payroll can generate the pay transaction for the employee for the period using:

- The hours for each day keyed into the timesheet
- A table of pay scales for different types of day (ie. normal, weekend, overtime, public holiday)
- A calendar of public holidays

Variations to the timesheet entry screen cater for the needs of recruitment agencies and users of Pronto Xi Project.

Calculate Earnings for This Pay Run

Based on permanent transactions and timesheet entries, Pronto Xi Payroll will calculate the PAYG tax to be deducted, as well as any allowances and deductions, to arrive at the net value to be paid to each employee in the pay run.



Four reports will be produced:

- Errors and Warnings – Errors are shown and the pay run is suspended until they are corrected. Warnings of discrepancies (e.g. a person who has taken more leave than their entitlement allows) do not stop the pay run
- Full details of the amounts being paid to each employee in this pay run, including tax and other deductions
- Summary for each employee displaying leave accruals as well as gross and net tax, and all other allowances and deductions
- Comparisons of an employee's current pay and previous pays, showing any variances

Print pay slips and other advices

This function exports a file to order electronic transfers of funds from the company bank account to employees' accounts.

It also creates the employee's pay slip, with details of all amounts paid and deducted. Leave accrued, used and outstanding, such as annual leave,personal/carer's leave, rostered days off (RDO), and other forms of leave recognised by your organisation, can be included.

The General Ledger Postings Report is also created at this point, displaying full general ledger details to be posted.

Update employees

As the final step in the pay run, Pronto Xi Payroll and General Ledger are updated. In particular, Pronto Xi will:

- Update the employee's earnings history
- Write the pay transactions to the employee
- Update the employee's entitlements for any leave accrued, entitled and/or taken
- Update the YTD history by pay code
- Update the general ledger accounts that are affected by Payroll processing

There is also the option to restore the previous pay run, should the need arise.

Fringe benefits tax

Pronto Xi Payroll allows for entry of an employee's 'grossed-up' annual fringe benefit tax (FBT) amount. This amount should be entered prior to processing the payment summary, where the FBT must be included.

Payment summary

A payment summary can be printed:

- For one or more employees
- For all employees
- By ABN
- For a range of locations
- For current employees only, or terminated employees
- On blank office paper or pre-printed stationery

Information required by the Australian Taxation Office is available on magnetic media, electronic transfer, or paper.

End of year

Pronto Xi Payroll prepares for the start of a new financial year by:

- Clearing all earnings history records
- Clearing all previous year totals from employee and pay code records
- Setting payment summary flags to 'not printed'
- Setting the new payroll financial year

This process is done after payment summaries have been run, and before the first pay is run in the new financial year.

Human Resource Management

Human Resource Management (HRM) allows you to control the detailed information you need to meet the personnel management requirements of a large organisation. HRM is fully integrated with Pronto Xi Payroll and includes the following features:

- A user-definable organisation structure
- Recording of internal and external training
- Position vacancy tracking
- Employee position and salary summary
- Easy-to-maintain leave administration
- Human resource planning
- Ability to review all applicant details for each vacancy
- Statistical analysis of all employment categories

Reports

Pronto Xi Business Intelligence with IBM Cognos provides an extensive range of reports and report authoring solutions to meet your organisation's payroll information needs. Reports available in Pronto Xi Payroll include:

- Earnings by Pay Code
- Leave Liability
- Payroll Tax
- Superannuation Remittance Advice
- Superannuation History

Pronto Xi Employee Portal
Leave it to me

Empowering your employees and managers increases their satisfaction and efficiency.

Managing human resources places a large administrative burden on many companies. By reducing paper-based processes and streamlining tasks, Pronto Xi will help reduce this burden.

Built as a fully responsive web application, Employee Portal gives managers direct access to employee-related information, while employees can quickly perform day-to-day tasks on the go using a PC, tablet or phone.

Wherever your staff are, they can:

- Enter standard timesheets, project timesheets and allowances
- If users are using Resource Management Timesheets in the Employee Portal they'll be able to enter Total Hours or Start/Stop times and benefit from the award translation and automatic assignment of allowances.
- View and update personal details such as name, address and banking details
- Submit leave requests and attach digital paperwork such as medical certificates
- View and reprint payslips

Managers have access to extended capabilities:

- View leave requests and submitted timesheets
- Manage their to-do list such as leave request and timesheet approvals
- Estimate future leave balances

Quickly enter leave requests and timesheets, and access employee information anywhere

Flexibility as well as control

Tightly integrated with Pronto Xi Payroll functionality, the Employee Portal uses the organisation chart to ensure managers can only view information for staff within their management structure.

Administrators can determine the functionality available to users within the portal to ensure alignment to existing HR policy and processes. This control can even be set at the individual employee level, for example an administrator can selectively determine which employees can view personal/carers (sick) leave entitlement. Administrators can also customise the portal colour scheme and apply their company logo.

End users can personalise their home page as well as other view settings, allowing them quick access to their own key tasks and information.

PRONTO Xi

Distribution

Everything to everyone

Distribution
Contents

Distribution
Everything to everyone

Distribution is all about efficiency.

The more efficiently you move goods from your warehouse to your customer, and the easier your paperwork matches, the more profitable your sales will be.

Pronto Xi Distribution modules allow you to have clear visibility of your inventory by warehouse, no matter how many warehouses you have and no matter how many times it's been moved.

Most importantly, you can improve efficiency by optimising stock movements, reducing paper-based and manual processes, and having the information you need to make smart business decisions.

Straight down the line

The importance of distribution is often underestimated within an organisation. It isn't exactly glamorous, but it is one of the most critical aspects of the customer interaction because it is a direct reflection of whether your company delivers what it promises.

Included in core Pronto Xi are three fully integrated modules specifically designed to optimise your distribution performance.

Pronto Xi Inventory

Pronto Xi Inventory offers complete inventory visibility across any industry. Track your inventory by quantity, movement and other relevant information, automate ordering and replenishment functions, and reconcile everything back to the fully integrated General Ledger.

Pronto Xi Sales

Pronto Xi Sales gives you complete control over the sales order management cycle. It handles the processing of sales orders, produces picking slips and prints consignment notes, manifests, labels and customer documentation.

Pronto Xi Purchasing

Pronto Xi Purchasing is an efficient procurement solution providing tight cost control and simplifying your purchasing activities by managing your domestic and foreign supplies and shipment processes. Have the insight you need to plan future inventory requirements.

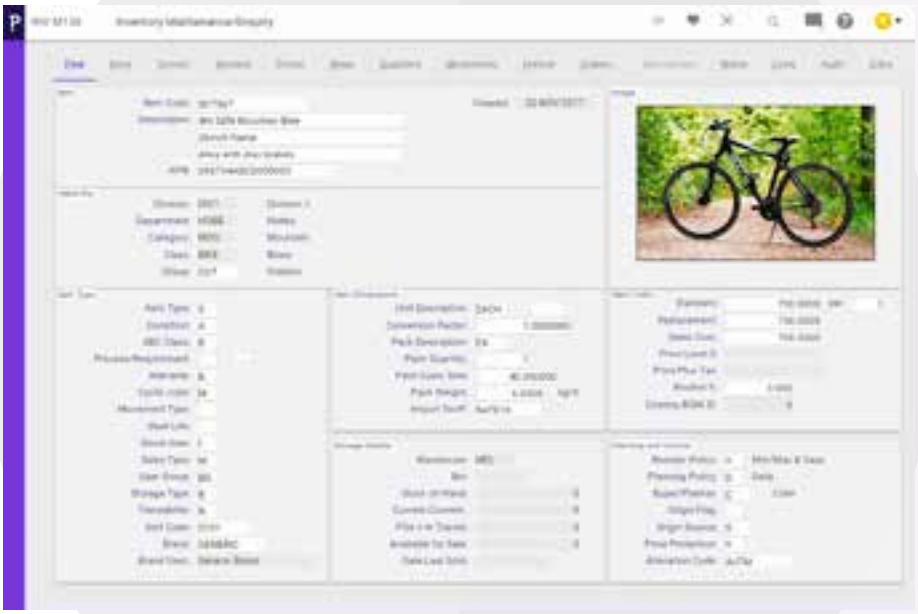
Pronto Xi Inventory
Keep track in any field

Pronto Xi Inventory efficiently controls all your product flows.

Because most changes to inventory levels are the result of processing in other modules – such as Purchasing and Manufacturing – you have complete visibility and can track your inventory by warehouse.

Pronto Xi Inventory includes:

- Multiple warehouses, suppliers and prices per item
- Multiple Units of Measure (UOM) and full First-In-First-Out (FIFO)
- Support for Global Trade Item Number (GTIN) barcodes
- Standard, Average, FIFO, Actual and Replacement costing
- Serial number and lot tracking
- Item licences
- Full stocktake/cycle counting
- Interactive image display for products
- Automated reordering and replenishment



Understand your inventory at a glance

Inventory master

Pronto Xi Inventory records all the information and transaction history of an item. To create or maintain an item, you can use the main inventory maintenance screen or industry-specific screens. Chemical, paper, retail, wholesale distribution, timber and mining are some of the industries with specialised maintenance screens.

The different types of items handled include:

- Stocked or standard – a normal, saleable item, which is typically purchased but can also be manufactured
- Manufactured – manufactured items that have components, a bill of material (BOM) and routings
- Raw materials – items that are not saleable and do not have a BOM, but can be transferred using a transfer sales order
- Indent – items that are not normally held in stock, but purchased subject to a sale
- Kit – a combination of various types of items
- Labour – items that can have a cost and a selling price but there is no necessity to control quantity on hand (eg. items used as components to cost labour in a BOM or in kits)
- Specials – items that can have a cost and a selling price but because they are generally used to control cost overhead recovery or consumables (eg. expense items such as stationery, electricity), there is no necessity to control quantity on hand

Inventory Master records can also include additional information or notes such as hazardous or dangerous goods documentation.

Process requirements - managing multiple processes

Pronto Xi Inventory provides you with the flexibility to manage multiple processes for the single inventory item. For example you may have an item that needs to be configured as back-flushed in line with your manufacturing process but also requires license controls. The process requirement functionality enables you to simply configure the required options in one easy step.

Classify and control inventory within your warehouse

Inventory maintenance

In Pronto Xi Inventory, the main inventory maintenance screen provides detailed information about items. Its menu options give you access to additional screens for warehouses, suppliers, pricing, alternatives, notes, BOM and more.

Warehouses

You can maintain pick and bulk locations against each warehouse. Additional tracking of inventory is available in Pronto Xi Warehouse Management System.

Pronto Xi Inventory records and tracks movements, costs and commitments for each item in each warehouse. You can use this information for reordering requirements, while the warehouses screen allows you to:

- Determine inventory postings to the general ledger
- Record sales history
- Automatically receive items from other warehouses via internal transfer orders

Various types of warehouses are accommodated, such as standard and advanced warehouses, factory, service van (inventory stored in fleet vehicles) and consignment.

Detailed inventory-level information is kept for each warehouse where an item is held. This includes stock on hand, commitments to various kinds of orders and what is on order from suppliers.

A summary of the inventory movements in each warehouse is recorded and displayed by transaction type.

Maintain unique relationships with every customer

Connect easily with trading partners

Suppliers

Any number of suppliers can be specified, allowing you to set them up for an item by region and record pertinent information, as well as track their performance levels.

The supplier attributes include:

- Supplier preference
- Supplier item code, description and conversion factor
- Minimum order quantity
- Supplier item group
- Pack quantity and volume for cost apportionment of the freight charges
- Supplier estimated and last lead-time
- Multiple quantity price breaks by supplier
- Foreign currency pricing

Pricing

Pricing structures can be set within the Inventory Master record. You can maintain multiple pricing levels for each item as well as promotional prices for specified periods, and set up price algorithms and discount matrices. Tax rules are appropriately handled either at the item level or globally.

The basic pricing record of an item consists of a base price, multiple prices for different categories or quantity breaks, and the recommended retail price. Each item may have additional pricing structures defined by customer group.

Prices can be recalculated for items based on a mark-up value or by applying a percentage increase over current prices. Your current price list can be copied into a price maintenance environment where price changes can be manipulated before updating the current price lists.

Pronto Xi Inventory also allows you to keep track of your competitors' prices.

Inventory master fields

Item code

The item code is an alphanumeric field used to identify items throughout Pronto Xi.

Description

Each item has a three-line product description. Extended note facilities provide unlimited text to be stored for internal and external purposes.

Search by item code, GTIN and product description is available.

Product hierarchy

As a multilevel classification system, the product hierarchy allows a business to clearly define its product taxonomy. The five-level structure provides many benefits, including greatly enhanced inventory management and reporting capability via Pronto Xi modules such as Business Intelligence.

You can select how many of the five 'levels' of the hierarchy are turned on and flexible maintenance allows the hierarchy to be maintained from the top down, or bottom up, making it suitable for various business needs and industries.

Associated functions such as price maintenance, reordering and bulk item maintenance are able to leverage active hierarchy levels. Data integrity is maintained by enforcing the hierarchical relationships between each 'child' and 'parent'.

Optimise your stock levels

Product group

You can categorise items by item groups, which allows for:

- Recording sales history
- Posting to the general ledger for sales, cost of goods sold and more
- Reporting
- Dissection of prices, discounts and promotions
- Calculation of sales representative commissions
- Inventory valuation

Posting of inventory transactions to the general ledger is fully automated.

Prices, discounts and promotions can be established based on item groups, for example, contract price by customer/item group, and promotional discount by customer type/item group. Special commission rates for sales representatives by item group can also be established.

APN

An Alternative Part Number (APN) for a specific item can be used to contain the code of another item, which is cross-referenced when the item is superseded.

GTIN

The universally recognised GTIN (Global Trade Item Number) is more commonly known as the industry-accepted barcode for a specific item. A single item can have multiple GTINs to reflect various units of measure, such as consumer unit, traded unit or pallet.

Both APN and GTIN can be used for enquiry, reporting and scanning directly into Pronto Xi Inventory.

Units, packs, sizes and weights

Multiple units of measure for the sale, warehouse storage and procurement of each inventory item can be used. Pack weights and cubic dimensions can also be stored.

Traceability

Pronto Xi Inventory allows for various means of traceability:

- Serial-tracked – can be used when the goods are received, at despatch, or both
- Lot-tracked (for batch tracking) – allows for full traceability from purchase to product recall if required
- Purchase-tracked – tracks by purchase order number

Import tariffs/excise tax

When an item is imported from a foreign supplier, the tariff charged is dependent upon the country of the supplier and the nature of the item.

Pronto Xi Inventory uses a 'country code' to identify the country of origin, and a 'tariff code' to identify the class of the item for tariff purposes. The country code is stored against the supplier while the tariff codes are held at the item level.

Inventory transactions

Comprehensive transactional details are held for each item and warehouse, including control numbers (eg. serial number, lot number), source document and financial information. Users can define the retention period for historical data files.

Issue/adjust inventory

Most inventory issues occur within other modules such as Pronto Xi Shopfloor Manufacturing and Sales. However, in some instances there may be a need to record inventory issues manually. These can be recorded against:

- Manufacturing (Factory/WIP or Work Order)
- Project (General Ledger or Service Call)
- General Ledger
- Maintenance
- Inventory Adjustment
- Receipts from Purchase Order or Work Order

This function is normally performed within the Purchasing module, but Pronto Xi Inventory provides a fast and simple option to receive goods from a supplier that have been purchased without processing a formal purchase order.

Goods that have been allocated to a work order are sometimes returned unused. This option can be used to return the components back into inventory.

Manufactured Goods Receipt is a simple method of recording the receipt into an inventory of manufactured items. It can be used to receive manufactured items without using the BOM to create and process a work order.

Quality analysis

Goods for release can be held until they have passed through your quality checks. If goods do not pass the checks, Pronto Xi Inventory allows you to reject, scrap or return the items to the supplier.

Reorder processing

Pronto Xi Inventory provides reordering functions to automatically create purchase orders and work orders according to selected criteria. A review process can be undertaken prior to the creation of the actual orders.

Reorder Reports, which calculate the reorder quantities needed to satisfy commitments, minimum inventory levels, maximum inventory levels, or a combination thereof, can be generated. Average sales history, average warehouse demand or forecast can also be used to create planned requirements.

The reorder processing calculation considers a number of factors, including:

- Minimum and maximum days cover
- Minimum and maximum inventory levels
- Economic order quantity
- Lead time
- Current inventory level, including current commitments
- Items on order from supplier
- In transit
- Internal requisitions

Budgets

Pronto Xi Inventory holds budget information at the item level, planning group level or item group level.

Budgets can be manually entered for each period of the year, and spread factors to apportion the total annual amount based on the relative weighting/ratio as specified for each period can be used. Numerous reports are available to compare budgets against actual sales as well as budget listings.

Costing

Various costs, such as Standard, Average, FIFO and Actual, can be maintained for posting purposes, inventory valuation and sales margin reporting. Inventory valuation reports can be produced at any time using the costing method of your choice, and if necessary costs can be recalculated based on a range of factors.

Landed costs are calculated as part of the shipment costing process (please refer to Pronto Xi Accounts Payable for more information).

Kits

Kits are a list of components made up from saleable items that can be optionally selected during the sales order process. For example, a personal computer, keyboard, monitor and mouse can be sold individually or as a kit. Various categories of kit component lines are accommodated, including:

- Mandatory
- Optional
- Variable quantity
- Grouped options

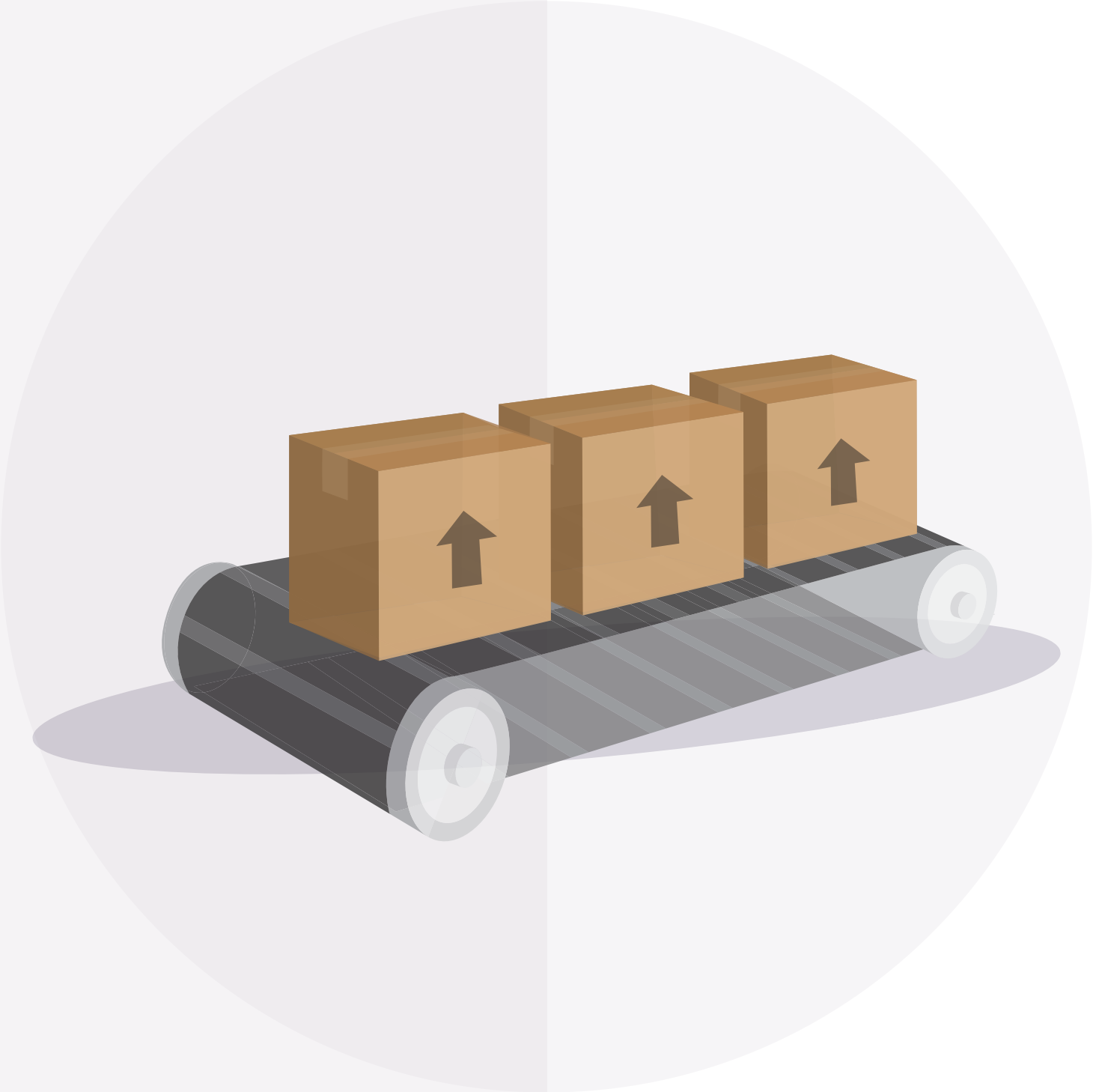
Kit pricing can either be generated from the components or simply selected from the item price record.

Stocktake

To help you measure your inventory accuracy, a snapshot view of your holding can be provided, with any adjustments automatically reflected in the general ledger. Wall-to-wall and cycle counting techniques are supported to comply with company policies, as well as data capturing techniques such as tickets, bar coding, radio frequency (RF) and cards.

The stocktake process can include:

- Initial pre-stocktake check – reports any outstanding inventory-related transactions that may need to be completed prior to the final snapshot of the book inventory
- Prepare stocktake – creates a snapshot file of your inventory holding and can produce a Stocktake Report (a unique stocktake control code is generated as part of this process to allow for easy identification and parameters)
- Stocktake refreeze – resets the snapshot file if further reprocessing has taken place that will affect the book inventory of the original snapshot
- Enter counts – employs multiple data entry techniques, including manual
- Produce reports – to assist with reconciliation, including Uncounted Items, Variation and Valuation
- Update stocktake – performs an update once the stocktake is finalised to make all necessary adjustments to the stock ledger and general ledger for the appropriate accounting period



Pronto Xi Sales
Bring your sales into order

With Pronto Xi Sales, handling a full range of sales order processes and integrating with your inventory control and financial management systems has never been easier.

Numerous user-definable options allow you to tailor the entry screen and all stages within the order lifecycle process to meet your specific requirements. High order volume through to highly configured product environments demand scalable order entry solutions. With the use of order templates and copy features Pronto Xi Sales delivers an optimised approach to order processing to enhance and empower your sales team.

Manage every aspect of distribution ranging from forward orders, quotations, consignments, warehouse transfers and returns within simple intuitive screens. Drill back features and clear visibility of inventory on hand and costs mean that you have a 360 degree view right across your distribution network.

Pronto Xi Sales features include:

- User-definable order entry screen
- BOM configuration capability
- Automatic inventory allocation
- Internal transfer/work orders for unavailable inventory
- Management of kits
- Credit checking and display at order entry/edit
- Multiple warehouse capabilities
- Direct links between sales orders, purchase orders and work orders
- Automatic freight calculations
- Full sales history retention
- Item alternatives and multiple selling units of measure
- Full back-order management

Sales order integration

Pronto Xi Sales is fully integrated with Pronto Xi Inventory, Accounts Receivable, General Ledger and Customer Relationship Management. When a sales order is updated, available inventory, customer data, sales history, inventory movements and relevant general ledger accounts are all automatically updated by Pronto Xi.

Where Electronic Data Interchange (EDI) is required, Pronto Xi EDI delivers sales order automation at file Import. Automatic sales order creation is also found across other modules, Service, Rental and Project provide bulk creation processes based on agreed billing cycles.

Rapid order entry and all information at your fingertips

Sales order entry and maintenance

You have the flexibility to configure sales order entry to map your business processes and ensure fast order entry.

1. Sales order header
   Once the customer is selected, the sales representative, price level, territory and available credit are automatically applied to the sales order. Integration with Pronto Xi Accounts Receivable ensures a very fast sales order entry process without data duplication and errors.
2. Sales order lines
   Items requested by the customer are entered and extensive inventory information is available to the salesperson, including pricing and availability. If an item is not available, alternatives that may satisfy the customer can be displayed. Additional costs associated with fulfilment can be recorded and you can choose to charge for freight, packaging and handling or any other costs that need to be recovered.
3. Sales order conclusion
   When all the items have been entered, the options available at conclusion allow for a variety of further processing.

If the ordered items are available, the picking slip for this sales order is ready to be printed in the allocated warehouse.

Sales order types

Pronto Xi Sales handles a range of order types, allowing for increased convenience and flexibility. The order type defines the underlying business process and includes:

Normal sales orders

You can track the progress of a sales order by its status. For example, if its status is 'Work Order Created', then the item is in the process of being manufactured.

If the goods ordered are not available in the warehouse that normally despatches to the customer, you can check if the goods are available from other warehouses. If so, the items can be despatched automatically or transferred to the originating warehouse.

Pronto Xi can also create work orders or purchase orders directly linked to sales orders for unavailable items. You can drill-down from the sales order to track progress.

Credit notes

Extensive credit note facilities are available. A full or partial credit can be raised automatically loading the original invoice lines and prompting for the type of credit to be processed (entire order or line-by-line).

Limits for the raising and approving of credit notes can be set and appropriate warnings given. Credit types available include:

- Credit and recharge of inventory
- Net price/discount credit and recharge
- Return to inventory
- Inventory write-off
- Credit of a charge
- Inventory exchange
- Issue new item free

Transfers

Pronto Xi Sales allows you to create a transfer order to properly control and document the sequence of events necessary to move stock between warehouses. The production of picking slips and transfer documents ensures control over the movement of goods.

Quotations

As well as being able to produce quotations, you can easily manipulate the pricing based on cost, mark-up and other criteria. Inventory is not committed to the quotation until it is converted into an order.

Quotations can be configured for customer-specific requirements. During negotiation, all adjustments or reconfigurations automatically recalculate the details.

You can also have quotations pass through an acceptance phase before they are converted to an order. If the quotation is rejected, you can enter the reason for the lost sale. This information can later be reported on, allowing you to identify trends and causes for lost opportunities.

Internal sales

Orders from within your organisation can be accepted. The department requiring the product will raise an internal requisition and this will be treated as an internal sales order allowing for accurate tracking of inventory as well as possible freight charges.

Efficient customer service with configurable entry

Forward orders

You can enter an order with a future delivery date without immediately allocating stock that would otherwise be available for immediate sale. Inventory is not allocated to a forward order until closer to the supply date.

Regular deliveries for a forward order can be scheduled if, for example, you need to supply a customer with a quantity of items on the first of every month.

Contracts

When a customer has a contract to purchase goods or services to a maximum value and quantity, these details can be recorded on a contract order. During normal order entry, Pronto Xi Sales will allow the contract number to be entered and ensure that the contracted details are applied.

Proformas

A proforma order is a standing customer order that lists the items normally purchased. To save on the administrative effort associated with a new customer sales order entry, the proforma can be directly accessed by the data entry operator and items selected from it.

Return authorisation

Pronto Xi Sales allows you to manage and track the entire lifecycle of customer returns. Efficiently log Return Authorisations and control how items are returned to stock, written off or recharged and credited, all conducted within a single Returns Management screen.

The Returns Management process delivers features such as:

- Creating a product return request
- Reviewing and approve the request to return
- Confirming arrival of the goods back into the warehouse
- Returning the goods to your supplier for credit, replacement or repair
- Returning the goods to the warehouse for resale
- Creating a work order to have the goods repaired, reworked or disassembled
- Raising a full or partial credit note for your customer
- This allows you to keep a close track of goods that have been returned and report on the reasons for returns to assist in forecasting future requirements, addressing areas of concern and recording the performance of the supply chain

Manage the entire returns lifecycle with greater accuracy and control"

Schedule order

A sales order can be scheduled for a split delivery so that it is fulfilled progressively over time, for example, by a certain quantity every week. You can specify the delivery dates and the number of items for each delivery.

Recurring Sales Orders

Now you can automate the scheduling of orders, reducing administrative time. This is particularly useful for transactions with a predefined supply of goods and services over a given period.

Create billing templates, defining the frequency for each invoice. The agreed price of goods and services is set upon creation of the invoice and takes into account pricing fluctuations.

When new invoices or orders are created automatically, the built-in notification system delivers email alerts.

Credit control

If a customer is 'on hold', or over their credit limit or terms, the data entry person will be warned. Pronto Xi Sales will set the order status to either 'on hold' or 'credit hold' depending on the circumstances.

A Credit Officer can be automatically notified by email when orders are placed on hold, and may choose to release the order(s) for despatch.

Backorder/inventory allocation

You can view sales orders to check for current inventory commitments at any time. When there is insufficient inventory to satisfy a customer's order, a number of options are available, depending on both the customer's nominated backorder and part shipment policies. Some of the options include:

- No backorders allowed – a backorder won't be created for any item not supplied on the original
- Part shipments not allowed – the order is held for despatch until all items are available
- Backorders allowed – the backorder is supplied when the next order is placed (merging the backordered items with the next order)
- Part shipments allowed – available items are despatched and remaining items placed on backorder

When part of an order is placed on backorder, Pronto Xi Sales refers to the original order to identify the backorder for ease of tracking.

Inventory allocations can be performed manually or automatically based on the parameters set. Items can also be automatically allocated to backorders on receipt of goods from a purchase order or shipment.

Sales budgets

You can set sales budgets in Pronto Xi Sales, Accounts Receivable or Inventory based on customer, item code, territory or item group.

Apply a user-defined spread factor across the year, or set budgets for each period. The spread factor can take into account seasonal fluctuations, geographic differences or other things that influence sales at various times.

Sales order enquiry

A range of sophisticated enquiry facilities enables an order to be found easily. Enquiries can be made by account code, product, customer reference, warehouse, user ID, invoice number, credit note number, status, order number, delivery and/or consignment note number.

Sales rebates

Depending on your specific requirements, Pronto Xi can calculate rebates based on percentages, flat values or quantities.

Customer rebates

Rebates can be calculated for a number of combinations, including customer code, customer group, item code, item group and item group class, and forwarded to the customer in a number of ways.

As a sale is made to a customer, the invoice program determines if any rebate is due on the sale. When a customer rebate is applicable, the relevant sales history files are updated and provisional postings made to the general ledger.

In addition, a report is run prior to the preparation of statements to calculate the rebate amount the customer has achieved.

Manual customer rebates

Rebates can be calculated by customer and item code, using a percentage rebate rate. The rebate is applied to the sales order line shipped amount (excluding tax).

Royalty rebates

Royalty rebates can be calculated by item using either a value or a percentage. The cost of the sales order line is updated to include the rebate calculated, which affects the sales history.

Pronto Xi Warranty

Pronto Xi Warranty allows you to easily enter and track warranty claims and manage product returns.

As well as maintaining notes, instructions and fault description for the warranty work, you can:

- Print invoice and consignment notes for the current job
- Convert quotation to order
- View machine details for the current order
- Raise, view or maintain purchase orders
- Finish or cancel the current job

Pronto Xi Purchasing
Perfect procurement

Pronto Xi Purchasing is a highly efficient procurement solution, capable of managing both domestic and foreign supply and shipment processes. It can also help you plan future inventory requirements.

By combining data on inventory levels, sales history and current commitments, purchase orders can be automatically created. Purchase orders and shipment receipts also automatically trigger updates to inventory levels, and invoices are matched off and posted to the general ledger.

Pronto Xi Purchasing functionalities include:

- Full integration with all other Pronto Xi modules
- Purchase authorisation limits
- Internal requisitions
- Tracking of orders through placement, despatch, receipt and invoice
- Goods receipt by order or shipment
- Blanket and contract orders
- Returns and quotation requests
- Tracking of international shipment charges
- Calculation of inventory costs from shipment charges
- Allocation of costs by various methods, including weight, value and volume
- Automatic reordering
- Multiple currencies
- Multiple cost allocations per line
- Shipment re-costing

Manage your inventory and spending

Requisitions

You can raise requisitions prior to the entry of a purchase order and instruct Pronto Xi Purchasing to ensure that an authorised person approves the requisition before the purchase order is raised. There is a full range of functions available to be used in association with requisitions, including approval process and full enquiry.

Purchase orders

Purchase orders can be automatically created by Pronto Xi or entered manually by the purchasing officer following a simple process. There is also the flexibility to configure these steps to map your business processes and ensure fast order entry.

Purchase order header

When a supplier is selected, its default parameters are automatically applied to the purchase order. Integration with Pronto Xi Accounts Payable ensures a very fast purchase order entry process without data duplication and errors.

Once an order has been entered and approved, the order may be printed and the inventory updated to show the quantity now 'on order'. Purchase orders may be maintained to record any changes, for example:

- Multiple delivery docket numbers
- Altered order status
- Updated inventory levels and ledgers
- Duplicate, break or split orders
- Contract order variances
- Returned items

Purchase order lines

Within the purchase order lines screen you have access to full inventory enquiry, warehouse levels, pricing and available units of measure. You can also add notes, internal memos, additional charges and more.

Purchase order conclusion

Once all items are entered in the purchase order, they can be further processed.

Control your procurement

Goods received by order

You can record the receipt of the goods once a purchase order is entered and printed. The invoice can be processed before or after receipt.

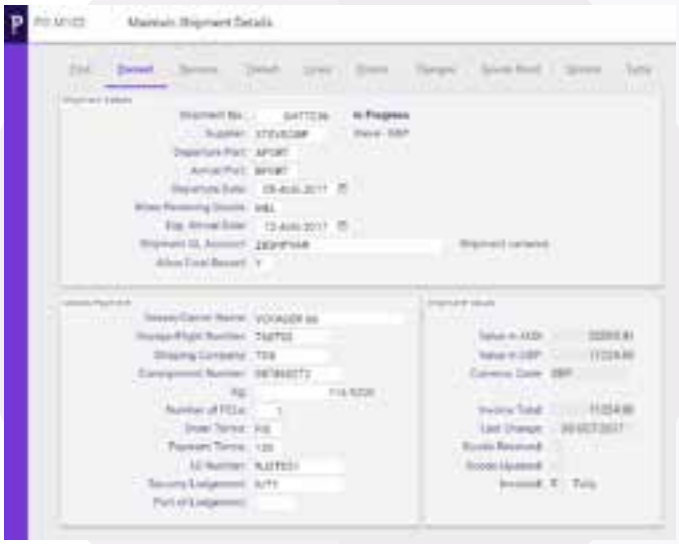
If goods are received that do not appear on the original purchase order, you can add a new line to the order. If you are using FIFO inventory management, Pronto Xi Purchasing writes a FIFO record for each line item in the delivery.

If you receive only part of an order, there is an option to place the remainder on backorder. From a purchasing viewpoint, the items are still on order and no additional processing is required. If undelivered goods are not put on backorder, the remainder of the order is considered cancelled and the quantity of items on the order is adjusted accordingly.

Once goods are received you can update the purchase order to allocate the items to the destination warehouse. The received goods are deducted from inventory on order or in transit (depending on order status) and added to the inventory on hand at the destination warehouse. Actual delivery dates and lead times are recorded.

Warranty order/ warranty exchange

Warranty orders result from warranty claims. They are linked to either a dealer/customer claim or a warranty workshop job number. All the items and non-stocked lines are loaded onto a warranty purchase order. The item(s) to return can be selected. A financial claim can be entered via a special line for the amount being claimed.



Shipment management

A complete shipment management capability is included, allowing you to group several orders against multiple international or local suppliers into one shipment. Subsequent processing of the orders, including delivery and invoicing, is handled through the shipment processing functions.

Shipments are used to record despatches of goods from suppliers. The shipment can include items from a number of purchase orders and can record any freight or other associated costs. Using shipments lets you track the progress of the goods and calculate landed costs.

Standard, Average, First-In-First-Out (FIFO) and Actual costing techniques are supported for foreign shipments. Charges incurred in the shipment can be automatically recorded and incorporated into revised average and landed costs.

Receiving a shipment books the goods attached to the shipment into the destination warehouse.

Incoming shipment notifications

Incoming goods data can be received electronically in advance of the goods arriving, allowing you to better plan your inwards goods operation. This information will typically be sent via a supplier's Electronic Data Interchange (EDI) 'Despatch Advice' or 'Advanced Shipment Notification' message, provided you have an established EDI trading relationship in Pronto Xi.

Advanced notification will also be used to create or update purchase order shipment information, in preparation for the actual goods receipt into your warehouse.

Invoicing

Purchase orders and shipment management invoices are posted via Pronto Xi Accounts Payable. An enquiry on the supplier allows a drill-down to the supporting purchase order and shipment.

With sophisticated handling of purchase order invoice variances, tolerance limits can be set to determine if a payment approval is required. Pronto Xi allows for variance of price, quantity or charge. Decisions can be made on whether to apply the change to the goods or raise a credit claim.

Integration with Pronto Xi General Ledger

Transactions created and entered through Pronto Xi Purchasing are automatically updated to Pronto Xi General Ledger and Accounts Payable according to the settings you have specified in your Special Accounts.

Variance accounts, tariffs and duties

Pronto Xi Purchasing allows you to record charges associated with the goods being shipped against a shipment. The duty payable is calculated from the duty rate and purchase price of the item so that it doesn't need to be manually entered as a shipment charge.

Costing and recosting

Pronto Xi Purchasing calculates the landed cost of an item both at the goods receipt and recosting stage. It automatically spreads the value of all shipment charges across all items on the shipment based on the selected distribution method. A Shipment Costing Report detailing the apportionment is produced at this stage.

Flagging the shipment for final recosting allows goods to be booked into inventory and sold prior to the final charges being known. At the final recosting stage the new landed cost of the item is recalculated, revaluing the inventory on hand.

If the inventory has already been sold, cost adjustment sales orders are created to reflect the correct cost for sales history reporting, and perform the relevant postings to the 'Cost of Goods Sold' accounts in the general ledger.

Purchase orders and shipment enquiries

The Pronto Xi Purchasing enquiry function allows you to quickly find and retrieve detailed information on purchase orders and shipments in a number of different ways, including by order number, warehouse, status of orders, supplier, item code and requisition number.

Supplier rebates

Supplier rebates can be set up and entered against purchase order invoices at the time of invoice entry. The rebate amount is automatically calculated based on the invoice amount.

Supplier target-based rebates are also permitted, where a quantity or amount is entered with a discount percentage for that target. This percentage is not applied to an actual purchase order, but is an amount paid as a rebate from the supplier at a later date. The target applies to a period of time and the discount applies when the cumulative purchases during that period exceed the target.

Actual rebates paid by the supplier can be entered, and Pronto Xi Purchasing issues a warning if an amount greater than calculated is entered.

PRONTO Xi

Sales & Marketing

Make money talk

Sales & Marketing
Contents

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.

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.

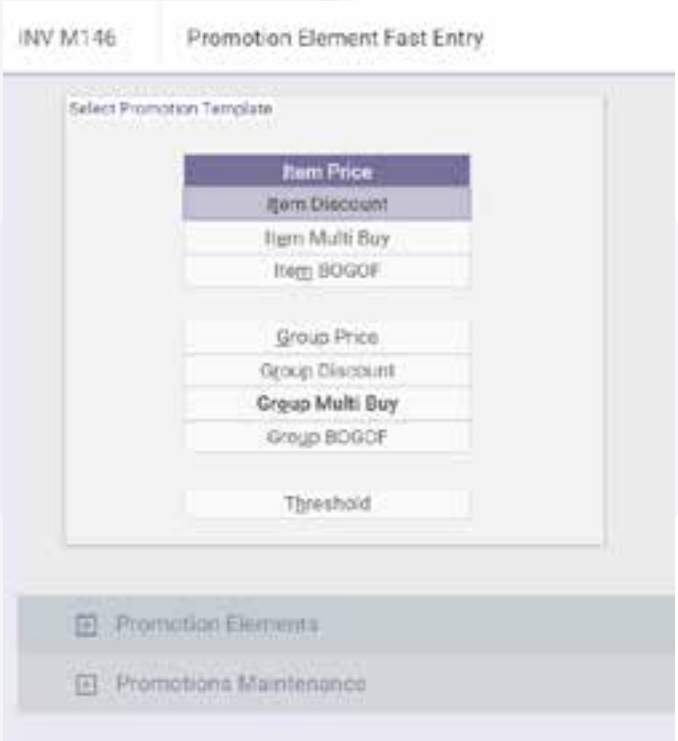
Powerful retail promotions management

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.



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.

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.

Easy configuration of a POS skin to match your operations

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.

Store allocations

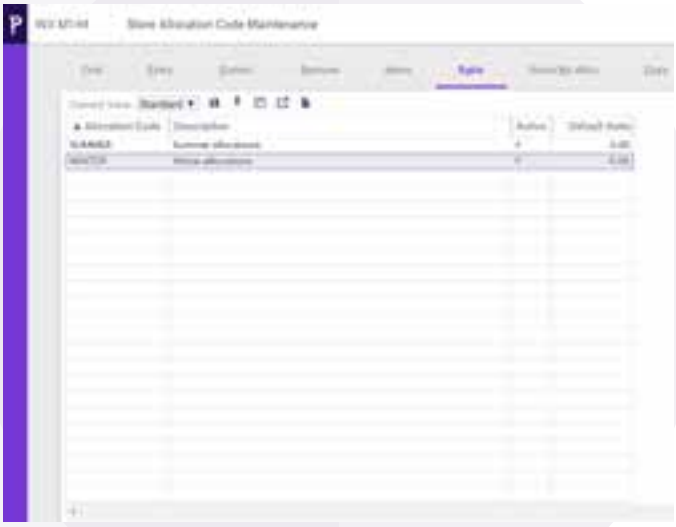
Store allocations provide a flexible way to supply stock to a network of locations. By employing a 'Push' supply model, it automatically aligns products with the stores most likely to sell them, minimising the time taken to allocate product, reducing costs and maximising profit.

You can prioritise your locations to allocate stock to preferred stores first via a 'Store Grading' and 'Allocation Code' structure. Allocation codes link stock and stores with a ratio that predetermines what percentage of stock is allocated to which stores.

These codes can be set up by:

- Item
- Brand
- Levels contained within the stock hierarchy
- Buyer Code
- Style, colour, size
- Supplier

Allocation codes can further streamline workflow in your procurement cycle. Once stock is ordered, the allocation routine can be run and attached to the purchase order ready for receiving and transfer to stores. This decreases the turnaround time in the warehouse and gets stock on the retail floor faster.



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.

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

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.

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.

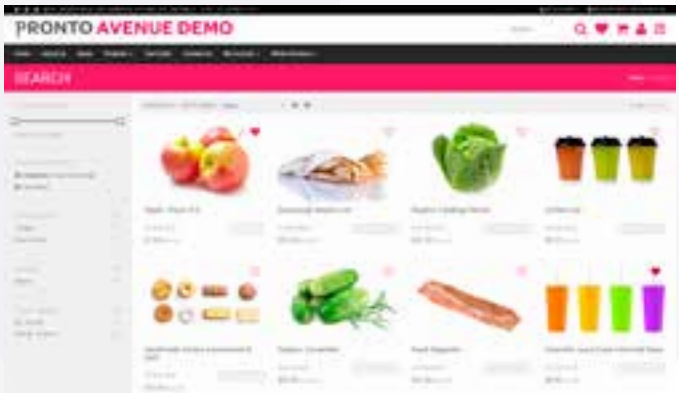
Manage your own content

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 maximises 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

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 155
- 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.

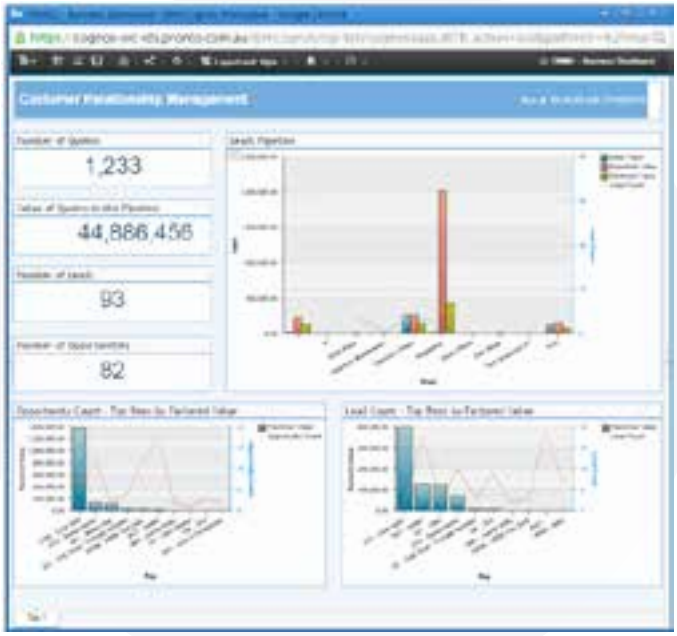
User-definable views and key search capabilities allow you to quickly and easily locate the information you require in a succinctly presented, graphically rich format.

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

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.

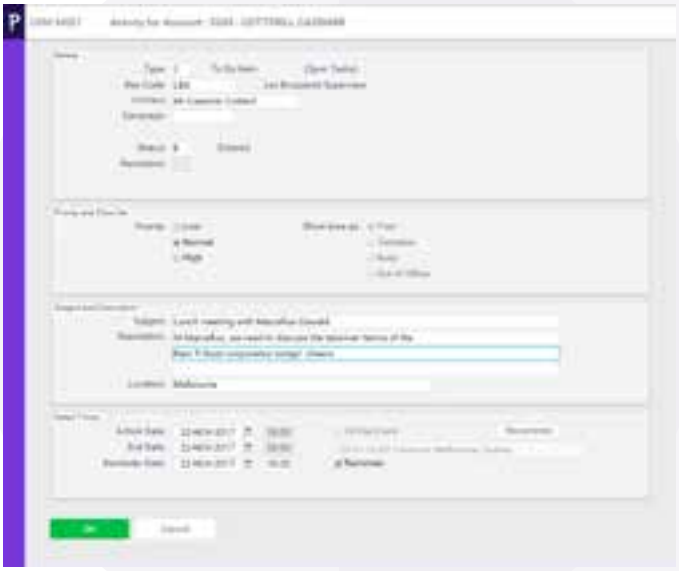
A range of attributes can form part of the selection criteria and can be combined into complex logical expressions. Each list can also be refined using the Keep/Drop option to apply further selection criteria and various reports can be generated, including mailing labels and mail-merge lists.

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.

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.

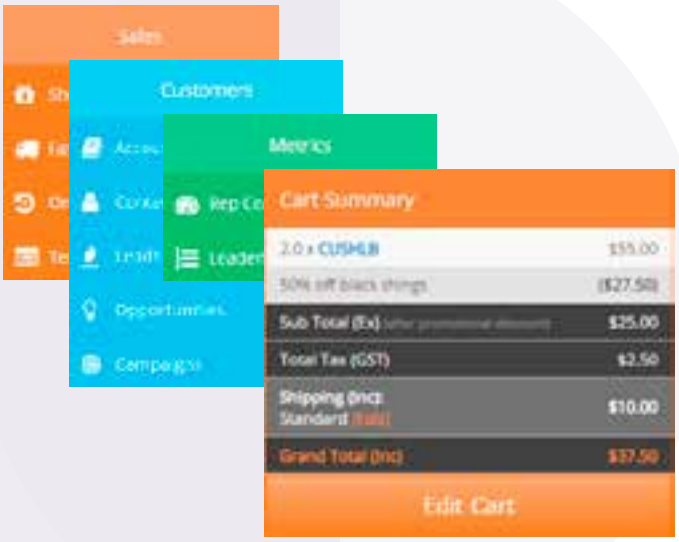
A powerful mobile sales rep console with a customised dashboard makes it easier to track progress and remain on target. Reps can see their top clients, products and prior sales at a glance, as well as their sales progress MTD and YTD.

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

PRONTO Xi

Supply Chain

Keep things moving

Supply Chain
Contents

Supply Chain
Moving right along

Get the right items in the right quantities to your warehouse. Store and retrieve them efficiently. Distribute them intelligently to your stores or customers.

We've developed a number of integrated Pronto Xi modules that put you in control of your stock – from distribution planning to forecasting, warehouse management to supply chain collaboration tools.

Minimise costs by reducing paper-based and manual processes, including inventory and shipping expenses, data errors and administration time. Improve customer loyalty through better service and increased value.

Enjoy increased visibility of end-to-end processes and improve performance, efficiency and productivity across the full breadth of your supply chain.

Keeping up with demand

Ultimately, supply chain management is all about ensuring you can meet demand on time, every time.

Our Pronto Xi platform allows you to choose from a number of fully integrated supply chain tools to tailor a system that suits your business infrastructure and management requirements.

Pronto Xi Warehouse Management System

Automates a wide variety of functions for large or busy warehouses.

Pronto Xi Distribution Requirements Planning

Allows you to set up and streamline multi-warehouse and multi-factory supply chain processes.

Pronto Xi Forecasting

Improves your inventory management by providing accurate ways to predict future demand for your products.

Pronto Xi EDI

A flexible Electronic Data Interchange (EDI) messaging product that facilitates the exchange of structured business documents with your trading partners.

Pronto Xi RF Scanning

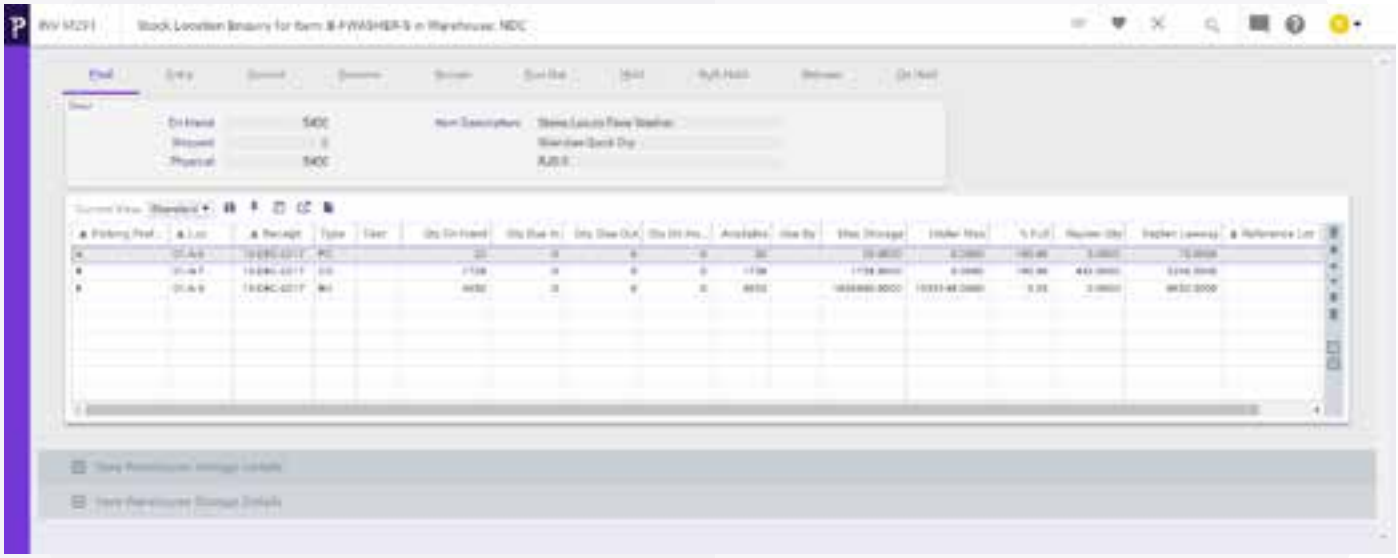
When you empower your warehouse staff with electronic and bar code processing, you can lower administration costs, eliminate errors in standard activities (such as picking), and streamline the information flow within your system.

Pronto Xi Scanpack

Uses barcode technology to enable you to increase the accuracy of warehouse inventory and communicate the contents of shipments to your trading partners.

Pronto Xi Catalogue

You can define thousands of items from your suppliers' catalogues and store them in Pronto Xi Inventory, whether they reside as inventory or not.



Track the exact location of all items within the warehouse

Pronto Xi Warehouse Management System
Achieve greater efficiency automatically

Pronto Xi Warehouse Management System maximises warehouse throughput and customer service levels by intelligently controlling movements of inventory into, around and out of the warehouse.

Among its many functions, Pronto Xi Warehouse Management System (WMS) facilitates:

- Multiple bin locations per item
- Flexible three-dimensional (3D) warehouse layouts
- User-defined location types
- Unit, carton and pallet storage
- Efficient picking location selections
- Optimised picking paths
- Intelligent top-up, replenishment, and putaway routines
- Storage zones

The WMS module is fully integrated with other Pronto Xi modules, including Inventory, Purchasing, Sales, Scanpack, RF and Manufacturing.

Your warehouse, your system

Each location within your warehouse is specified in a three-dimensional, coordinated system, giving you total flexibility in the description of your warehouse layout.

Optimal picking paths can also be specified to guide the picker or replenisher through the warehouse in the most efficient sequence. User-defined locations are supported, including Carton Line Storage (CLS), carousel and manual pick locations.

For each item, you can set up as many carton and pallet storage locations as you want, specifying minimum and maximum picking quantities for each location. Inner cartons are also supported.

There is the flexibility for your Warehouse Manager to select and prioritise orders to be processed. Orders may be produced in batches corresponding to one delivery from a designated pickup point in the warehouse.

In addition, a consolidated picking slip can be produced to optimise the process of picking orders, with items sorted according to the most efficient path through the warehouse.

You've got total control

There are times when a rule needs to be put in place to a particular location to certain processes are adhered to. For example if there's a bulk location that should not be picked from.

Constantly replenished

Pronto Xi WMS includes a variety of intelligent top-up routines so you can define a threshold percentage at which a location should be replenished.

The system allows for:

- Two-stage replenishment
- Queuing of replenishments
- Allocation of replenishments to particular users
- Manual replenishments
- Pre-pick replenishments

A number of replenishment methodologies are also supported.

Automatically generated replenishments

At sales order release where shortages are identified, or at the inward putaway release to satisfy shortages of intermediate and pick bin locations.

Manually generated replenishments

Listed on a report or accessed by Radio Frequency units directly, and generated between bulk, intermediate and pick locations.

Multiple replenishments

Fulfilled as batches and carried out based on an optimum pick-and-drop path. Can be further prioritised using an ABC classification structure attached to the inventory master record of the item. The pick-and-drop operations can be distinct processes and carried out by different resources.

Forced replenishment

Replenishment can be done for a location that may not have reached its trigger point.

What's in store

The 'storage details' screen is where Pronto Xi WMS defines the attributes of stored items. Each item is set up with its packaging configuration. There can be five levels from single unit inner, multi-unit outer to pallet configurations.

The dimensions, weights, conversion factor and a Global Trade Item Number (GTIN) can be defined for each unit of measure used.

In addition, Pronto Xi WMS allows you to define preferred storage zones for each item, which it uses when the inventory location is allocated by an automatic putaway.

You can also define picking methodologies for individual items. For example, Pronto Xi may be configured to use First-In-First-Out (FIFO) as a picking methodology, although certain items may require the operator to pick based on expiry date.

The Location Enquiry screen delivers important location metrics for each stock item to enable better decisions at receipting, replenishing and putaway time. Calculations that deliver location storage capacities, replenishment points and location utilisation percentages enable greater insight and help achieve optimisation within the warehouse.

Neatly put away

Incoming inventory is set as 'awaiting putaway' by Pronto Xi WMS. It is not available for sale until it is moved to a location in the warehouse.

Putaway is a logical holding area for inventory awaiting allocation to a 'pickable' location. Returns from customers, inventory purchased for specific sales orders and returns to suppliers are allocated to 'non-pickable' locations.

Pronto Xi WMS can automatically allocate a storage location for incoming inventory based on the current location of this item, the storage type and its priority. Intelligent putaway routines produce labels showing the locations to be filled. Top-ups can also be performed as part of the putaway process.

Two methods of bin location controls are supported:

- Quantity-based
  The capacity is defined as certain number of base units, cartons, or pallets.
- Three-dimensional
  The capacity is determined by the height, width and depth

Goods can be split into appropriate pallet or carton configurations based on an item's storage details. Pallet tickets or labels, either with a barcode or not, can be produced at this point to allow more accurate inventory control and pallet tracking enforcement.

In the zone

Pronto Xi WMS uses different types of locations and optional zones, providing a flexible way to design your storage location.

Using attributes that can be inherited from the location type (eg. preferred pick method, replenishment level, picking path) or from the zone (eg. storage type, customer-specific location), a large variety of storage types and picking methodologies can be created, including:

- Pick bins
- Cold rooms
- Bulk locations
- Bulk stack with Last-In-First-Out (LIFO)
- Carton line storage
- FIFO picking
- Carousel
- Use-By-Date (expiry date)

Customer-dedicated zones can be used for reserving inventory, as well as for pre-pick work (eg. price ticketing). If desired, the movement of inventory into customer-dedicated zones can trigger related processes such as the printing of a trading partner's price labels. The entry of a sales order takes customer-dedicated inventory into account when calculating or displaying inventory availability.

Delivering on time

Pronto Xi WMS enables the maintenance of delivery requests with attached delivery dates and times. The system displays a real-time sorted schedule, showing available inventory ready to be despatched, with an indication of pallet size, the number of pallets or part pallets.

The schedule sorts the delivery requests into a date/time order and continually refreshes the screen to display up-to-date information. You can select to see either all orders awaiting despatch or orders by customer.

Picking the order

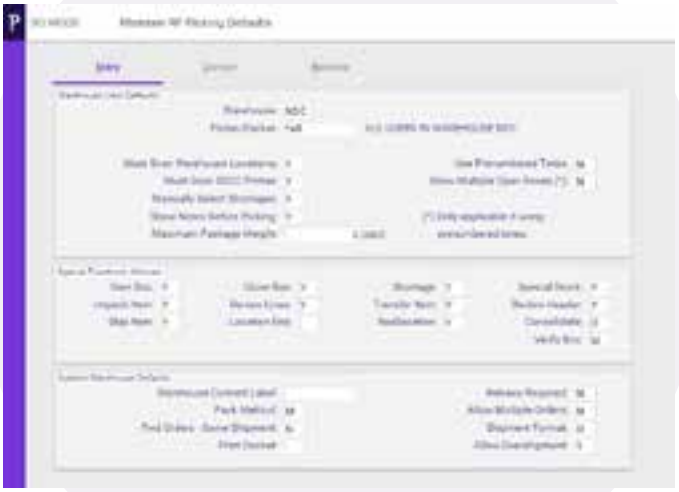
For order picking, Pronto Xi WMS uses the concepts of 'resources' and 'pools'. A resource can be an order picker, or in some cases, a packer. A pool is a logical holding area for released orders waiting for a resource to pick them up.

When you run WMS in paperless mode using Pronto Xi RF, the resources and pools are used to control the allocation of orders to the various picking staff. For example, pools can be prioritised to have an urgent picking order pool and a general picking pool.

Orders for picking are released to a pool or allocated to a resource and then picked by an appropriate resource. The criteria to release orders for picking include:

- Dates (due, earliest and latest delivery)
- Priority
- Item code
- Delivery zone
- Customer and customer type
- Bill to account
- Order number
- Carrier code
- Territory
- Customer reference

Picking paths and picking slips can be split by zone, allowing for different personnel to pick different areas using various methodologies for groups or individual orders. Picking paths can be as simple or complex as required.



Wave picking

Wave picking allows you to group multiple orders to be picked as if they were a consolidated requirement, and then delivers the consolidated requirement to a sortation process.

This methodology of picking provides a number of benefits including time savings and resource management.

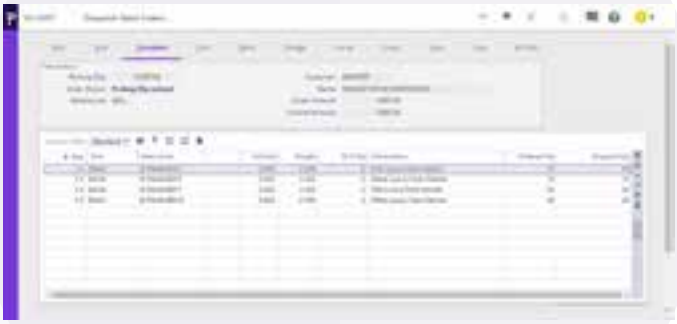
Smart despatch

Pronto Xi WMS caters for multiple despatch processes. Examples include individual or multiple order shipment, delivery and route planning, and pallet despatch.

Either single order despatch or multiple order despatch can be selected once the orders have been staged. The multiple despatch methods include drop sequence and serialised despatch. Labels and all other documentation can be generated at this time. Confirmation can be done manually or using bar-coding.

The user can specify whether each order must have a distinct consignment note or whether the orders should be consolidated on a single consignment note.

Carrier manifests can also be created, maintained and printed. In addition, the carrier code and delivery route can be used to select a group of orders totalling a required weight or volume (eg. to fill an appropriately sized truck).



Running enquiries

A range of sophisticated enquiry facilities is available to manage your operations and track performance. These include:

- Warehouse inventory by location or by item
- Warehouse profile view
- Full customer information
- Full sales order information
- Full purchase order information
- Warehouse resources

Additionally, you can access a range of inventory item enquiries using the Pronto Xi Inventory Enquiry Console.

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Pronto Xi Distribution Requirements Planning
Strengthen your closest relationships

Pronto Xi Distribution Requirements Planning allows you to set up and maintain a truly integrated supply chain.

At the warehouse level, you can plan the flow of goods across even the most complex network of satellite, branch and central locations. Demand from customer orders can be aggregated back to a central distribution centre for replenishment, based on a number of user-defined criteria.

As well as planning for the physical distribution of goods or materials between warehouses, Pronto Xi Distribution Requirements Planning (DRP) can also plan for their production and/or acquisition. For example, you can use the output from DRP to:

- Plan at the factory level through Master Production Scheduling (MPS) and Materials Requirements Planning (MRP)
- Automatically generate purchase orders
- Create warehouse transfer orders to facilitate replenishment

Optimised warehouse replenishment

As the number of item codes, suppliers and warehouses increases, so too does the complexity of supply chain management.

Pronto Xi DRP simplifies the supply chain by facilitating the efficient replenishment of physical inventory locations. It utilises a number of optimisation tools that take into consideration supplier priorities, transport costs, lead times, inventory targets and product cost.

Replenishment can be planned through the normal DRP network, or on an item-by-item basis for products supplied directly from the supplier to individual warehouses.

Time-phased distribution plan

Using a similar model to Materials Requirements Planning in manufacturing, Pronto Xi DRP provides a time-phased distribution plan with the same level of visibility across an entire network of warehouses, distribution centres and suppliers.

Access to source documents and inventory data is only a single mouse-click away from the central DRP enquiry screen.

Pronto Xi Advanced Forecasting
Predict your sales future

Pronto Xi Advanced Forecasting optimises your inventory management by providing an accurate means of predicting future demand for your products.

You want your forecasting system to be understandable, flexible, simple to use, accurate, robust and integrated. Advanced Forecasting meets all of these requirements.

A number of different factors can be considered for your forecasts, such as entered sales orders, goods shipped and inventory transfers (usage). Using this data, trends and seasonal fluctuations are identified and tracked.

Appropriate smoothing factors are also applied based on a 'best fit' method of forecasting, with algorithms including Triple Exponential Smoothing (Winter's Method) and Moving Averaging. With triple exponential smoothing, past observations are given exponentially smaller weights as the observations get older. This method provides better forecasts when there are expected or known seasonal variations in the data.

Pronto Xi Advanced Forecasting offers:

- Graphical displays
- Exception handling
- Steady, seasonal demand, averaging and trends

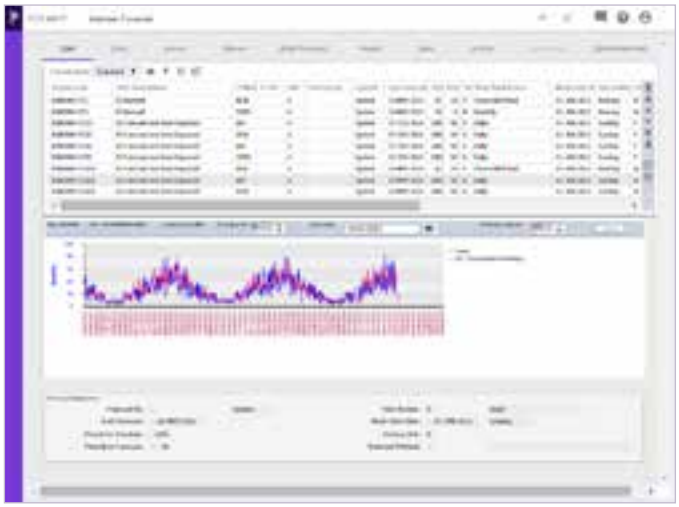
It is easy to see how a forecast matches the sales pattern

Understandable

With advanced forecasting, both calculated and manual forecasts are displayed within a chart on the same screen so it is easy for you to see how suitable any forecast method is to the pattern of sales of any item.

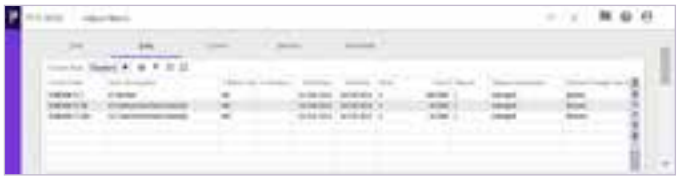
Flexible

You can choose daily, weekly, fortnightly, period, and monthly forecast periods.



Time periods down to daily can be defined

You can take known market events into account, to smooth out unusual events from the past and account for anticipated events in the future.



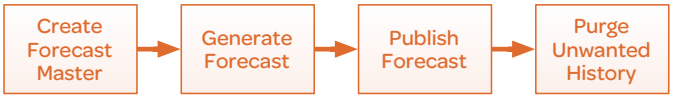
Manage market events

You can easily forecast a new item with no history by linking it to a similar item with history.

Forecast an item based on a different item

Simple

Setup and processing is quite simple and can be automated.



Robust

All of this is backed up by established statistical methods for forecast generation and selection.

$$MAPE = 1/_n \sum_{i=1}^{n} \frac{|x_i - f_i|}{x_i} \times 100$$

Integrated

The data you need to calculate your statistical forecasts comes straight from normal sales operations in Pronto Xi. Once the forecast is published the results are available to all the planning and reorder processes in Pronto Xi.

Additionally, BI Essentials contains a forecast model containing real time information that can be used for your reporting and strategic planning needs.

Staying on trend

A trend refers to any general change in sales over time. Pronto Xi Advanced Forecasting classifies trends in a number of ways, including:

- Steady demand indicates that the demand for the item is more or less constant over time
- Steady trend indicates that while demand may be increasing or decreasing, the rate of change of demand (the trend) is constant
- Seasonal demand indicates that, while demand may vary over time, demand is more or less constant for the same time period each year
- Seasonal demand with trend attempts to recognise a steady trend in sales superimposed over a seasonal demand
- Linear trend is the amount of increase (or decrease) that is the same over time
- Multiplicative trend is the percentage increase (or decrease) that is the same over time

Advanced Forecasting determines which of these trends is the best 'fit' for each inventory item by creating a forecast based on each trend and then comparing them with measured (actual) demand.

Measures of accuracy

Any forecasting system needs to be flexible enough to handle items that do not lend themselves to traditional forecasting techniques. Three statistical analysis techniques are used by Advanced Forecasting to determine the accuracy of the forecast:

- Mean Absolute Percentage Error (MAPE): The percentage by which the forecast differs from the actual sales achieved
- U-statistic: A comparison of the forecast with the 'naïve' forecast (which only uses historical data for the short-term horizon forecasting)
- Tracking signal: A comparison of errors in a forecast over time to determine if they are systematic or random

Four steps to better forecasts

The Advanced Forecasting algorithm incorporates actual data as it becomes available to refine the accuracy of its forecasts. There are four key steps:

- Modelling: Develop a model of the sales pattern for each item to be forecast, based on trends, seasonality and random fluctuation
- Forecasting: Using the model, new forecasts are generated
- Feedback: Actual data is added when available to refine the model
- Performance: The accuracy of the forecasts is assessed to further refine the model

Pronto Xi Electronic Data Interchange
Make sure they get the message

Pronto Xi EDI is a collaboration tool that facilitates the electronic exchange of information and trade with suppliers, partners and customers.

With a clear and comprehensive Pronto Xi data structure, along with a standard file format and integrated import/export mechanism, EDI allows you and your partners to effortlessly connect via a Value Added Network (VAN).

Have the flexibility and connectivity to extend and leverage your supply chain with customers and suppliers to achieve a common goal, as well as realise new operational capabilities. Among the benefits of EDI are:

- A fully auditable order trail
- Reduced transaction costs
- An easy-to-maintain system
- Increased visibility
- Reduced manual intervention
- Flexible invoice exclusion

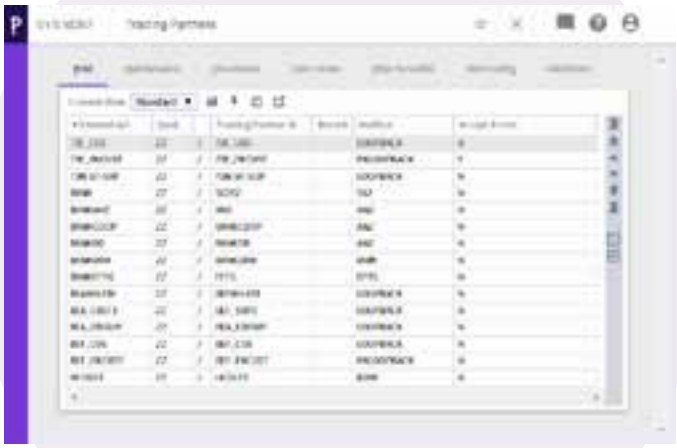
Connectivity

You can choose the VAN that delivers the most cost-effective solution for your business because Pronto Xi has specified standard format files that can be translated by virtually any VAN into an appropriate format and routed to your trading partner.

For example, a Pronto Xi file can be converted by the VAN into any standard requested by the customer, including ANSI X12, EDIFACT, OBI, OCI and XML schemas, and vice versa. The VAN controls communication between the parties, data manipulation and mapping, translation and transaction logging, with the flexibility to exclude orders from an EDI batch.

Documents supported by EDI include:

- Purchase Order (PO) incoming and outgoing
- Purchase Order Acknowledgement (POA) outgoing
- Purchase Order Change (POC) incoming
- Advanced Shipping Notice (ASN) incoming and outgoing
- Invoice incoming and outgoing



Connect directly with multiple trading partners

Trading partners

True flexibility and adaptability mean that EDI can fulfil the electronic trading requirements of a wide range of companies, including major retailers such as Coles supermarkets, Woolworths Limited, David Jones and many more.

Trading partner relationships can be easily defined and customised according to the trading requirements of your customers, suppliers or banks.

Pronto Xi Radio Frequency
Reading you loud and clear

Transform your warehouse into a paperless environment with Pronto Xi Radio Frequency. By replacing paper-based processes, you can lower administration costs, eliminate errors in standard activities such as picking, and streamline the information flow within your system.

Pronto Xi Radio Frequency (RF) allows you to electronically transmit orders from Pronto Xi Sales to your operators' handheld or vehicle-mounted terminals. It also includes options to automate a range of business processes. When used in conjunction with Pronto Xi WMS or Scanpack, the full range of Pronto Xi RF features includes:

- Incoming goods receipts of purchase orders, work orders, stock transfers, etc.
- Stocktaking
- Putaway
- Replenishment
- Inventory transfers, both inter- and intra-warehouse
- Store allocations
- Picking
- Packing
- Order despatch
- Stock and location enquiries

More efficient order picking

A picker can either pick from a pool, which is a holding area for released orders waiting to be picked up, or from an assigned list. When managing multiple warehouses RF users can also alternate between warehouses for the purposes of processing tasks such as putaways, replenishments and transfers.

Multiple order picking and packing pools can be created and ranked by priority. If the top priority pool is empty, Pronto Xi RF will automatically scan the next pool in the range. The picker is guided around the warehouse using intelligent pick-path information.

Tailored to suit your business

By integrating Pronto Xi RF with other Pronto Xi modules (such as Inventory, Scanpack and Warehouse Management System), it can be easily tailored to your businesses specific needs. Tasks ranging from stocktaking to more advanced automation such as picking, putaway and replenishment, are all facilitated with fully configurable RF menus.

For example, in a large warehouse operation, staff can be dedicated to stock putaway and replenishment tasks, while others are picking and packing orders. The configurable RF menu functionality gives the appropriate interface to each user.

Pronto Xi Scanpack
Keep track of stock day and night

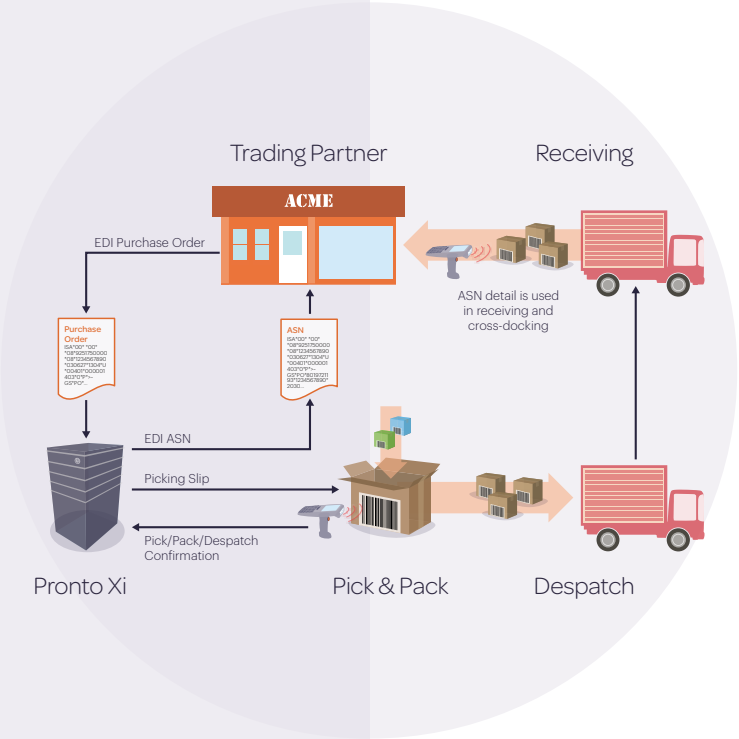
Pronto Xi Scanpack is an efficient way to deal with the picking, packing and despatch of goods, helping you streamline warehouse processes, increase accuracy of stock movements and enhance 'track and trace' visibility.

Large numbers of items, cartons and pallets can be scanned, tracked and managed via barcode technology, with automated printing of barcode packing and Serial Shipping Container Code (SSCC) labels. Capturing carton and pallet content information reduces errors and increases the accuracy of order fulfilment.

Typically, orders are managed in the following way:

- EDI purchase orders are received from customers with the required quantity and price of each item
- Purchase orders are converted into sales orders within Pronto Xi per store or distribution centre
- The required quantity of each item is packed and validated
- Upon completion of a sales order, or when the carton is full, the carton size code is entered and a serialised label is printed
- The carrier, consignment details, despatch date/time, expected arrival date/time and transport reference are all recorded
- Total order weight and volume are calculated (but can be overridden where needed)
- Despatch documentation is created and a shipment invoice is printed
- SSCC details are sent back to the customer in an EDI ASN

Scanpack supports industry standards and is integrated with the Pronto Xi Inventory, Warehouse Management System and Financials modules.



Pronto Xi Catalogue
Keep up to date with your suppliers

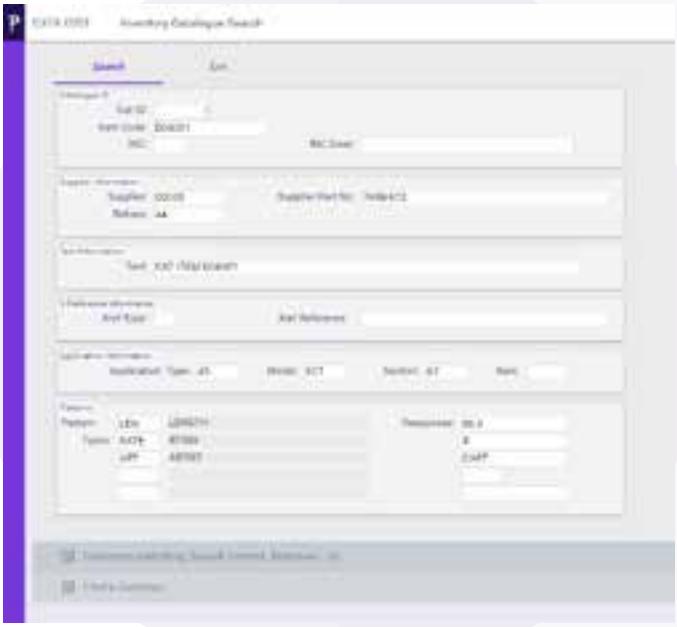
Pronto Xi Catalogue holds thousands of catalogue items that may or may not reside as inventory items in Pronto Xi Inventory.

Items can be stored as formatted or unformatted text and can be cross-referenced to other Pronto Xi objects. This allows searching via inventory enquiries with the option of dynamically creating them as normal inventory master records.

Each catalogue item can hold virtually unlimited information, including technical product specifications, supplier or manufacturer information, prices and part numbers.

Pronto Xi Catalogue supports the creation of supplier contracts linked to multiple catalogue items. Once the contract is activated, the agreed prices and contract numbers are written back to the individual companies and the agreed supplier can be given priority one status.

Expiry dates can be set for each supplier contract and reports are available to assist the review of existing and potential contracts and their details.



PRONTO Xi

Asset & Facility Management

Simplified services

Asset & Facility Management
Contents

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.

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.

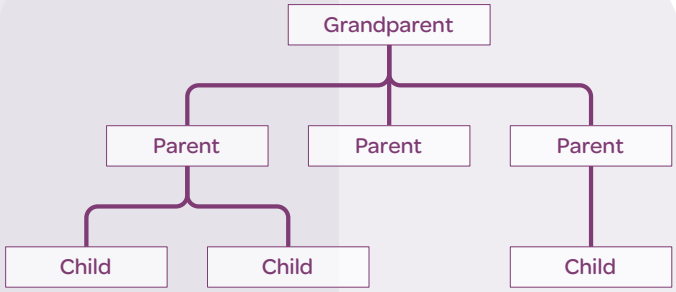
Close-out rules

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



Grandparent tree

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

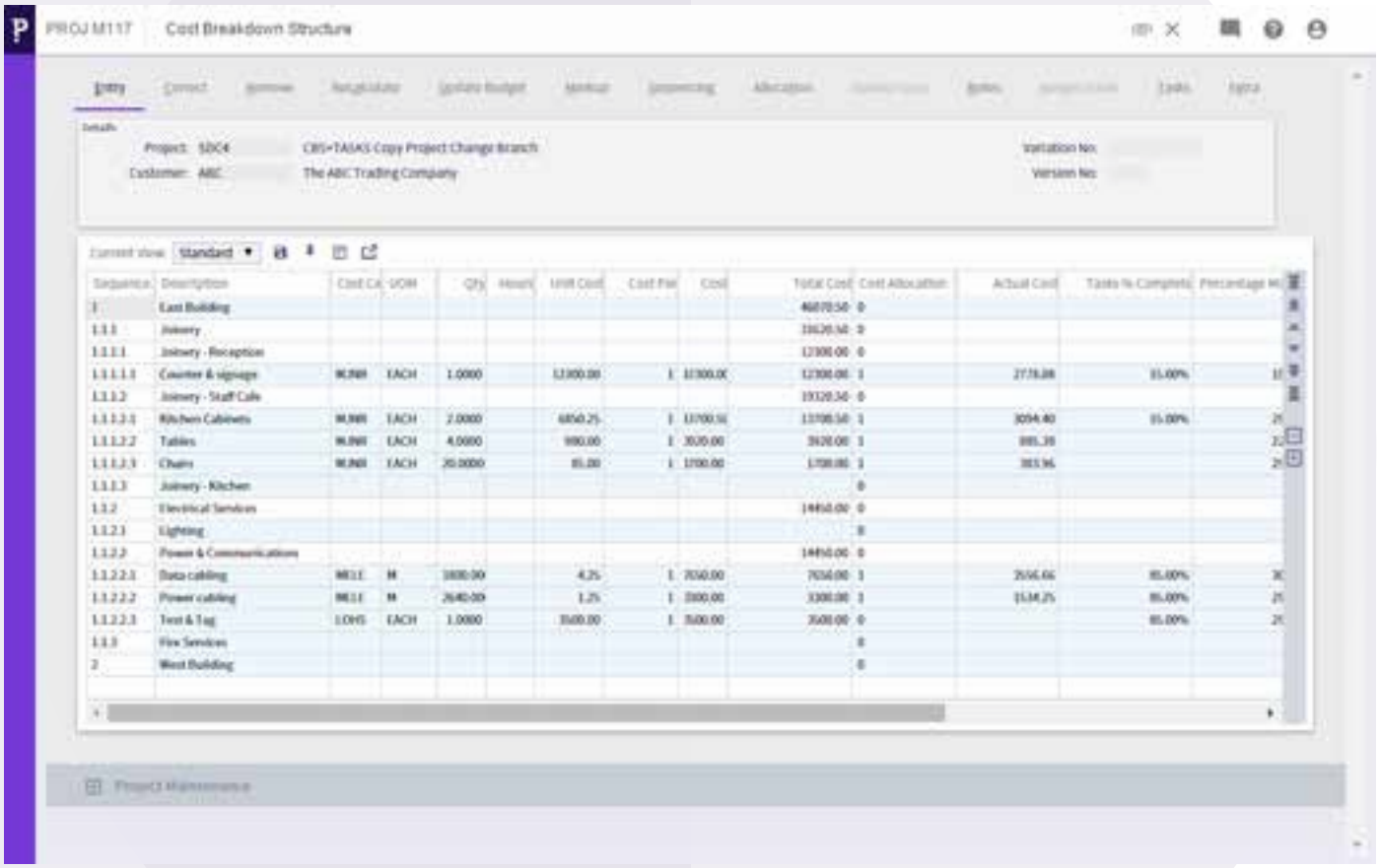
There are various ways you can incur direct costs against a project:

- 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.



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

Project Tasks

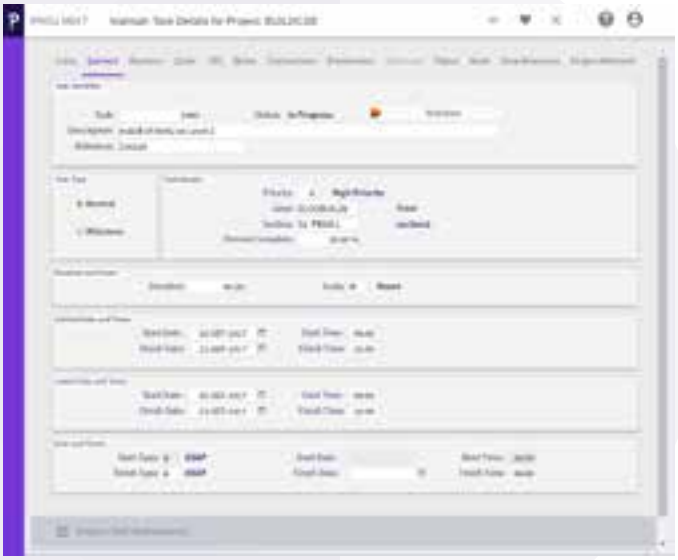
Project Tasks provide Project Managers with greater ability to manage projects by activity and duration. By attributing a Task to a specified element within the Project Cost Breakdown Structure (CBS), Pronto Xi Project brings budgeted cost estimates together with activity details necessary to get the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



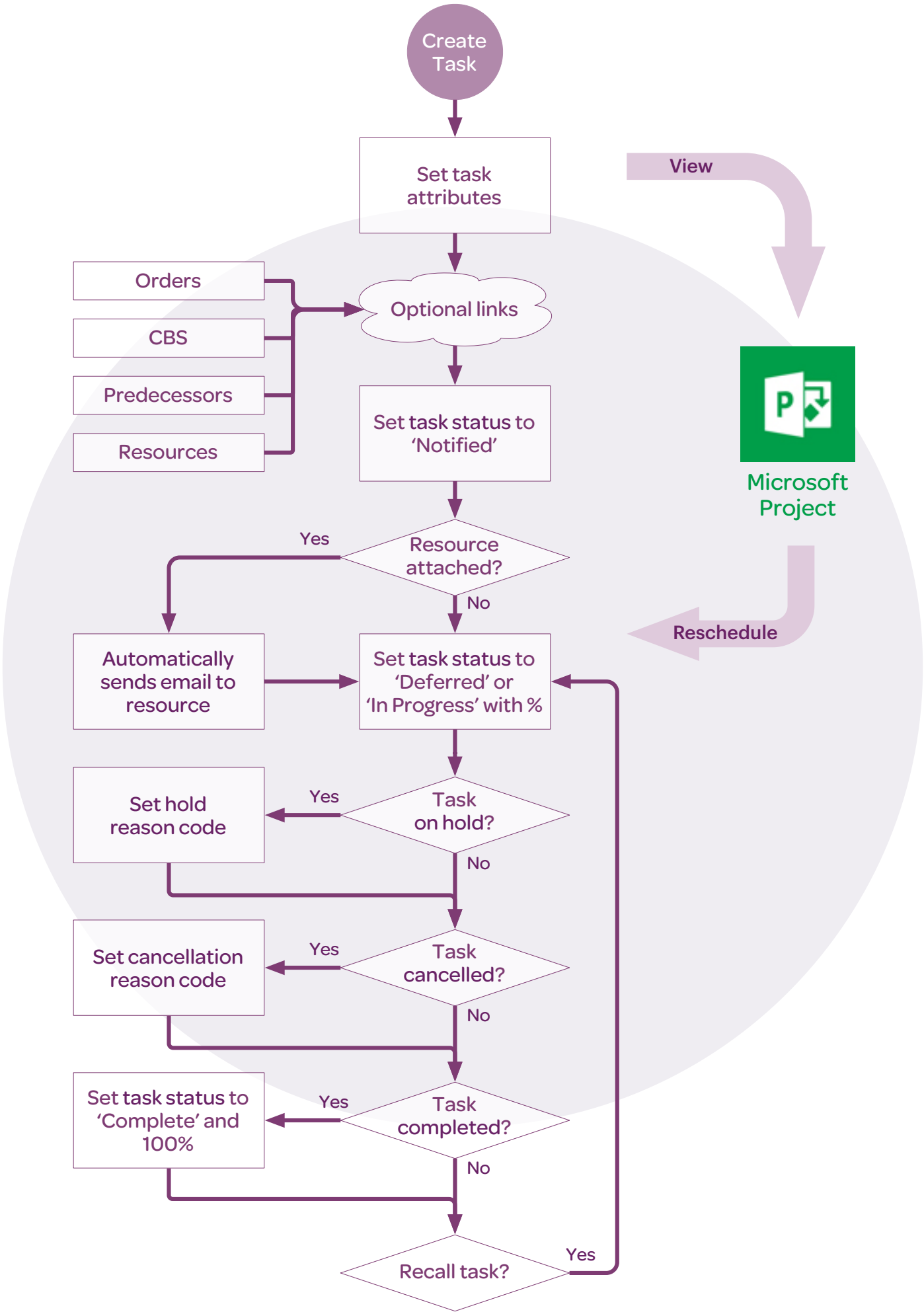
Plan and execute project delivery in line with critical milestones with Project Tasks

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

Create customer claims at any stage of a project

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.

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.

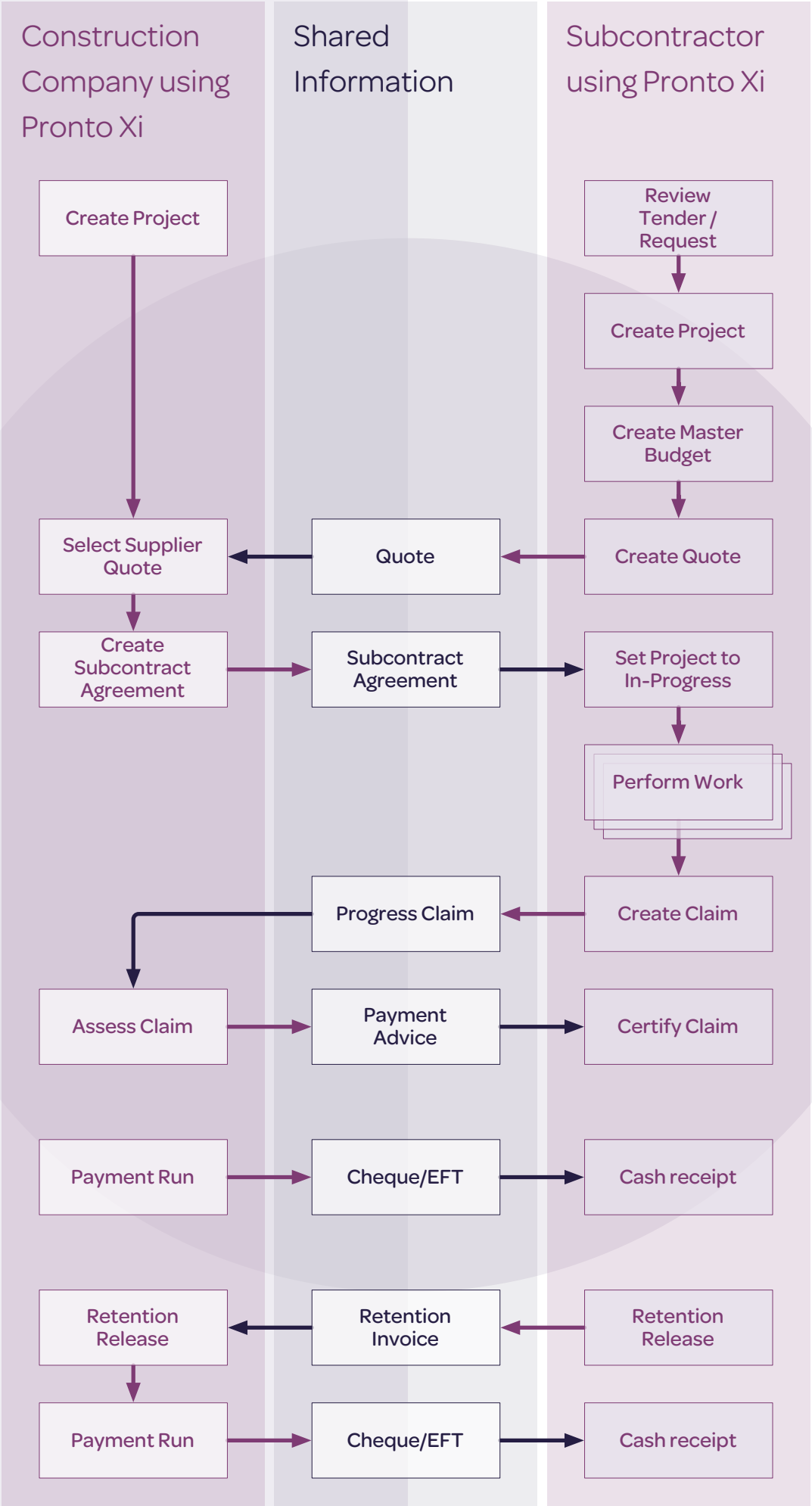
Sub-contractor retention release Held retentions can be released by the project manager at any point in the lifecycle of a sub-contractor agreement. Any retained funds are held in a separate general ledger account and when they are ready for release, Pronto Xi will automatically create a taxable payment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

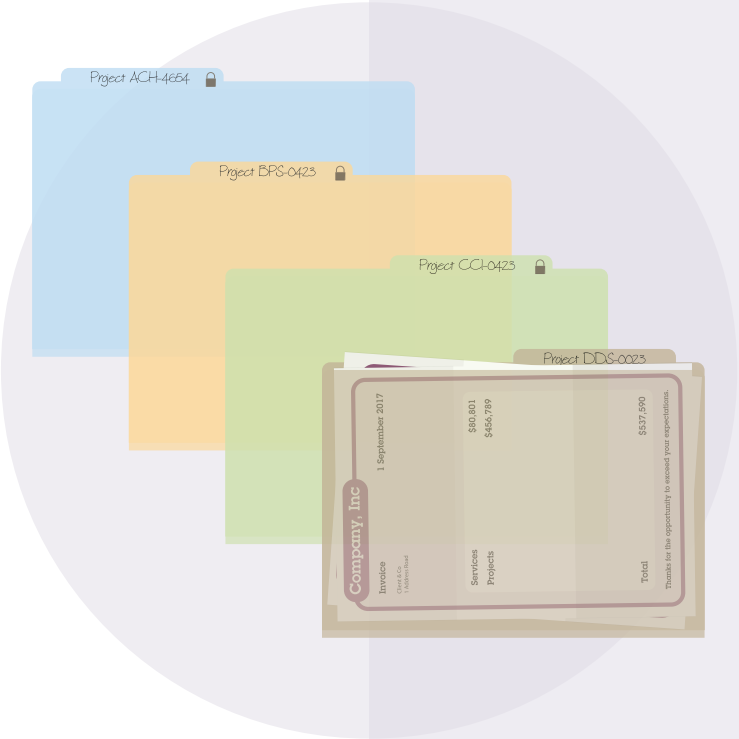
Project Manager Limits enable you to set the amount (in budget or contract value) that a manager controls at the different stages of an individual project. You can also set an in-progress limit but not a completion limit if desired.

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:

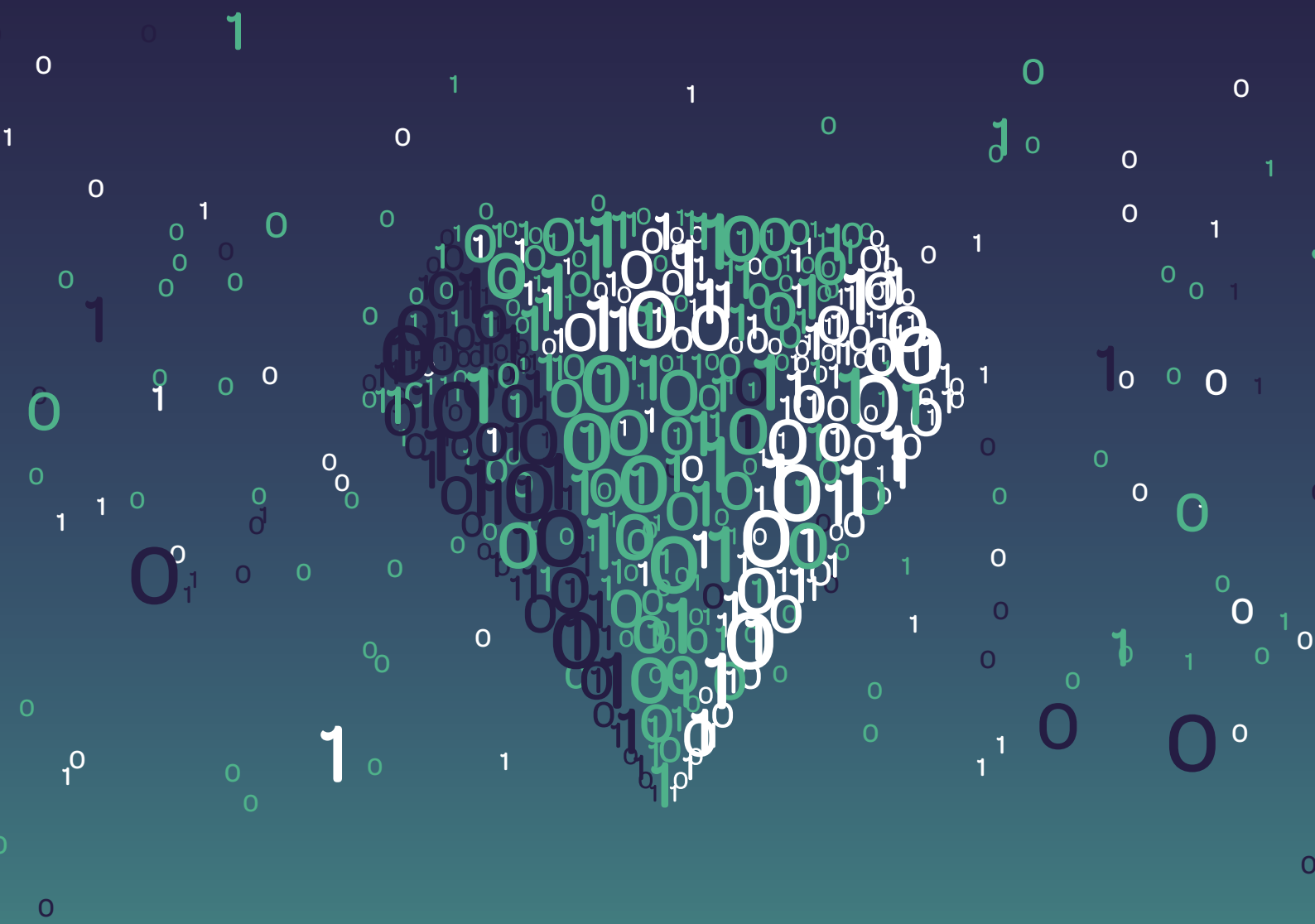
- Go/Win factor
- Build a detailed Cost Breakdown Structure to capture tender-related costs
- History of changes to tender
- Notes associated with tender or prospect
- To Do Register itemises responsibilities and timeframes
- Forecasting and phasing of sales and margins
- Tender and prospect reports

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

PRONTO iQ

NEXT LEVEL ANALYTICS

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.

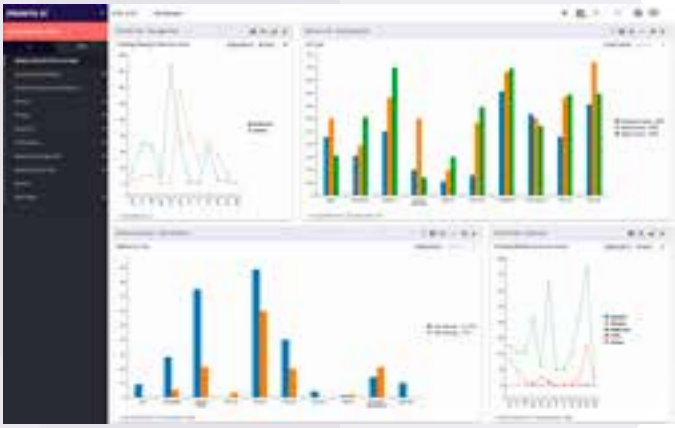
Intelligence

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.

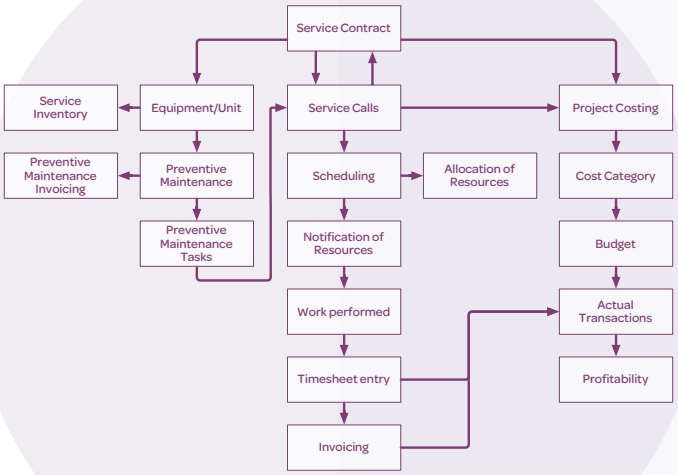
Contract on-hold and billing on-hold

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

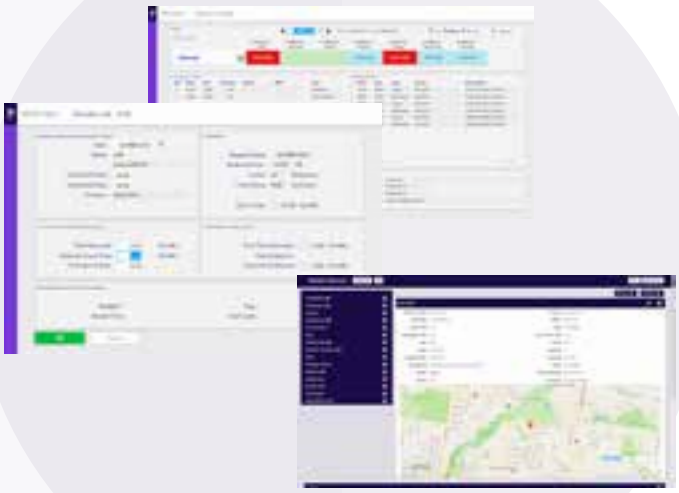
Estimated travel time is a notional representation of travel time to site, based on the Time Zone table. Both Resource Management schedule view and Service Scheduler will display the travel time and then the working time. Google Maps™ licence is available separately.

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

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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.

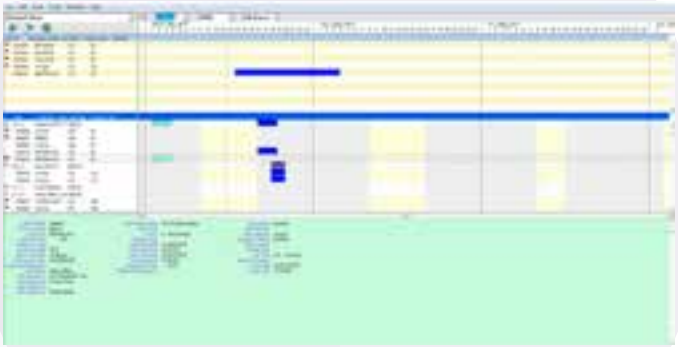
Pronto Xi Service Scheduler
Good call

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



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

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

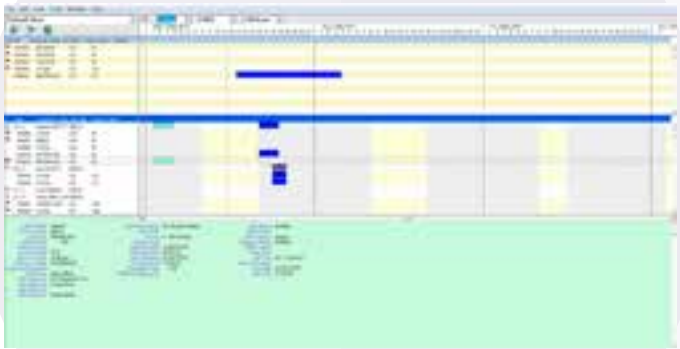
With its user-friendly design, dispatchers will find it quick and easy to allocate calls. Calls can be viewed by skill requirement and matched to engineers with the appropriate skill-set.

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.

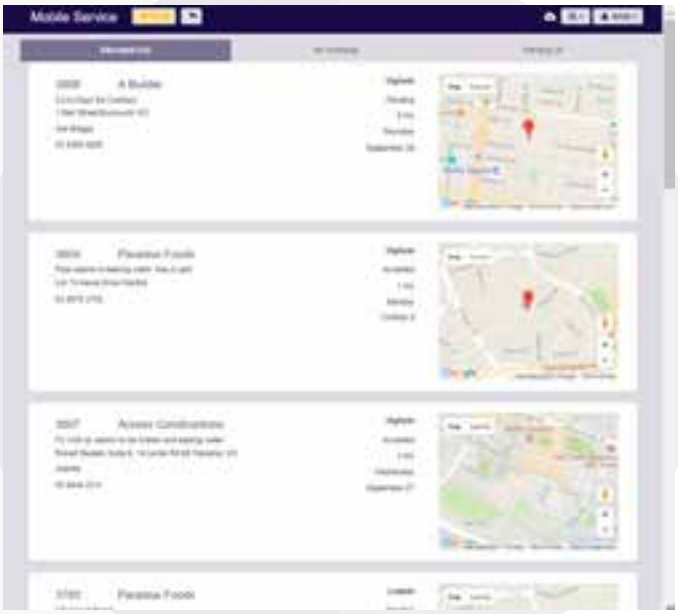
Fast in the field, fast in the office

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

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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.

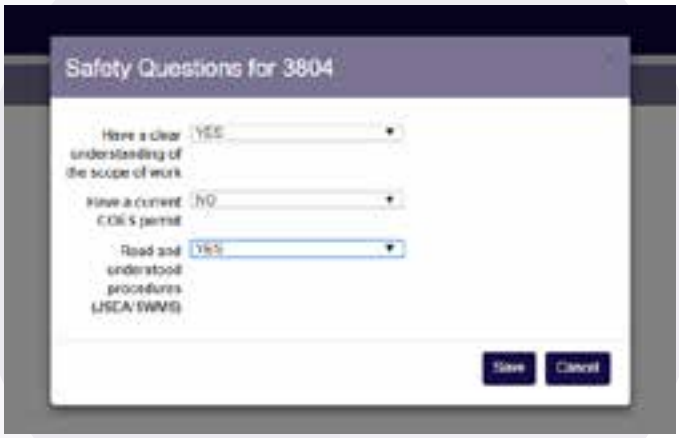
On the road or in the basement

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 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.

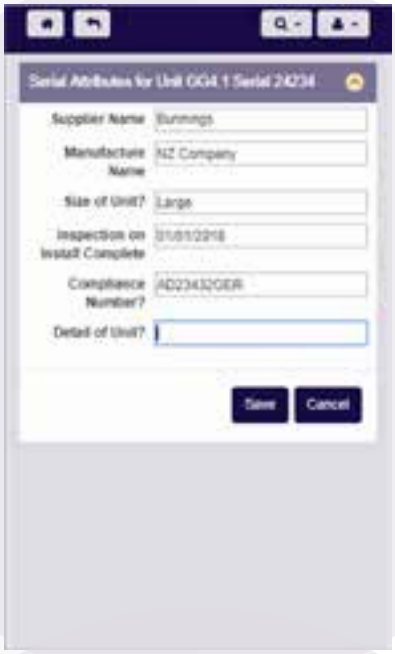
Smart and easy

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.

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



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.

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

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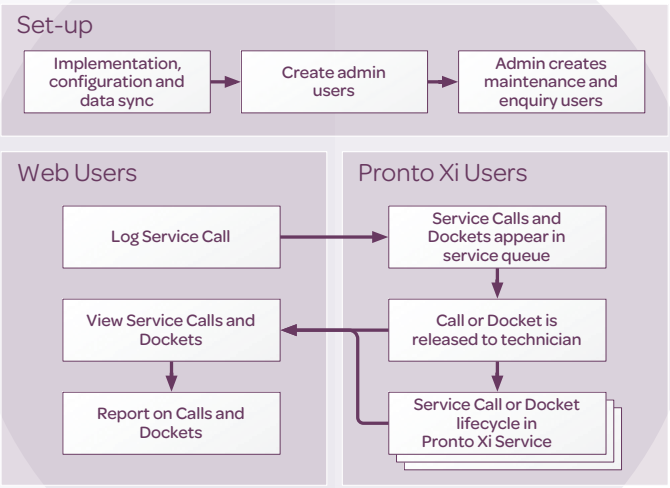
Pronto Xi Service Connect
Stay on track

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



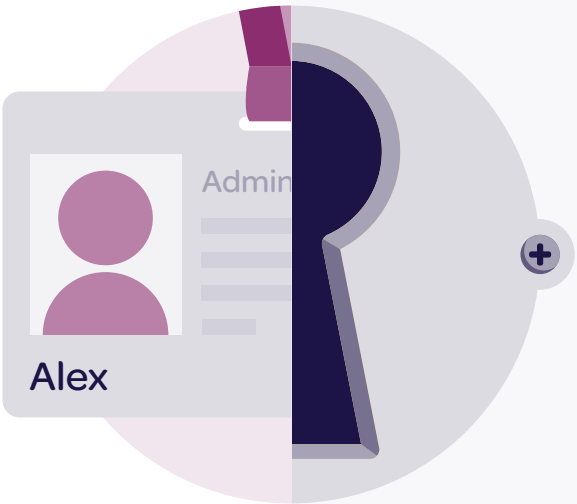
Service connect workflow

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 rotable 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 rotable item is one of the components of the repair (the repair could include multiple items of which the rotable item is just one of many)
2. The repair of the rotable 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.

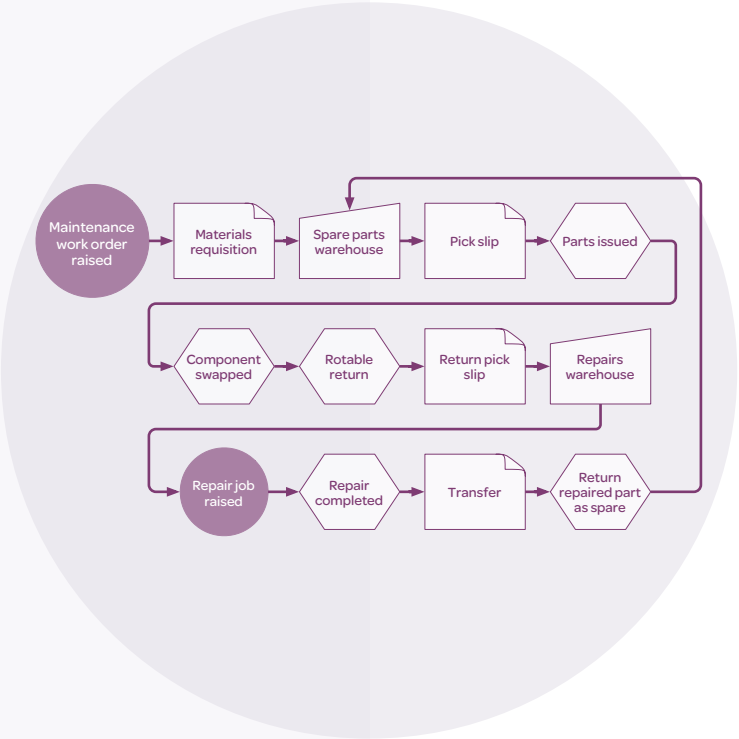
The plant item is quickly back to being productive and the component can be repaired over a more manageable timeframe, or sent out to a 3rd party for repair.

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.

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.

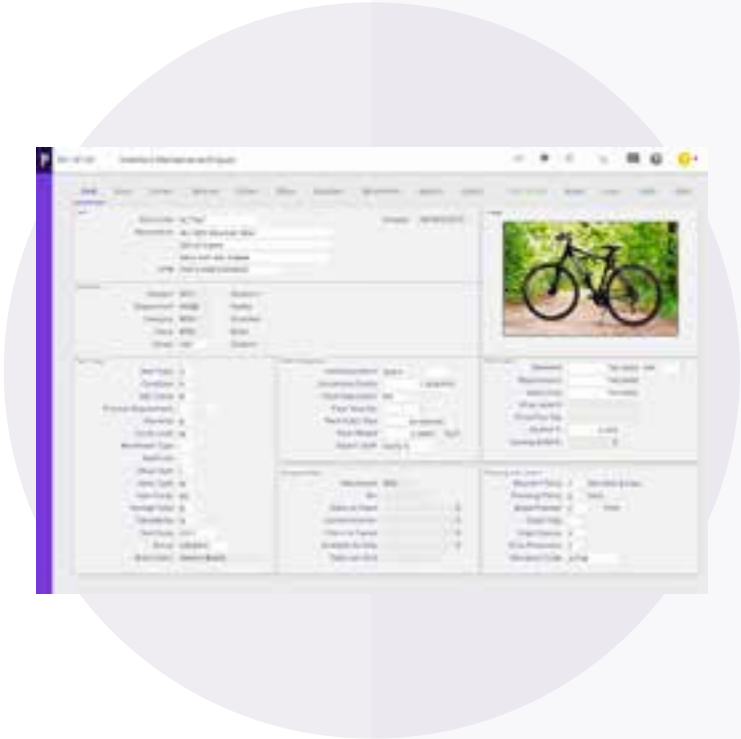
Work order priorities

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 rotable 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.

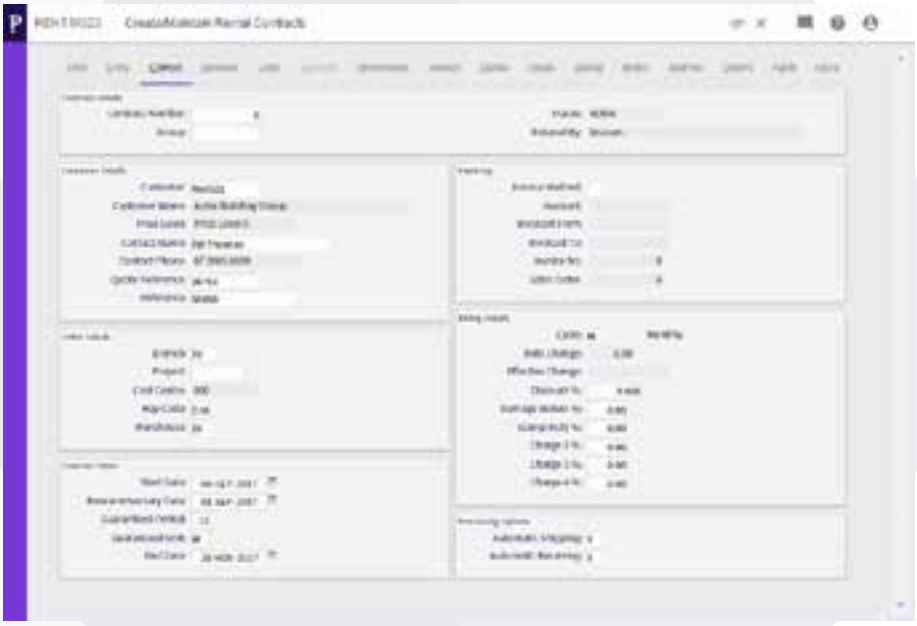
Pronto Xi Rental
Hire power

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



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

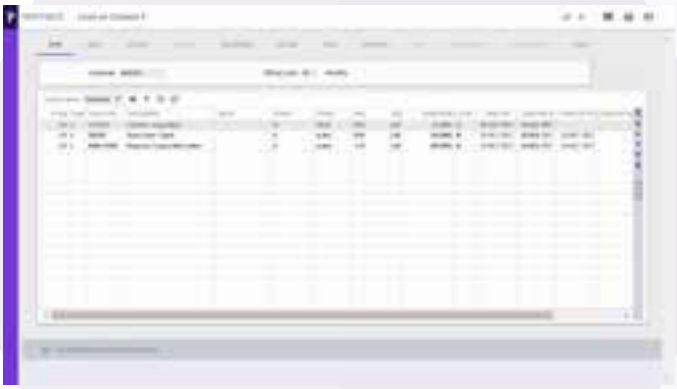
Financials

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.



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

Charges

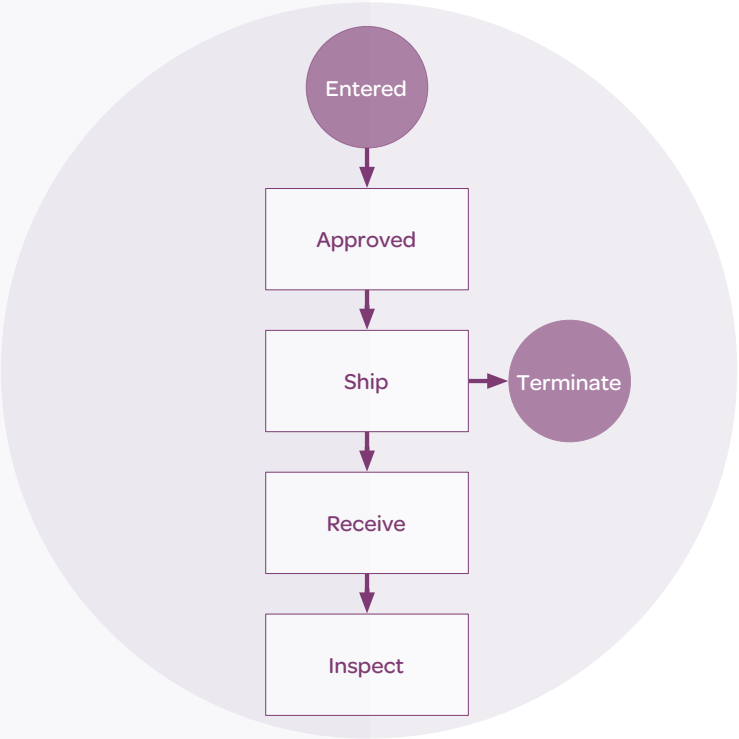
An extra charge (eg. a physical item, an attached service such as transport or installation, or simply a cost incurred) associated with the rental of a unit is linked to a particular unit on the contract line and is terminated from the contract at the same time as the unit. These charges can also be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

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.

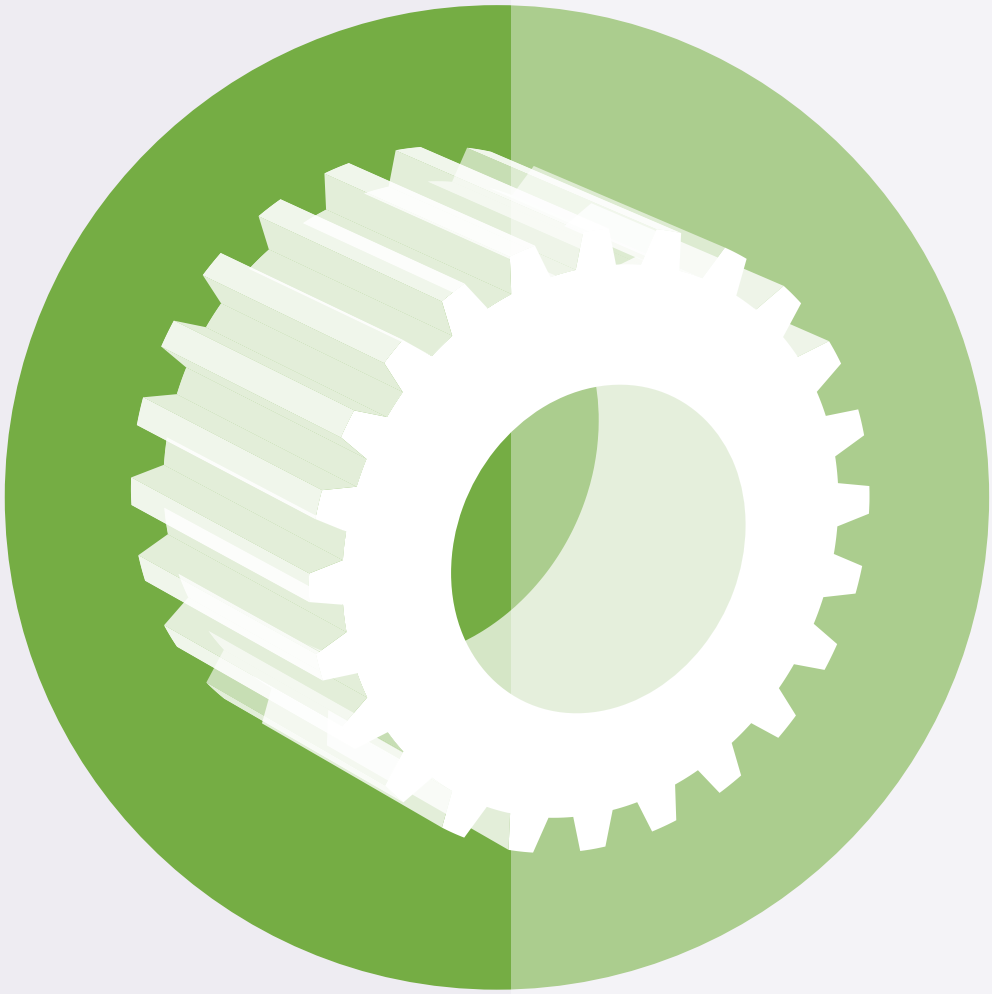
Payment reminders

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.

PRONTO Xi



Manufacturing Management

Make more with less

Manufacturing Management
Contents

Manufacturing Management
Make more with less

Take control of quality with our flexible suite of manufacturing tools, designed to cater to almost any industry. From trimming the fat on the factory floor to bulking up production volume, you can ensure your operations are ship-shape.

Plan your production properly with paperless reports of manufacturing resources and raw materials, and comprehensive feedback on consumption and production results.

Test, record and compare purchased and manufactured products against private and government specifications to make sure you're always dealing with the best.

View your entire operations at a glance to maximise your manufacturing resources to reduce product cycle time and meet your deadlines with ease. Support continuous improvement and make sure you meet your certification requirements through tighter process control.

Analyse the performance of your Manufacturing processes using the integrated Pronto Xi Intelligence functionality. Access a range of prebuilt reports or develop your own across Bill of Materials (BOMs), Master Production Scheduling (MPS), Material Requirements Planning (MRP) and Work Orders to ensure you have the information available when you need it most.

Made to measure

Manufacturing processes can vary greatly between industries – and even within the same company – as products pass through various production stages, all requiring different planning and control methods.

Pronto Xi Manufacturing Management modules have the flexibility to support most manufacturing processes, including high-volume production, lean manufacturing environments and mass customisation.

All of the modules also integrate seamlessly with other Pronto Xi modules, providing a comprehensive yet focused view of your business.

Pronto Xi Shopfloor Manufacturing offers a high degree of management flexibility for your shopfloor. You can have Bill of Material (BOM) maintenance with various methods of processing and recording production as it moves through the factory.

The Manufacturing Planning sub-module provides tools such as Master Production Scheduling (MPS), Material Requirements Planning (MRP) and Capacity Requirements Planning (CRP).

Pronto Xi Manufacturing Scheduler offers high visibility of workload versus available capacity and allows you to manually or systematically manage sequences and optimise work.

Pronto Xi Laboratory can improve your manufacturing quality management process by allowing you to record test results accurately and manage product grades efficiently.

Pronto Xi Quality Management supports continuous improvement, tighter process control, increased auditability and certification requirements.

Pronto Xi Shopfloor Manufacturing
Trim the fat

Keep your manufacturing operations in shape, whether you're planning to treat them lean or looking to bulk up high volume output.

To allow for a high degree of flexibility, Shopfloor Manufacturing includes a sub-module called Manufacturing Planning. Together, these modules will streamline your:

- Product data management – Item control, single and multiple BOM, routing, work centres, product configurator, kitting
- Shopfloor control – Work orders, production feedback, alternative routings, subcontract operations, costing and general ledger posting
- Manufacturing processes – Make to Stock, Repetitive, Batch, Make to Order, Assemble to Order, Configure to Order, Engineer to Order
- Planning – Materials, capacity, exception reporting, subcontracting, sales and operations planning, Planning BOMs, Super Bills, rough-cut capacity planning
- Quality control – Traceability by lot, batch and serial number
- Costing – Standard, average, actual, First-In-First-Out (FIFO) and more

Manufacturing workflow

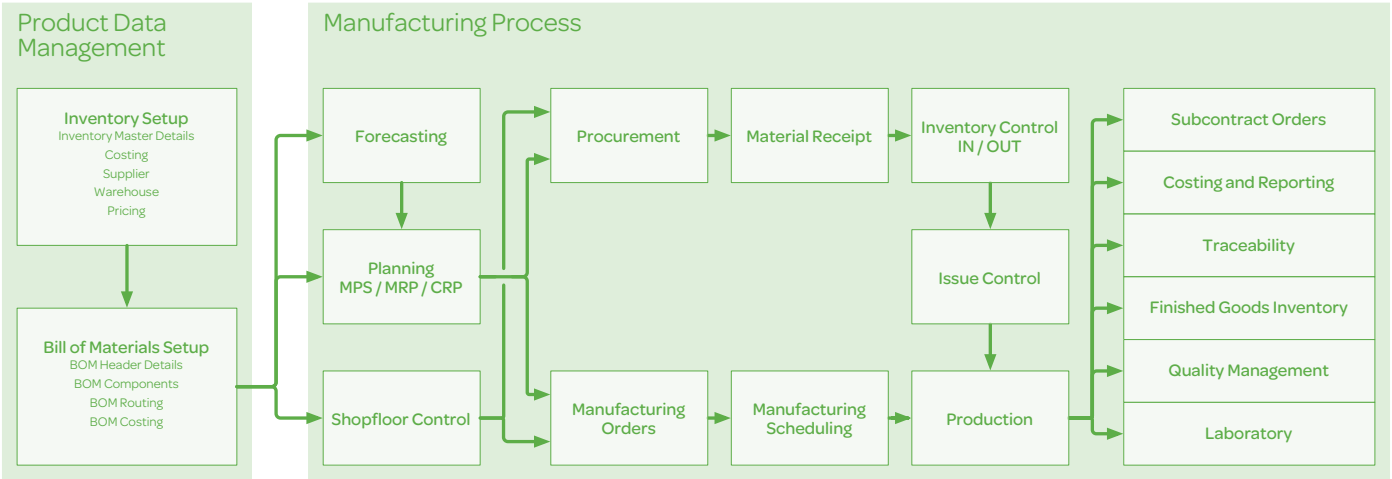
Shopfloor Manufacturing adapts easily to different production environments. This is because MPS, MRP and CRP (as well as Sales and Operations Planning using Planning BOMs and Super Bills) all support Make to Stock operations.

To support lean manufacturing processes, production can be controlled with or without work orders. Raw materials usage is controlled through traditional stock issue functions, automatic back-flushing of materials, or any combination of these.

Production results can be captured in real-time using bar-code readers, radio frequency (RF) units, or via traditional desktops. Multi-level batch, lot and serial number tracking are fully supported throughout the entire system, as well as external time and attendance model integration.

Pronto Xi provides sales order kitting and manufacturing of kit items, as well as a powerful configurator module, so Make to Stock, Make to Order, Assemble to Order and Mass Customisation operations are all supported.

Choose your kit items from a predefined list, and have them shipped as a kit or, after some assembly, a finished product.



Manufacturing workflow

Product data management

A manufacturing system is controlled by the characteristics of the individual item master and associated records. Items can be set as 'normal' saleable inventory items, manufactured products, raw material (not for resale), kit, labour, special or indent.

Planning parameters determine the replenishment algorithms for the MRP or reorder system, and minimum inventory settings provide separate replenishment levels by warehouse. Product lifecycle management is performed through a number of condition flags and time periods.

Item control includes lot, batch and serial tracking data. Extra detail records store other crucial information such as export details, chemical or HazChem classification and production drawings (references).

See all information related to the bill of materials, including descriptions, costing, versions, planning details, routing details and more

Bill of Materials (BOM)

Pronto Xi Bill of Materials supports up to 50 levels of sub assembly bill structures required to produce the parent assembly, displaying quantities of each of these items and managing costs, work centres and routing processes by Warehouse.

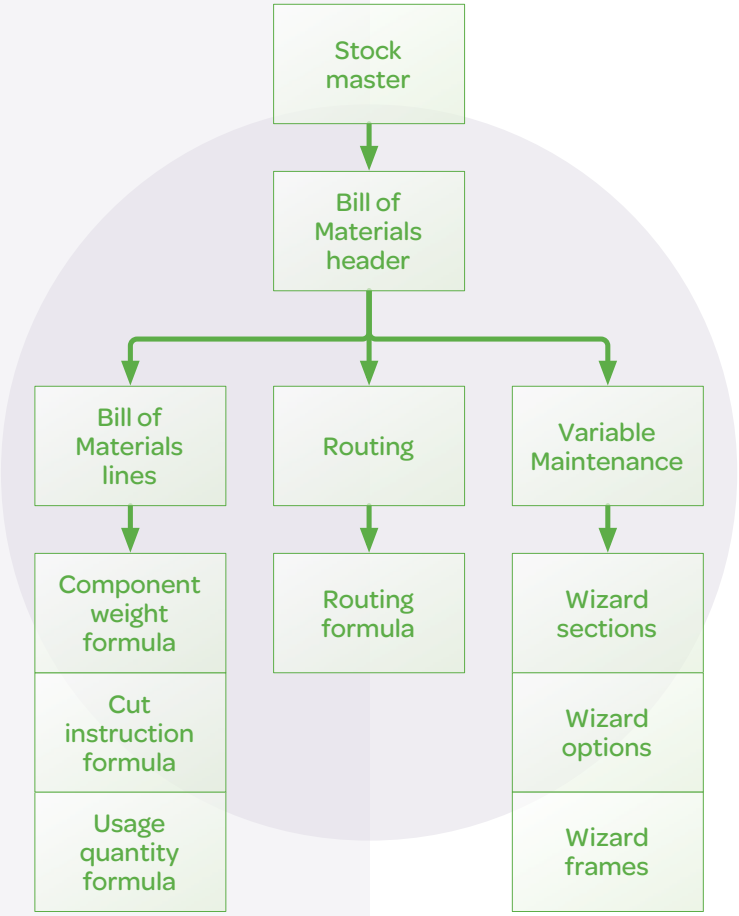
Different types of bills can be built to meet product lifecycles – from planning to configured to super bills – that manage all variations of configurable products in Make, Assemble or Engineer to Order environments.

Create and store versions of the same bill from factory to factory, as well as version types. These can be managed through a combination of BOM effective date, version control, Engineering Change Order (ECO) or user-controlled flags. Pronto Xi will also handle designators, split-fills, calculated component quantities and other industry-specific solutions.

A BOM can be costed in different ways, including Standard Cost, Average Cost, FIFO and Warehouse Level. For added flexibility, you can vary the costing methods for different items so that, for example, Standard Cost may be set for a stock item whereas FIFO or Average Cost can be set for a warehouse item.

Furthermore, having the ability to add either fixed or average costs such as overhead operating costs per unit will improve accuracy of the true BOM cost.

In multi-factory manufacturing operations Pronto Xi delivers BOM Cost roll-up by production factory, and where the same BOM exists across multiple factories a cost simulation feature considers source warehouse mapping to ensure more accuracy across your production factories.



BOM structure

Routing, operations and work centres

These are the sequential steps, operations, equipment and the respective setup and run times required to make a particular product. This information, together with the associated labour and overhead costs, is used to support:

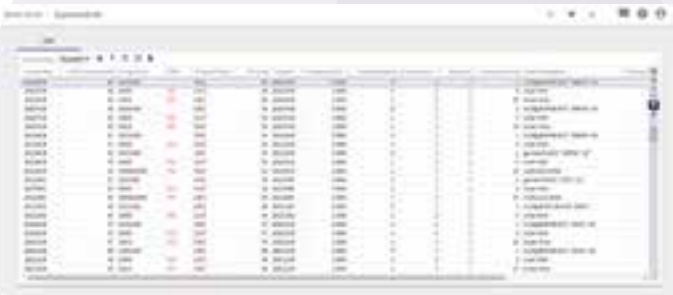
- Discrete manufacturing
- Rate-based production
- Parallel routing
- Multiple cavity tooling
- Alternative routing streams
- Subcontracting operations

If there is no production capacity reporting required, labour and overhead costs can be recorded via Labour and Special Items rather than using the Pronto Xi routing.

Bills of material and routings can also be maintained separately. You can easily define or change component information for bills or operation details with ease. A bill of material or routing can be created as new or modified based on an existing version. Revisions are time-stamped, so you can determine the latest for multiple revisions defined on the same date.

Exploded BOM view

A data grid view of exploded BOMs is available from the Product Data Management menu. This view shows details across all levels of subassembly components, making it easier to filter and sort your Bill of Materials.



See all information related to the bill of materials, including descriptions, costing, versions, planning details, routing details and more

Product configuration with Sales Configurator

Powerful configuration and kitting features support Make to Order, Assemble to Order and Engineer to Order industries. Straightforward features and option scenarios are easily implemented through a kit BOM.

The Pronto Xi Sales Configurator provides sales personnel with an easy to use, wizard based interface designed to step the user through item configuration, BOM creation and quoting. The Sales Configurator acts as a virtual salesperson allowing users to build a tailored solution based on a set of components and characteristics defined within the configurable BOM, the outcome of this process will be the generation of a Sales Order or Quotation Order. The Sales Configurator also allows you to create unlimited BOM variations based on a generic BOM, which is a Master Bill (or master recipe) that is designed for every possible permutation of an item, with built-in constraints for product and manufacturing processes.

When you issue a quotation for a configured item, you can build the item up-front or when the quotation has been accepted by your customer. This reduces the administrative requirement of managing the lifecycle of many discrete inventory items if the quotation is rejected.

Step through each screen to build unique customer solutions

Comprehensive dependencies ensure product configurations are complete and practical, which improves customer outcomes.

Tools are available to calculate materials usage and production times, including setup, costs and prices. Because relationships between various parameters are typically linear and arithmetic, you can use lookup tables to provide links for any unique parameter relationships that may exist.

This simplified approach takes away the complexity found in more traditional item configuration processes. You can navigate a series of radio buttons designed to prompt users for responses to pre-defined variables. Visualise each component of the configuration easily by utilising the free space available within the wizard screens to display a series of pictures throughout the stages of configuration.

The Sales Configurator is seamlessly linked to the Pronto Xi Project module, allowing users to create Projects and attach configured BOMs. Pronto Xi Engineer to Order (ETO) applies individual engineering design or significant customisation to satisfy a customer's unique specification. As an integrated solution, Pronto Xi Project can take on most ETO requirements, including the costing and tracking of all transactions for ETO work to be completed.

With in-built flexibility and general visualisation of all stages, Project achieves best practice within the industry. You can create orders from Manufacturing, Sales Configurator, or general Manufactured Bills of Materials (BOM), or simply raise general material requisitions or purchase orders.

Managing shopfloor processes

Work orders

Work orders are typically used to manage the planning, execution, raw materials consumption and feedback of production results.

In a lean manufacturing environment, Pronto Xi offers orderless and paperless recording of production, using back-flush methods for raw materials consumption and progressive crediting of labour and overhead 'hours earned'.

Special work order types and processes are available for disassembly-type industries and other special operations such as rework, repack and others.

Production feedback

Production results can be recorded using standard production feedback tools, or one of a large number of industry-specific production entry methods.

Review the progress of work orders, compare with the dates and details of the bill of materials.

Alternative routing

Shopfloor Manufacturing allows you to select a specific route from a predefined range on the day of actual production. Changes to the Route ID can also be made against an open Work Order, whether at 'Firm Planned' or 'Committed' status. This provides greater flexibility if quick changes to individual Work Orders are needed when production has not yet commenced. Lot, batch and serial tracking are supported for finished goods as well as components or raw materials.

Subcontracting

With the subcontracting functionality, you can raise purchase orders at various times throughout the lifecycle of the work order.

The completion of a subcontractor process can be controlled by either standard purchasing goods receipt or work order production entry.

The integrity of stock control of goods produced and payment for subcontracting services is fully preserved without any compromise to inventory integrity such as double-handling and creation of dummy items.

Manufacturing processes

Various processes make is easy to manage your Make to Stock, Repetitive and Batch Production functions, which together form a vital hub of supply chain management in the modern manufacturing organisation. These processes include:

- Materials planning via forecasting
- Sales orders and stock replenishment policies
- Automatic creation of work orders and purchase orders
- Initiating subcontract operations
- Creation of vendor schedules
- Capacity planning of actual production
- Release of shopfloor documentation
- Reporting of production results

Discrete manufacturing, rate-based production, parallel routing, multiple cavity tooling, alternative routing streams and subcontract operations are all supported. Other standard features include Make to Order, Assemble to Order, Configure to Order and Engineer to Order manufacturing.

Quality control

Traceability

Pronto Xi Manufacturing provides an extensive range of traceability tools. Manufactured goods, as well as purchased raw materials, can be tracked by manufacturing batch or lot. Raw materials and components can be lot-tracked by their purchase order number if required. Serial numbered items can be recorded and tracked at various user-controllable transaction points.

QA-hold, use-by date

Purchased or manufactured items can be nominated to require Quality Assurance (QA) inspection before formal acceptance into saleable items. Following QA inspection, items can be either fully or partially accepted, rejected or returned.

In many process industries, shelf-life is an important issue. Pronto Xi will automatically generate use-by dates for product labels and other documentation.

Costing and General Ledger posting

Manufacturing cost calculations and postings to Pronto Xi General Ledger can be controlled in a number of ways. Costs can be generated from standard costs, single and multiple BOMs and routings, or alternatively from actual labour and machine time reporting, posting actual cash costs to the work order, or processing timesheet records.

The General Ledger account structure can be user-defined to attribute costs and variances to a factory, department, item group or work centre. Any update of product costs and inventory will be handled according to the system cost selected by the user.

Manufacturing modules can be linked to Pronto Xi Payroll by recording the times from the work order against the employee code.

Pronto Xi Manufacturing Planning
Good making time

Pronto Xi Manufacturing Planning provides a range of tools that optimise materials and capacity planning over single or multiple sites, and match the level of complexity required by the business.

By using a combination of Actual Orders, Forecasts, Distribution Requirements Planning (DRP), Days Cover, or the Min/Max Replenishment Logic, Pronto Xi makes it easy to aggregate demand from a network of distribution centres.

Production Planning, MPS, MRP, DRP, Super BOMs, Planning BOMs and supply/demand data from the inventory and distribution system are used to create a list of planned work orders.

Once verified, planned work orders are automatically converted to a work order or purchase order in bulk, grouped by product or other operational requirements. MRP exception messages are generated by the system, while factory loading capacity and materials information can be displayed graphically via Manufacturing Scheduler.

Forecast material requirements and plan work orders with ease'

Production Planning (PP)

Production Planning, Super BOMs and Planning BOMs facilitate the sales and operations planning process. The Production Plan sets the overall level of manufacturing output and other activities to best satisfy the current and projected levels of sales and forecasts.

Production Plans can be entered by quantity or dollars at the planning group level, and exploded via a Super BOM and bill of resource to help establish and develop production rates, support plans for material procurements and workforce requirements.

Master Production Scheduling (MPS)

This is the anticipated build plan for critical manufactured items that drive the overall manufacturing plan. It includes the projected on-hand inventory and the available-to-promise quantity as represented by demand, forecast and backlog.

The MPS sets out the quantity of each manufactured item that you plan to manufacture each month, up to 12 months in advance.

A data grid in the MPS Maintenance/Enquiry screen enables sorting and filtering of MPS data. Filter on inventory fields such as Planning Group, Reorder Policy, Warehouse and Condition Code. Once filtered, you can save views and drill through to MPS results, including pegging details, receipts and exception details.

Rough-cut Capacity Planning (RCCP)

RCCP enables you to convert the MPS into requirements for key resources such as labour, machines, warehouse space and suppliers' capabilities.

Material Requirements Planning (MRP)

MRP plans the release of recommended replenishment orders at the appropriate date in the current working time bucket to satisfy the demand for items when they become due.

Planned work orders are a result of the time phasing of demand management and the net requirement for items is exploded through all levels of their BOM to determine the gross requirements at each level. Applying lead-time and adjusting for on-hand and on-order quantities at each level determines the timing and quantity of purchasing and manufacturing.

With MRP you can:

- Create planned work order requirements for components and sub-assemblies
- Produce a list of suggested purchases to satisfy the known demand
- Plan the completion dates for these work orders by using lead time
- Print released planned orders and exception reports

Capacity Requirements Planning (CRP)

CRP creates a detailed plan by department or work centre based on the constraints as defined by the factory/work centre calendar of resource availability. Techniques employed by the CRP process for producing a detailed plan of all open work orders and planned requirements from MRP are finite scheduling and infinite scheduling.

Pronto Xi Manufacturing Scheduler
Track and yield

Oversee what's getting done and who's doing it to make sure you've got the right hands in the right places.

Visual scheduling

Using a Windows-based drag and drop application, Pronto Xi Manufacturing Scheduler simplifies scheduling and planning for work centres where many jobs are processed simultaneously.

You can manage variations in the current schedule, see when priorities have changed (or a work centre is unavailable) and see the available options for resolution. Manufacturing Scheduler also provides visual warnings when work orders are late or when scheduling conflicts occur within a work centre.

Flexible planning tool

Manufacturing Scheduler is an electronic whiteboard scheduler used in conjunction with Pronto Xi Capacity Resource Planning (CRP). CRP information downloaded from Pronto Xi includes the calendar, work centre and work order data.

For each work centre, the operations can be moved to a new production slot with a simple drag and drop. Operations can be sorted based on multiple criteria. Once the order of the jobs is set, Manufacturing Scheduler automatically sequences each operation one after another.

Operations or entire work centres can be locked once the scheduling has been completed. Locked operations are taken into account according to your settings if you re-run Pronto Xi CRP.

Optimisation

As a visual management tool, Manufacturing Scheduler allows you to easily manage your workload to factory capacity constraints with the use of CRP. You can refine the timing of product batches during weekly production cycles and, for added flexibility, sequence and optimise work based on user-definable parameters.

Alternative schedules can be developed and saved as 'what if' scenarios before the data is submitted back to Pronto Xi where all relevant elements are updated.

Gantt view

All operations of a selected product can be sorted by the routing sequence in a Gantt chart format. In this view, operations can be analysed as per the work order routing sequence by displaying links between operations. This simplifies the maintenance and optimisation of production schedules.

Printing and reporting

Manufacturing Scheduler data (including routing sequence, work centre and work order data) can be exported to a Microsoft Excel spreadsheet template to report and print the production plan.

Manufacturing scheduler

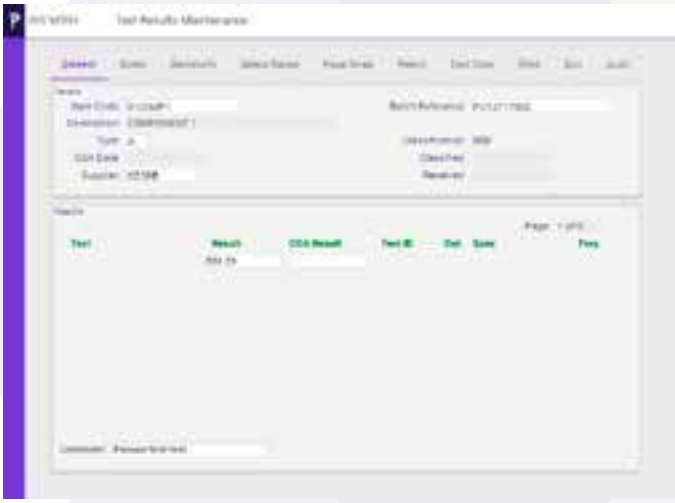
Pronto Xi Laboratory
Make the grade

Test, record and compare your purchased and manufactured products to make sure you're always dealing with the best.

Pronto Xi Laboratory gives you the power to make reprocessing decisions quickly and confidently.

Record and track quality or test criteria of purchased and manufactured products, and lower operating costs by identifying the lowest complying set of products for any given requirement. Grade tested product batches, then classify graded products depending on desired usage, release or future development.

Laboratory also creates official certification documents to product specifications for customers and government agencies.



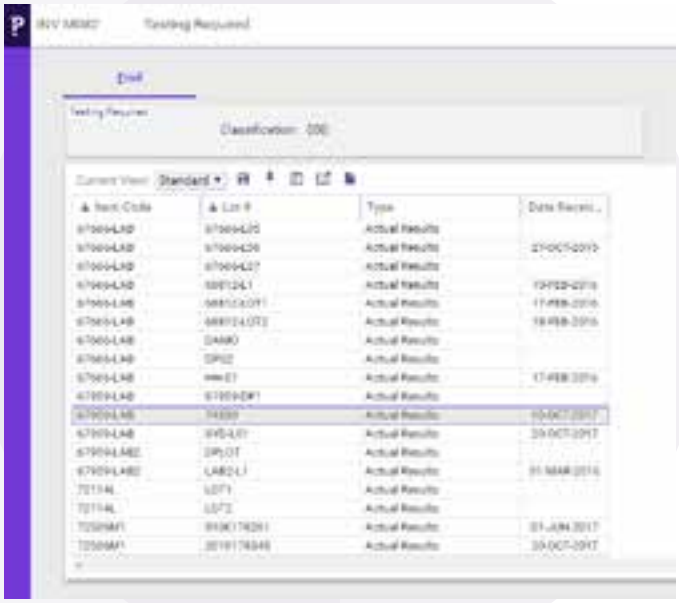
Test results

Laboratory makes it easy to handle numerous types of test results. If you are manufacturing the product, the test results are always 'actual' results.

For purchased products, results can be entered based on a sample or the Certificate of Analysis provided by the supplier. Actual results can be entered separately and compared against the supplier's sample or Certificate of Analysis. Grading or classification can be done based on all types of results.

As each batch passes through its test procedures, you can enter the results obtained along with related notes.

Once the test results are entered, the batch can be reclassified. If all classification criteria are met, Laboratory will automatically classify the batch in the highest possible grade. Reclassified batches are only added to stock and become available for sale if the new classification is flagged as usable



Audit

Classification changes, as well as test result changes, are fully audited.

Batches requiring testing

Laboratory provides a screen displaying all nonclassified lots and batches you have recently manufactured or received from your supplier. You can use this screen to edit test results and classify these batches.

Selection and despatch

When a sales order is processed from a customer requiring a specific grade, you can only select lots that meet the specifications for that grade or a higher grade.

Laboratory highlights the lowest possible complying batch that meets requirements so that higher-grade lots aren't unnecessarily selected or despatched.

Regardless of customer requirements, only saleable grades are available for selection during the despatch process.

Analysis certificates

Products that have passed your quality tests as claimed can be automatically issued with a Certificate of Analysis. The layout and test results that are printed on the Certificate of Analysis can be tailored to your organisation's needs.

Pronto Xi Quality Management
Quality control

Make sure your products survive with the fittest through flexible and comprehensive quality management procedures.

Pronto Xi Quality Management supports continuous improvement and quality management though tighter process control, increased auditing capabilities and certification requirements.

Management overview

Give your managers an overall view of the status of audits, corrective actions, suggestions and complaints.

Document register

Record and maintain documents with the Document Register. Although suitable for any type of document, the register is normally used to record internal documents. Details of a document recorded include its location on the network, who authorised it and which department is responsible for it.

Drawing index

Catalogue technical drawings, blueprints, files or construction details with the Drawing Index.

Details of the physical location of drawings and blueprints as well as where files are located can be entered and maintained. The drawings can be accessed over the network and opened with an appropriate viewer.

Technical library

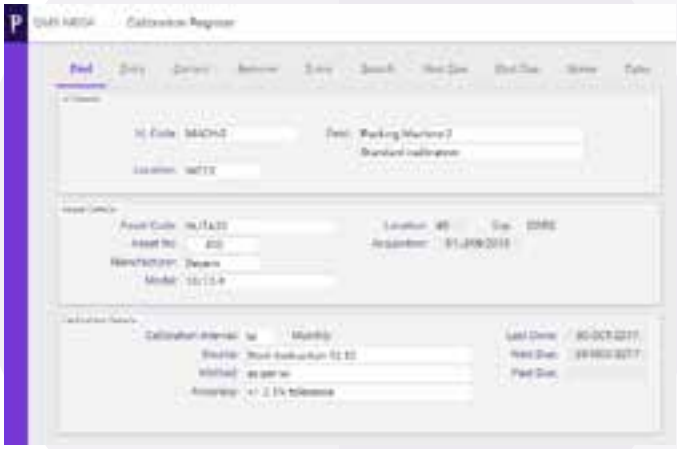
Record and maintain a complete library register of standard reference works, technical bulletins, magazines and periodicals and any other technical publication used by your organisation with the Technical Library facility.

Complaints Log any complaint or request for action – either received from a customer or generated internally.

Brief descriptions can be recorded with a complaint, along with the name of the department, or even the employee affected by the complaint.

If the complaint regards an inventory item, the item code may be entered so that the complaint records are specific to the one item. You may then enter detailed notes about the nature of the complaint for further action.

Complaints are linked to corrective action logs. Complaints can be reviewed by customer or by inventory item for Pronto Xi Accounts Receivable and Inventory. A customer invoice can also be flagged as 'in dispute' and a debtor complaint raised.



Help/Action list

A Help/Action list system allows you to review and maintain the Log/List/Corrective Action details. Logged problems are assigned to specific staff for action. When the complaint has been resolved, the resolution is recorded for future reference.

Using the action list, you can also implement an electronic 'suggestion box' and use it as a Corrective Action Request (CAR). A comprehensive reporting facility is also available.

Technical bulletins

Technical bulletins can be viewed, maintained and searched for issue by your organisation. This maintains a separate record of the bulletins you have issued, showing the date of issue, the date it became effective and the author.

Audit schedule control

As a part of your organisation's Quality Standard Certification, it is necessary to conduct regular audits of your procedures. With Quality Management you can schedule the audits as appropriate, maintain details of necessary corrective actions that have been identified, and then ensure each action is performed.

Calibration register

The calibration register makes it easy to maintain your equipment calibration records, with automated warnings if a calibration is overdue. You can specify how frequently calibrations are needed on each piece of equipment, the method to be used and the level of accuracy required.

Access to other quality facilities

Quality Management is integrated with other Pronto Xi modules.

Product batch/lot search

You can perform enquiries to search for and trace product batches/lots, and view and edit quality information for specific products. This includes information about products that have failed quality procedures and/or have been scrapped.

Engineering Change Orders

An Engineering Change Order (ECO) Register allows you to control the updating of a bill of material (BOM) or product specification through a formalised process. Instigated by a customer call or by service, manufacturing, or research and development staff, these specification changes are monitored and released for action via an approval process; therefore a complete historical record of all ECOs is maintained for future retrieval.

Vendor performance analysis

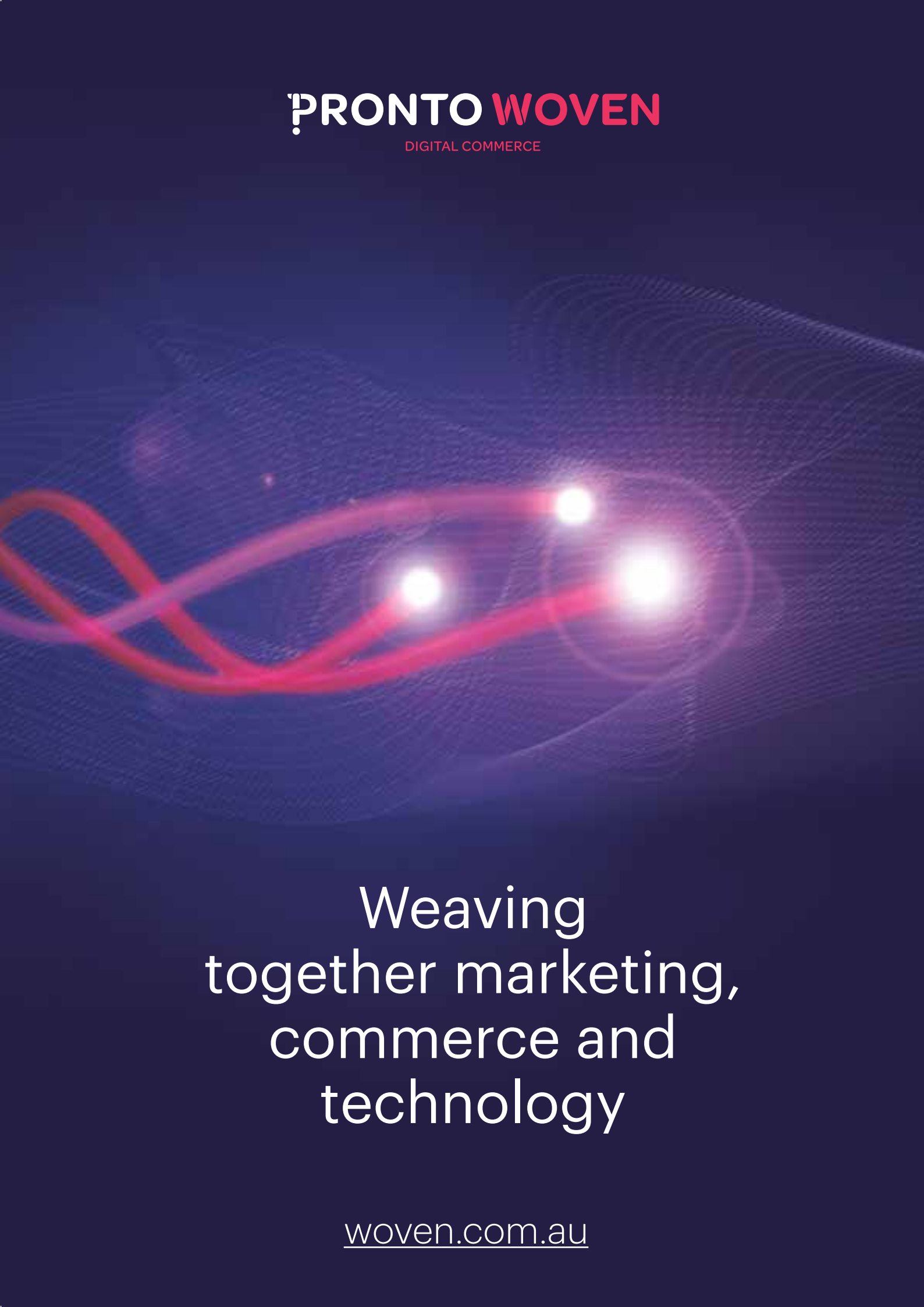
You can monitor the performance of vendors to ensure they are meeting your standards and/or contractual obligations.

Laboratory

Access the Laboratory module from within Quality Management to monitor test results and ensure product consistency.

PRONTO WOVEN

DIGITAL COMMERCE



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PRONTO Xi

Technology

The right tools for the job

Technology
Contents

Deployment
Contents

Technology
Making it work

Continual improvement ensures Pronto Xi has the strength to support the changing demands of modern-day organisations.

Now, more than ever, businesses need a modern Enterprise Resource Planning (ERP) platform that is flexible enough to adapt to a changing world. Users expect a fast and responsive web interface that's accessible no matter where they are.

Mobile and web technologies have become mainstream and continue to rapidly evolve. Demand for cloud-based technology and services is exploding as businesses realise the benefits of their low cost, quick deployment and hassle-free maintenance. In short, connectivity has become a necessity, not a luxury.

With Pronto Xi, you get to stay ahead of the curve. Underpinning our enterprise applications is a flexible and highly robust infrastructure, combined with a user experience that is fast, highly accessible and designed for user delight.

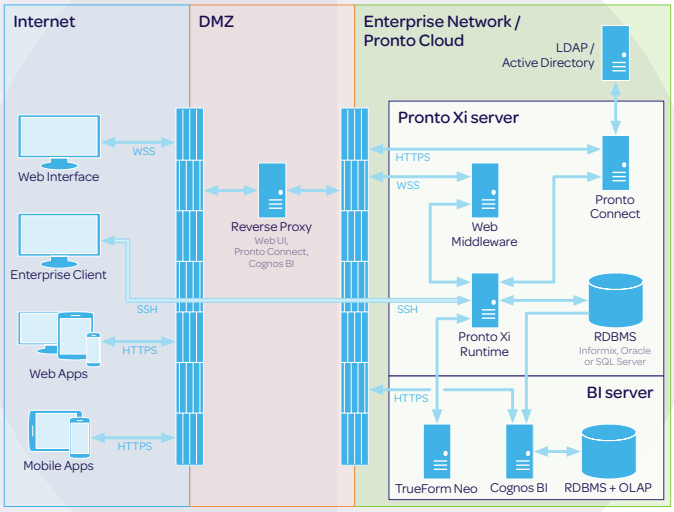
Cloud-based services give you greater flexibility to structure and deploy your package of Pronto Xi modules. Your staff can access most Pronto Xi modules wherever they are, on a variety of devices.

Core platform

A virtually bulletproof core infrastructure underpins the modular Pronto Xi Enterprise applications. It begins with the 'nuts and bolts' that allow the system to operate: the relational database, the operating systems, the Pronto Xi Runtime; and the web or desktop user interface.

Web interface

Built on modern web technologies and combining intensive user research with concepts from Google Material, the web interface frees Pronto Xi from the office. You and your people can transact, report, analyse in every Pronto Xi module, from anywhere, with zero installation. Plus it's the best-looking Pronto Xi ever.



Pronto Connect

Connect your legacy systems and complementary solutions to your Pronto Xi backbone with a comprehensive API framework and development platform. Your systems can exchange data effortlessly, securely and in real time.

Applistructure

Because we understand that no two businesses are the same, we have developed an 'Applistructure' solution that makes it easy to tailor your Pronto Xi modules to exactly fit your needs. So our software adapts to your business needs and processes, not the other way around.

Administration

Administrators have ready access to day-to-day maintenance tasks, such as performing backups, setting up new users, and defining the permissions and security settings for users, as well as a host of other routine functions.

Security

With increased adoption of mobile and Cloud technologies, security has never been more important. We take your security seriously, and Pronto Xi includes a range of security technologies and mechanisms to protect your organisation.

Developer tools

For businesses that want to do their own customisation, development tools can be provided, including the Rapid Application Development (RAD) and a Software Development Kit (SDK). The same tools are used by Pronto Software's own development and professional services teams.

All this, and you can relax knowing we'll continue to update Pronto Xi so it's always compatible with the latest versions of supported operating systems, databases, web browsers and business applications.

Core platform
Where everything clicks

The core platform of Pronto Xi gives you a robust, enterprise grade foundation. It's a powerful launch pad for powerful business performance.

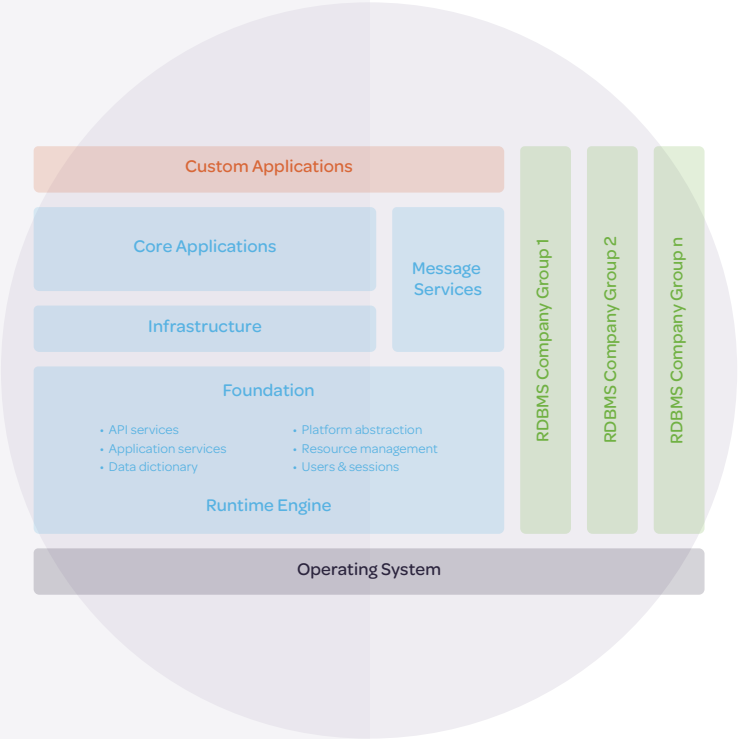
Pronto Xi Runtime

The Pronto Xi Runtime 'brokers' communication between Pronto Xi applications and the underlying IT platform.

With technology-independent architecture, Pronto Xi Runtime supports multiple combinations of hardware, operating systems (OS) and relational database management systems (RDBMS).

Key features include:

- Technology abstraction for porting applications to multiple platforms
- Execution and management of the applications and general system environment
- High availability and high volume transaction processing



Powerful and flexible, relational database support

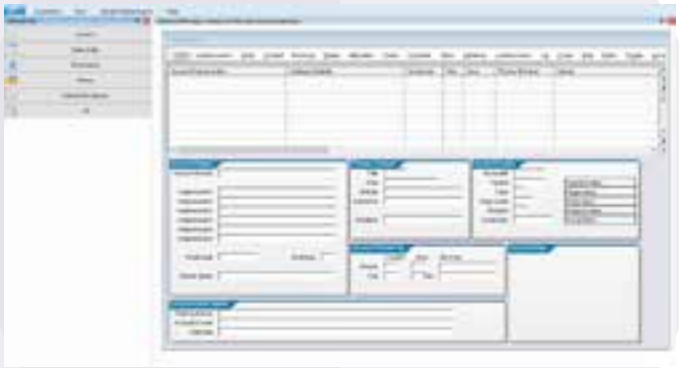
Pronto Xi is optimised to take advantage of the benefits a relational database brings to high performance transactional processing environments, as well as support the reporting and analytical needs of Pronto Xi Business Intelligence.

While the major databases – IBM Informix, Oracle and Microsoft SQL Server – are supported, Pronto Xi is strongly aligned with IBM Informix to ensure your data management is as simple and efficient as possible. IBM Informix provides proven reliability, security and performance, and in combination with Pronto Xi it offers:

- A fully featured RDBMS infrastructure
- Reliable and secure data storage
- Fast and flexible transaction processing
- Virtually zero administration
- Flexible levels of resiliency — for example, High Availability Data Replication (HDR), Remote Secondary Server (RSS) and Continuous Log Restore (CLR)
- Scalable configuration from simple to high level
- Cross-platform support (Redhat Linux, IBM AIX and Microsoft Windows Server)
- Standard Open Database Connectivity (ODBC), supporting a broad range of information management applications

IBM Informix offers some of the best scalable performance metrics for online transaction processing (OLTP) in the market. Some sites run tens of millions of transactions through a single data server every day.

In addition, it's designed for 'hands-free' administration, making it perfect for organisations wanting to get more from their information without needing to invest in additional technical support.



Pronto Xi Screen Customiser

Optimise user efficiency and minimise input errors with Pronto Xi Screen Customiser, an administrator-level customisation tool. You can change Pronto Xi screens, create remove and modify fields, change default values, and even apply rules to data within fields — for any company, group or user.

Change screen prompts and fields

Move screen prompts and fields, edit text, or change font, colour and size.

Change field defaults

Field defaults may be predefined for different operators or different levels of operator. For example, all Sydney-based operators may want the default warehouse to be 'SYD'.

Hide fields, buttons and screen prompts

Where a field is not necessary — because it will always contain the same value, or is not used — it can be suppressed.

Make fields 'read-only'

Change an editable field to a read-only field, so the content cannot be altered.

Change field/button help

While Pronto Xi has built-in context-sensitive help, administrators can include company-specific help information as well.

Add screen, field or button triggers

Launch a process external to the basic logic of the screen based on user activity. For example, calculate the starting value of a field based on previously entered information or notify a manager if a sales order exceeds a specified dollar amount.

Create user-defined buttons

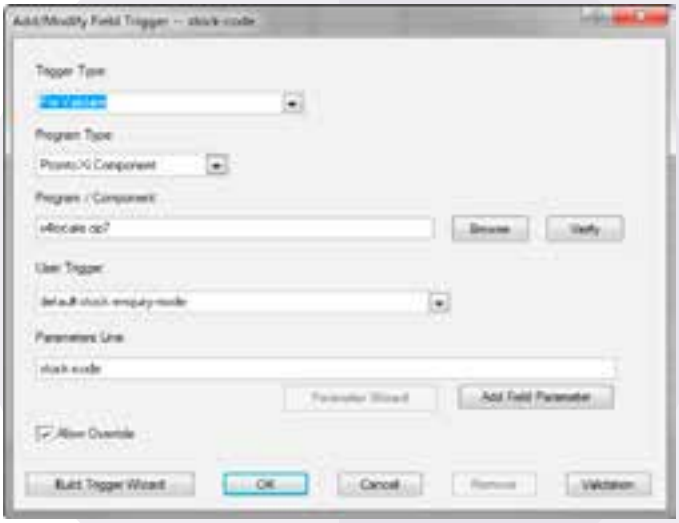
Create additional buttons on a screen to launch processes that you define.

Allow access to user-definable fields

A set of fields is included in many of the master and transaction tables, which companies can use for their own supplementary data storage. Screen Customiser allows these fields to be easily included in regular input screens.

Add calculated or lookup fields to data-grids and forms

Ensure that the screen being used is as information-rich as you like by including data from other tables or information that is calculated on the fly.



Application Services

With a clever Applications Services daemon, Pronto Xi programs can be scheduled without needing to set up scheduled tasks at the operating system level. All running services are checked at one-minute intervals to determine whether any program is due for execution.

You can set up Application Services to perform backups, run reports and update functions according to predefined values. It can even be used to control such vital functions as end-of-period processing, real-time data synchronisation across databases, streaming updates and message-based functions used to communicate between distributed servers, databases and applications.

Processes can be set-up to run multiple times during the day, or at any given time-point. Every time a program is executed it is logged for easy and direct verification.

A single service can be set up to execute a program in multiple companies, either concurrently or consecutively. As all services operate independently, there is no risk of a job not being executed because the execution of a program by another service has failed.

Message Bus and Message Broker

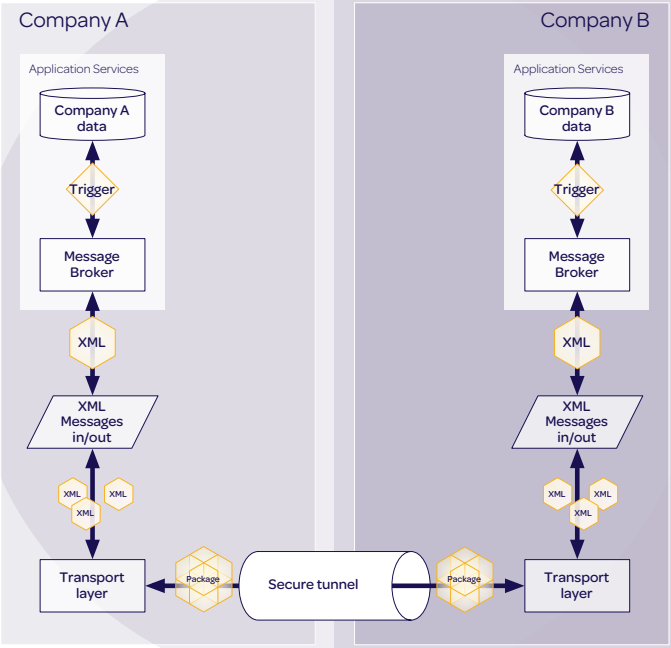
Message Bus allows for the sharing of data between two disconnected Pronto Xi databases or companies. It is ideal where reliable synchronisation between data sets on remote sites is required, such as franchise systems that share a common inventory database or Point of Sale (POS) systems where redundancy is used.

Data can be selectively shared between remote installations, employing a 'publish and subscribe' methodology to ensure efficient message delivery and synchronisation.

At the heart of Message Bus is Message Broker, which manages the message queues and processes the message data. It identifies Pronto Xi datasets both locally and remotely and automatically handles the exchange of data between datasets on the same physical server.

Message Broker is independent of any communication protocols, so it functions consistently and reliably whatever communication medium it is working over. There are also several measures included to enhance security and data quality, including message validation routines to ensure that what is sent is exactly what is received.

Intelligent business tasks can also be performed without user intervention, such as masking data in certain fields depending on the subscriber. Message Broker also contains a 'refresh' function to bring remote datasets into line with a master dataset in case of data corruption or hardware failure.



Extensibility

The Service Oriented Architecture (SOA) of Message Broker allows high levels of customisation without compromising stability. At each stage, standard business rules can be 'replaced' with custom business rules to suit your particular needs.

Franchise inventory

A key requirement for franchise operations is the quality of inventory information. With Message Broker, core inventory data is selectively shared with franchisees. You can set up a 'staging area', allowing master data changes to be held back from broadcast until the desired time. For example, price changes can be sent at a scheduled time ahead of a promotion.

POS redundancy

POS redundancy uses the advanced technology of Message Bus to keep remote servers synchronised with head office. Incremental changes are continually sent to remote servers so that stores can trade with the most up-to-date information.

Administration

Take control of day-to-day administrator tasks, from performing backups and setting network protocols to defining roles and security settings, with complete ease.

Pronto Xi System Administration

Not only can you specify which Pronto Xi modules you want to use, but with System Administration you can also specify how you intend to use them. In other words, the options chosen will, to a large extent, control the way that Pronto Xi works for you.

While many processes only need to be performed once during installation, you'll always have the flexibility to fine-tune your set-up down the track. Additional System Administration functions may be used for ongoing maintenance or 'housekeeping'.

The System Administration utility provides a menu of functions for administering Pronto Xi. Incorporated into this is the ability to maintain certain related parts of the UNIX/Linux system without the need to remember complicated command lines or file formats. For example:

- Backup/Restore Data
- User Control
- Terminal Control
- Printer Control
- Batch Queue Admin
- Database Control

Roles and securities

User level access is controlled by a wide selection of roles and security profiles. Systems Administration level staff can tailor user permissions to restrict user access to individual companies, entire modules or specific functions within screens across Pronto Xi.

When new users are created they are assigned one or multiple roles to define their authorised access to Pronto Xi. A role contains a list of Pronto Xi modules and functions to speed up assignments. Wildcards can be used to indicate all functions.

You can also allow multi-company operation and specify which companies or directories each user may access. Or even define the access each user has in each company.

Develop your own roles to define a job function according to your company's needs, or simply go with Pronto's 'out-of-the-box' roles. User-defined functions can also be created and added to an existing role.

Data Quality Management

Data Quality Management (DQM) increases system availability by reducing the downtime caused by administration processes. DQM has new data checking programs that supersede the integrity routines in prior versions of Pronto Xi.

Faster data check-up

By default, DQM only checks changed data, making the entire procedure more efficient. Users can control the frequency of DQM processes via Application Services and define the type of checks to run.

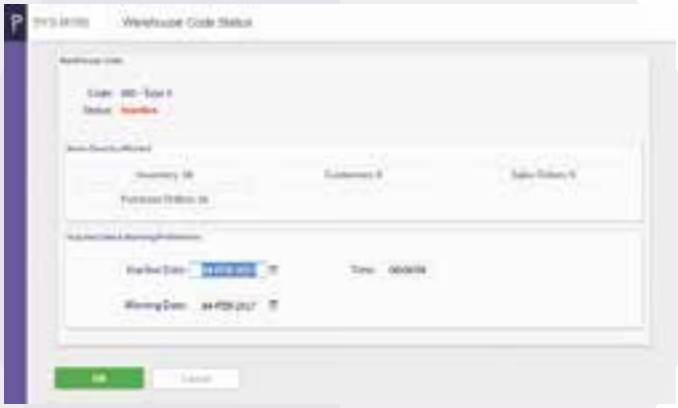
Better visibility

A Data Quality dashboard displays the status of DQM processes as well as all identified issues.

Easy data clean-up

DQM groups issues by module and classifies them as referential, calculated or orphan/other.

Users can manage data issues as they arise by correcting master records or perform bulk replacements. DQM will validate the corrected data, removing the issue from the DQM Dashboard.



Code Table Status Control

With active/inactive status for the warehouse, territory, item group and sales representative code tables, use of a code can be prevented. A suitable date can be selected to warn users of an upcoming change of status.

Data masking

To complement the tight and flexible functional security of Pronto Xi, System Administration provides data masking to restrict access to certain application data. Through the Custom Authentication Protocol (CAP), all data masking is also automatically obeyed in Pronto Xi Business Intelligence reporting.

Auditing

Pronto Xi audits many activities within the system and monitors changes to master records and major function flags. This gives you total control over the changes that are made to your system, and keeps you informed about users making changes.

System Audit can create reports on changes made to system settings, who made them and when. Further audit reports record changes to 'static' master files, as well as transaction processing.

Audit Management provides a strong audit capability by recording data changes (insert, delete and update) to key files. Files defined as requiring audit are flagged at a dictionary or schema level.

The Audit Management menu allows authorised staff to configure the audit environment. Administrators can determine the number of days to include in each log file, and the number of log files to retain. You can also define which users have security access to audit information for specific data tables.

- Pronto Xi Business Intelligence administration

With Pronto Xi, your administrators have complete flexibility to ensure your Business Intelligence suite provides the right information to the right people. They can set access controls and user capabilities as well as other reporting server functions, such as:

- Server setup
- URL path maintenance
- Data source configuration
- Calendar and time dimension settings

Pronto Xi web interface
Fast, faster, pronto

A modern user interface that performs flawlessly on a range of platforms. Now with Workspaces, a drag-and-drop canvas for displaying a range of charts from your KPIs.

Our innovative approach to User Experience (UX) design is all about simplifying processes and making you more productive. Using modern web technologies, the Pronto Xi web interface delivers a fast and responsive work environment that's accessible no matter where you are or what device you're using.

Designed for user delight

Modern and simple, the web interface makes navigating screens and menus, entering and viewing data, running reports, and configuring user preferences and favourites extremely straightforward. A variety of data entry methods are catered for, whether you're using a keyboard and mouse or a touch-screen mobile device.

Whichever Pronto Xi modules you are using, there is a consistency in format and function that makes learning new modules quick and easy.

Highly accessible

Using a web interface means you can do what you need to do, when you need to do it, from a variety of devices and without any software installation. For system administrators, rolling out updates, or adding users is very straightforward.

Integrated back pane

An integrated back pane allows business system information to be delivered to any users within your organisation directly from the Pronto Xi web interface. This is particularly useful for simple access to Pronto Xi Business Intelligence workspace items such as reports and business dashboards.

In addition, corporate intranets, external websites, corporate noticeboards, executive information systems, interactive workflow diagrams or customised web pages can be easily accessed.

Data grids

Data grids allow users to view Pronto Xi data in a tabular format. Data can be filtered, sorted and highlighted according to each user's preferences, and exported to a spreadsheet (such as Microsoft Excel, Office 365 Excel Online or Google Sheets) or an XML report.

Maintain control of data entry by setting personal field defaults. For example, when creating a new customer account a user may always use a specific customer type. The personal field defaults enable screens to suggest field values appropriate for the user's role or department.

Data grids will also auto-scale to maximise the full real-estate of your display, ensuring you have the best view of your information, as you need it.

Quick Links

Quick Links allows you to attach any file, website or network location to anything in the Pronto Xi database. This means you can associate images, documents, spreadsheets, PDF files, movies or web pages with any stock item, customer, supplier, sales order, purchase order line, or any other element within Pronto Xi.

With a button on the toolbar, links can be opened directly from the Pronto Xi screen. This makes performing routine tasks much more efficient.

Powered by the latest web-socket technology to ensure a fast user experience

Fast user performance, and real-time field-level validation is delivered using the latest in web-socket technologies.

This means that data entry validation happens at a field-level in real time, not at the end once the form is submitted. Not only does this avoid user frustration due to lag time and data re-entry common with web applications, it also ensures that business process rules are followed during a transaction. Altogether this makes the user more productive, helping them to complete their tasks as efficiently as possible.

Full Pronto Xi within a web browser

Elegant and intuitive to navigate

Supports personalisation and shortcuts

Increased user productivity

Quick to learn and easy to use

Available on a range of devices

Stateful and secure connection between web interface and server

Web socket technology delivering real-time, field-level validation and entry

HTML5 and CSS3

Latest web UX methodologies

Workspaces

An interactive, drag-and-drop canvas that displays real time and relevant information to each staff member, Workspaces facilitates decision-making and priority setting while enhancing collaboration across your organisation.

Choose from more than 80 KPIs (Key Performance Indicators) and other widgets. In one click, see how you perform against your personal KPIs. Enhance user personalisation with many options to format data, including:

- Selection of chart types
- Trends over a period of time
- Sorting, filtering and more

Workspaces is an optional, alternative view to the right-hand pane that displays web pages, workflows and company information.

Enterprise Search

With Enterprise Search now added to the web interface, finding frequently used data or menu functions is now just a click away.

Search all available modules or select the ones that are most relevant. Each search result presents a range of options – for example, searching for a stock item code gives you the options to:

- Maintain or enquire on the item
- Do a stock adjustment
- Do a QA release

You can also define the default actions for various users.

Enterprise security
Your safety is our priority

Pronto Xi utilises best practices In application security, and offers a range of security settings to keep your organisation safe.

Secure by design

Pronto Xi utilises security standards and industry best practices to maximise the security of your organisation. For example, communications use digital certificates and highly secure protocols such as HTTPS and WSS (WebSockets over SSL/TLS).

Regular security penetration testing also helps to ensure that your organisation remains protected against new and evolving security threats.

Two-factor authentication

A large proportion of modern data breaches involve a weak, lost or stolen password. When two-factor authentication is active, a secondary verification code is required when logging into Pronto Xi, In addition to a password. The code changes every 30 seconds each single code can only be used once, which significantly Improves user login security.

Application security

Administration tools enable user permissions to be scoped to individual companies, modules, screens or functions, through use of roles and security profiles. Through screen customisation, even the Individual fields that a user sees can be controlled.

Additionally, data masking limits which data a user can access. For example, access can be restricted to Individual locations, territories, branches, asset groups and much, much more.

Segregation of duties can be achieved using some or all of these application security capabilities.

Secure infrastructure

Pronto highly recommends the use of digital certificates and reverse proxy servers to maximise the security of surrounding infrastructure. Pronto and its partners have expertise in deploying infrastructure that has your security needs at the forefront.

Forms management
Your documents, personalised

An easy to use solution for creating standard and customised forms in Pronto Xi. Print barcodes and labels, and distribute your documents directly from Pronto Xi via email.

Pronto Xi TrueForm Neo

Pronto Xi TrueForm Neo allows you to format and personalise all customer-facing and business documents, and distribute them from Pronto Xi.

Form designer

With an intuitive design interface, TrueForm Neo makes it easy to create high-quality, professional forms, including invoices, statements, purchase orders, credit notes, pick-slips, payslips and many others.

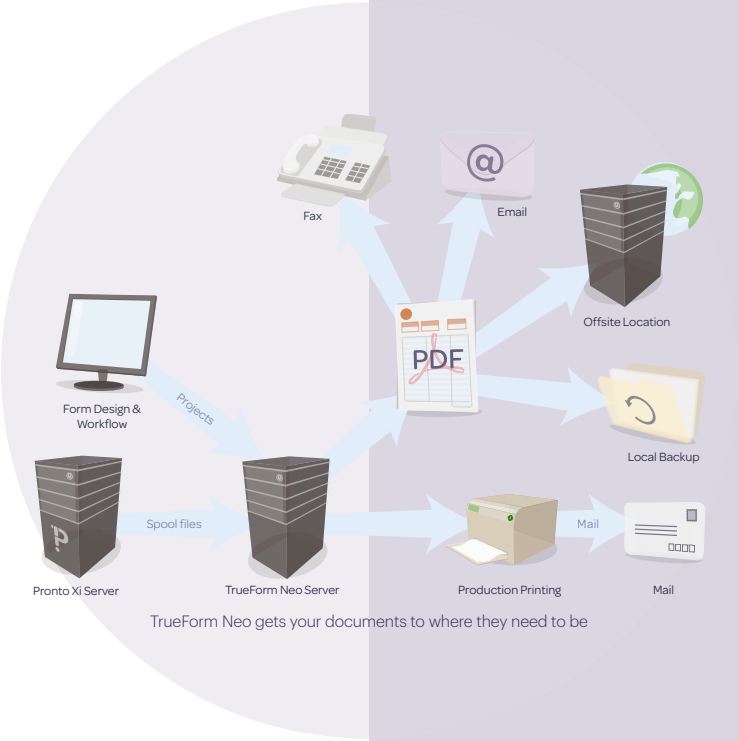
Boxes, lines and other graphic elements, as well as images such as company logos, can be accurately positioned wherever required to ensure professional looking output.

Fonts and barcodes

Barcode and label printing is native to the TrueForm Neo environment so any piece of data (Item Code, Customer Code, Invoice Number etc.) can be automatically converted into a barcode or QR code format at print time.

Pagination control

TrueForm Neo handles all pagination requirements, giving you control over your page design.



TrueForm Neo gets your documents to where they need to be

Templates

With a range of standard templates available in both landscape and portrait formats, TrueForm Neo gets you up and running quicker with key business forms important for your business. These include;

- Sales Order Quotation
- Sales Order Picking Slip
- Sales Order Delivery Docket
- Sales Order Confirmation
- Sales Order Tax Invoice
- Sales Order Credit Note
- Sales Order Transfer
- Payment Summaries
- Overdue Letters
- Purchase Order
- Customer Statement
- EFT Remittance
- Payslip
- Advanced Warehouse Picking Slip

All standard templates contain alternate row shading for the detail area of the forms, placeholders for logos and data mapping from standard Pronto Xi fields.

Conditional display

Data, static text and graphic formatting can be made conditional upon data within the form, allowing businesses to operate in multiple languages, use different logos for different trading names, or suppress certain fields for particular customers.

Printer queue management

Managed as part of a central server component, TrueForm Neo allows management of print queues which allows administrators to control an array of functions, including printer queue configuration and the management of log files.

Form output management

By converting manual procedures into a single, automated electronic process, Pronto Xi TrueForm Neo ensures business documents are distributed efficiently. Its features include:

- An intuitive interface to define document distribution rules and workflow
- Simplified print queues
- Reduced (or eliminated) physical document storage and distribution costs
- Automatic conversion of raw Pronto Xi data into professionally published PDF documents for distribution
- Dynamically defined document names and save locations for simple archiving

You can also email and fax any Pronto Xi document or report directly from Pronto Xi. This reduces postage costs and the labour costs of folding, addressing and posting documents. It also means the time taken to do a monthly statement run can be reduced from days to minutes through full automation of document delivery.

Tasks and Alerts
Intelligent, informative, efficient

Automation and efficiency tools to keep your operations running like clockwork.

Pronto Xi Alert Intelligence

Alert Intelligence provides automated alerts to facilitate exception management. It's easy to define what events will trigger a notification, who will be notified, and what action should be taken.

Typical events include when an unusually high transaction is processed through Pronto Xi Accounts Payable, when inventory levels have dropped below minimum, or when a service call has been allocated to a technician.

Alert Intelligence is not just limited to monitoring events. It can also periodically check the status of any record, or set of records, at scheduled times. For example, a manager could establish a monthly Alert Intelligence task that raises an alert when expenses exceed budget by more than 10%.

Pronto Xi Task Intelligence

Pronto Xi Task Intelligence extends the functionality of Alert Intelligence to ensure tasks are carried out quickly and efficiently. You can assign staff to carry out particular tasks and automatically synchronise these tasks with each person's Microsoft Outlook or Office 365 task list.

A range of criteria can be applied, including how the staff member should be notified, how much time has been allocated and the priority of the task. You can also specify a time for a reminder notice to be sent and provide feedback about the status of the task.

Pronto Xi Data Intelligence

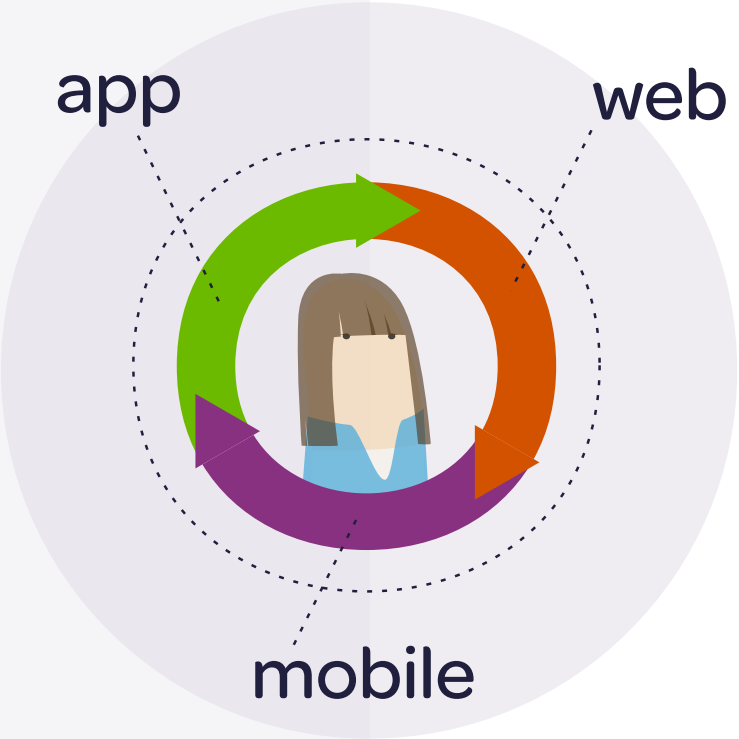
Data Intelligence makes it easy for your staff to extract and present data. Data tables can be filtered, sorted and highlighted to suit individual needs, and exported to non-Pronto formats such as XML, OpenDocument Spreadsheet (ODS), Comma Separated Value (CSV), and Microsoft Office Excel if desired.

Data Intelligence also includes a range of tools to help you find and secure information within your data tables. A Data Finder will allow you to search for a particular value across multiple tables, while a Table Security tool offers protection for valuable data by specifying who can access which tables.

Pronto Connect API platform
Global in, global out

Using industry-standard web services architecture, Pronto Connect enables application mobility or integrates your external applications and platforms with Pronto Xi.

Advances in mobile communications have made data transfer, smart phones and tablet computers inexpensive and widely available. The technologies that enable real-time data transfer to and from platforms are now faster, more reliable and more secure. HTML5 and JavaScript make it possible to create adaptive user interfaces that work on many devices.



Making information flow work

The introduction of Application Programming Interfaces (APIs) has simplified the exchange of data between unconnected applications or processes.

APIs help developers create ways for applications to exchange data freely and efficiently, without human intervention. This reduces data double-handling and human error, allowing for substantial increases in productivity and cost-efficiency.

The most popular kind of API is REpresentational State Transfer (REST). Pronto Connect offers standard, out-of-the-box RESTful APIs as well as a development environment that lets you create custom APIs to improve your information flow.

Technical capabilities at a glance

- Dynamic data transfer using web-services
- Document-based APIs (XML, JSON)
- Incoming web-services API calls
- Outbound HTTP calls via the Pronto Xi Runtime
- Secure certificate and LDAP (Active Directory) based user authentication
- Secure data transfer using Secure Socket Layer (SSL)

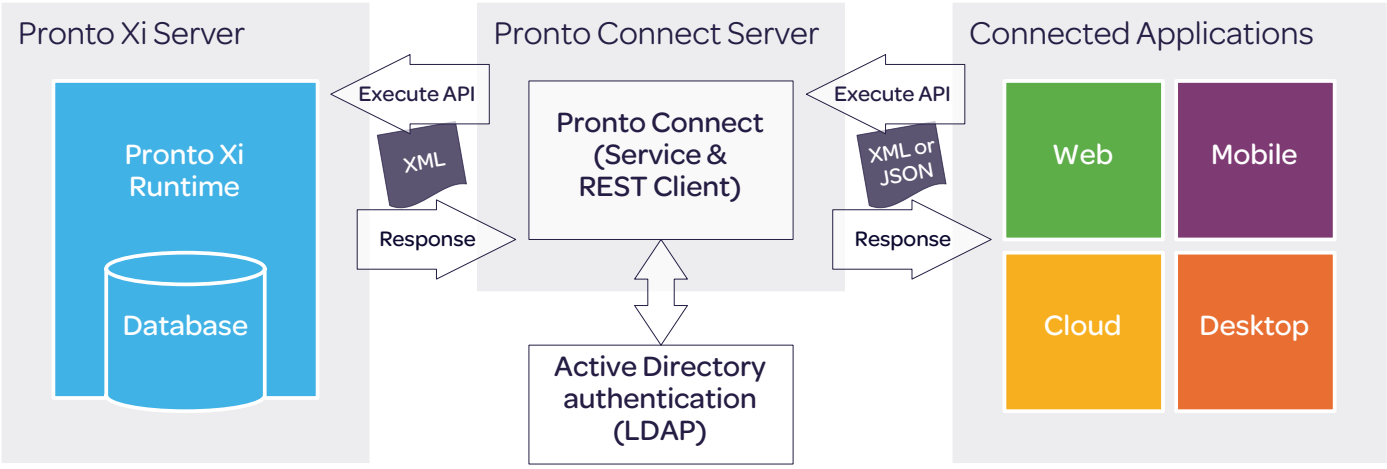
Benefits of web-services

There are several benefits of using web services architecture instead of traditional 'flat file' or field-based API connectivity approaches:

- Real-time information exchange, meaning processes can be completed using up-to-date information, not yesterday's data
- User authentication, so only those who are entitled to access and view data can do so
- No need to maintain a flat file transfer mechanism, which saves time and money
- Fewer upload or synchronisation errors thanks to a reliable messaging system that ensures requested data is delivered as expected

Platform compatibility and support

An ongoing commitment is provided to ensure Pronto Xi remains compatible with the latest versions of operating systems, databases, business applications such as Microsoft Office, and popular web browsers such as Internet Explorer, Firefox, Chrome and Safari. This protects your investment in existing cloud-based or on-premises software tools by linking them to your back-office Pronto Xi platform.



Pronto Connect interacts with Pronto Xi and connected applications

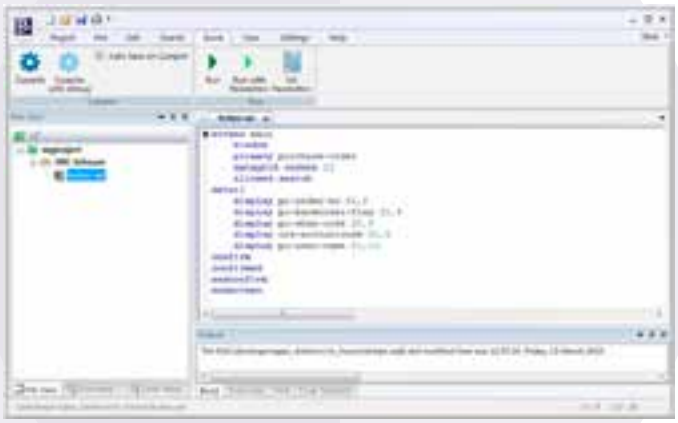
Developer tools
The right tools for the job

If you're looking to make deeper levels of codebase customisation, your development team can use exactly the same tools as ours.

Rapid Application Development (RAD)

Pronto RAD (Rapid Application Development) is a fully integrated, fourth-generation language facility that enables developers to extend or generate applications within Pronto Xi, ranging from the simplest to the most complex, with a minimum of time and effort. Pronto RAD incorporates the following features:

- Data dictionary (database) generation and maintenance
- 4GL – The fourth generation language that most Pronto Xi applications are written in
- SQL – A query language facility for general reports and ad hoc user queries
- LST – The default report generator used with SQL
- RPT – An alternative to LST for more complex reports
- Screen-based application generation and maintenance routines
- Interactive program debugging facilities



Software Development Kit (SDK)

The Pronto Xi SDK is a resource centre for Pronto Xi developers. The SDK can be used in combination with the RAD. It includes documentation, code samples, tips, tools and utilities – all collected into a central repository that continually evolves and grows over time as our community requires new programmatic functionality.

The SDK contains detailed technical information, covering:

- Pronto Xi Object ActiveX control
- Component libraries, comprising both core and publicly exportable procedures
- API calls
- Program calling methods
- Suppressed data entry fields
- Dictionary objects and fields
- Code samples

Real-time trace control

Real-time trace control is a diagnostics utility that allows the activity of Pronto Xi functions to be tracked, stored and reported. Used by both developers and support teams, this function traces input/output (disk reads/writes), procedures and the environment under which a program has been executed. It is helpful when testing or troubleshooting custom code changes using the RAD.

Deployment
Secure, scalable infrastructure that's always on

Pronto Software has a range of flexible deployment options to suit your implementation needs. While on-premises installation is still a smart option for some businesses, technology advancements have many customers realising the benefits of Pronto Cloud.

Cloud implementation offers a range of benefits for business, from lower up-front licence costs to a reduced need for in-house IT resources. It also enables users to access their critical business data from anywhere in the world.

Traditional on-premises deployment suits businesses which need a customised solution, or where there is a business requirement to have IT systems housed on company property.

Cloud ERP

Pronto Cloud provides a new implementation option for businesses looking to lower their costs and remove the complexity of managing their own hardware requirements.

Because Pronto handles the infrastructure, businesses choosing cloud ERP have significantly lower up-front costs than an on-premises implementation. In addition to removing the need for capex, cloud ERP implementation means no need for spending on things like ongoing hardware support.

Pronto Cloud can even host non-Pronto Xi data in our data centres for you, enabling you to remove your server room completely.

A key strength of Pronto Cloud is in our secure and purpose built data centres located across Australia. Pronto offers guaranteed uptime rates of up to 99.99%, and multiple backups of your data stored across data centres.

Data security is an important element for any business. All of our systems receive nightly backups, which are then replicated automatically across multiple data centres. Data recovery can be performed in a matter of minutes.

Cloud implementation offers some advantages for small and medium businesses. It's a scalable solution, meaning you can choose the applications you need, without paying for things you won't use.

In an increasingly mobile business environment, it's important that users have access to critical business data whenever and wherever they are. With Pronto Cloud, you can access your data remotely from anywhere in the world with an internet connection.

On premises

Businesses in some industries, such as financial institutions and government contractors, face strict regulatory requirements on how their data is handled and stored. These companies will typically need to select an on premises implementation and handle their ongoing systems management internally.

Pronto can still help businesses opting for an on premises implementation. Our technical consultants can advise on infrastructure design and modelling, as well as broader IT strategy and future proofing of your IT environment.

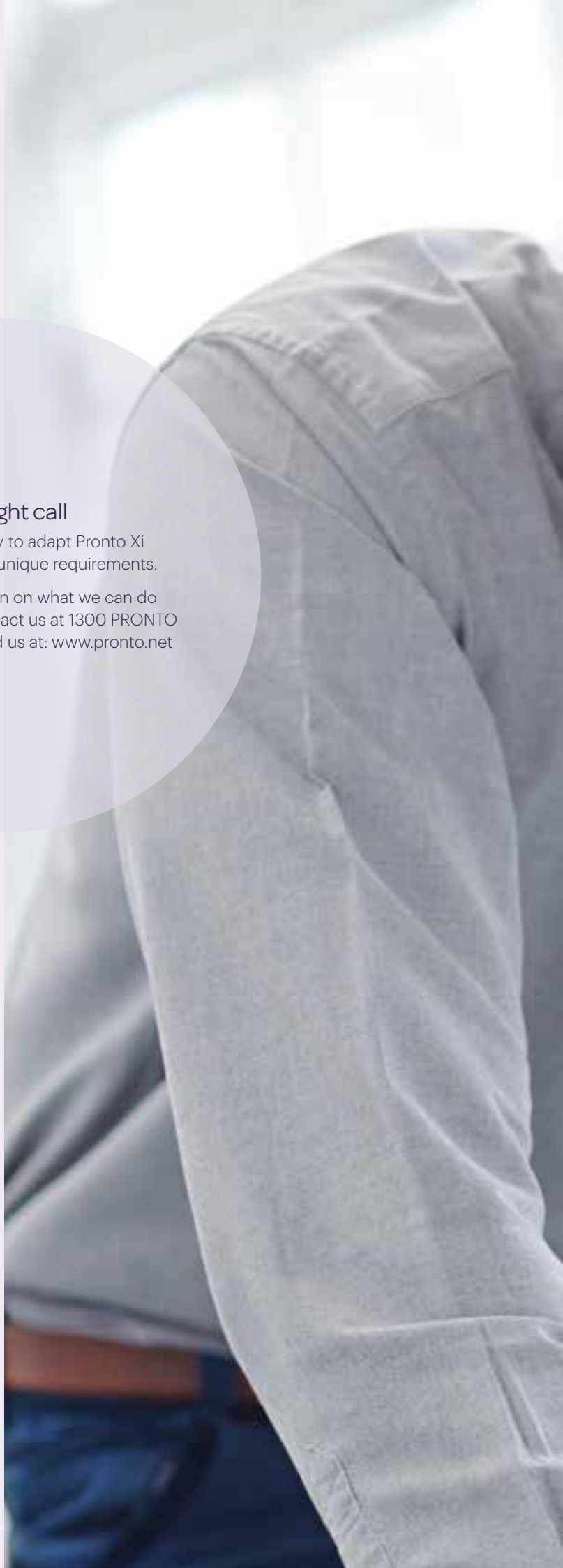
In addition we can offer remote monitoring of your systems and provide strategies for data backup and disaster recovery. Backup and recovery are two critical areas for any business, but especially important for those managing their own system implementation. With assistance from the team at Pronto, you can ensure your business is protected.

24/7 phone support and help desk facilities are also available.

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



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740 Solutions Overview

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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.