PRONTO Xi

750

Marketing Advisory

Trademarks

Disclaimer

This document contains statements related to
our current and future developments that may
constitute forward-looking statements. They are
subject to change and may be available in a 750
service pack or future release of Pronto Xi.

Fast track your business. Deeper insights, greater efficiency.

With Pronto Xi 750 we have built solutions that help answer your hardest questions.

A result of more than 120,000 hours of development, new capabilities and enhancements provide improved business insights and operational efficiency – through process automation and inbuilt intelligence.

With the seamless integration of functionality and services provided by Pronto Cloud, Pronto Woven and Pronto iQ, Pronto Xi 750 is built to assist businesses accelerate growth and boost revenue.

In all, hundreds of improvements and additions have been made to take advantage of changing technology and meet the evolving needs of our customers.

Below are a few of the highlights available in Pronto Xi 750:

- Financial transaction tagging that makes it easier to track expenses
- Integration of the new IBM Cognos Analytics with a more intuitive interface to harness business insights
- Creation of more powerful Distribution Requirements Planning (DRP) and Manufacturing Requirements Planning (MRP) engines that comes into their own with multi-site networks
- Improved Sales and CRM functionality to help sales teams engage customers with the right information at the right time
- Expanded features in Avenue to enhance ecommerce opportunities and simplify payments
- Increased flexibility and support for Service teams in the field
- Technological improvements geared towards increased security and user-friendliness for mobile device users

Ultimately, our measure of success isn't what these changes mean to our business, it's what they mean to yours.

Financials

GL transaction tagging

Tags provide a new way to capture and categorise transactions, making it easier to track expenses at a more granular level without the need to create new GL accounts.

For example, all motor vehicle expenses can be posted in a single account with transaction tags to identify the types of expenses.

Tags are highly customisable with support for hierarchy, budgeting and the ability to capture quantities like litres of petrol or tonnes of extracted ore. They are a powerful way for organisations to track expenses and make more informed budgetary decisions.

Easier General Ledger budgeting

Profit and Loss (P&L) and Balance Sheet budgeting can now be done at any level directly in Pronto Xi.

Budgets for the P&L and Balance Sheet can be changed directly in the hierarchy view, removing the need to export and import data in spreadsheets.

GL executive analysis summary

You can now define GL summary views based on a combination of GL dimensions, such as Natural Account or Department. Highly customisable, this feature provides instant insights with drill-downs to the source data without having to create reports.

▲ Territory	Description	Current Period	Budget	Variance
01	Retail - Frankston	-155,660.18	-153,977.87	1,682.31
02	Retail - Dandenong	-42,297.29	-48,761.71	-6,464.42
03	Retail - Blackburn	-14,040.39	-23,162.84	-9,122.45
04	Retail - Bendigo	-166,328.55	-144,119.17	22,209.38
05	Retail - Croydon	-46,733.71	-45,348.36	1,385.35
06	Retail - Sale	-32,189.30	-21,541.48	10,647.82
07	Retail - Nunawading	-101,502.00	-105,189.88	-3,687.88
08	Retail - Chadstone	-20,074.00	-22,839.15	-2,765.15
09	Retail - Chatswood	-48,351.00	-42,846.97	5,504.03
10	Warehouse	152,412.00	152,233.91	-178.09
11	Marketing	79,396.47	65,400.00	-13,996.47
12	Human Resources	68,063.20	69,500.00	1,436.80
13	Finance	85,411.00	91,500.00	6,089.00
99	Head Office	0.00	0.00	0.00
	Grand Total	-241,893.75	-229,153.52	12,740.23

SecurePay for debtors

To comply with data security standards and reduce business risks, credit card details are no longer stored in Pronto Xi. As a result, integration with SecurePay (Australia Post) has been added to facilitate fast, secure payments via credit card or bank accounts.

Linking Payroll to Resource Management

The availability, rosters, bookings and timesheets of all of your organisation's human resources can be managed with Resource Management. To further streamline employee management, Payroll has been linked to this function.

Employee Portal

Employees can now accept or decline rosters directly from an email or from within the portal. Resource Management data is updated accordingly in real time.

Staff can also complete weekly timesheets by cloning previous ones.

IBM Cognos Analytics

Pronto Xi Business Intelligence gets a major upgrade with the integration of IBM Cognos Analytics. With a completely new, more intuitive user interface and powerful functionality, it really does make it easier to gain insights that drive business improvements.

New user interface

All of the key Cognos Analytics features can be accessed from the welcome screen. A side navigation bar gives easy and convenient access to a refined and fast search-as-you-type functionality, in addition to My Folder and Public Folder.

New sliding panels make navigation very comfortable when managing the content and properties.

Powerful dashboards

Dashboards allow you to access and interact with high-level data in the form of visualisations. When needed, it's easy to drill down to the reports that the visualisations were based on and, in turn, drill down further to the underlying data. This can enhance the understanding of the visualisation and allow users to consider the impact of a number of variables.
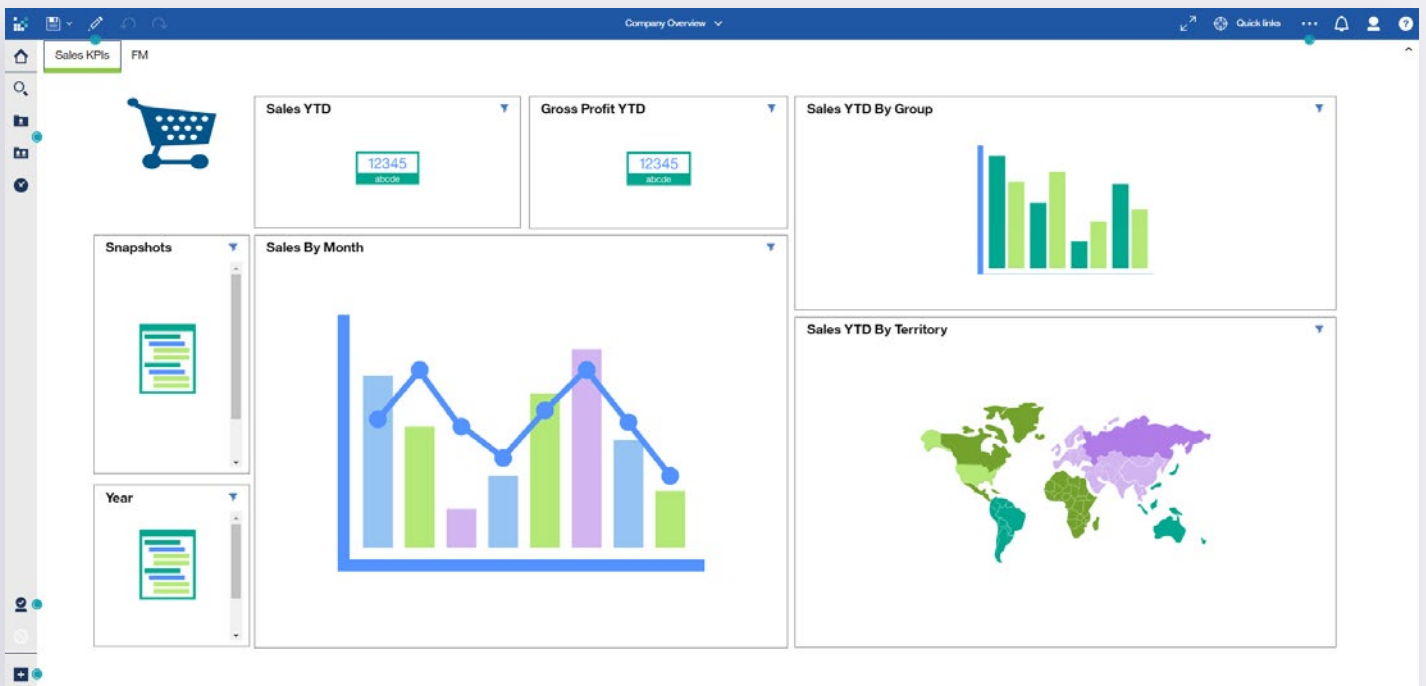
Manufacturing

Multi-factory planning

A highly enhanced planning engine enables multi-factory sourcing and production visibility across a network of factories. It facilitates alternate factory planning and results in more efficient, resource-saving manufacturing operations. Further, production planning outcomes are significantly enhanced with up-to-date demand quantities as Materials Requirements Planning, Distribution Requirements Planning and Master Production Schedule run sequentially in a single routine.

Further enhancements to the Materials Requirements Planning (MRP) engine have enabled faster planning turnarounds, with a 40% boost to the process speed.

A new vertical MRP view, in addition to the horizontal view, helps visualise the results in an easy-to-read manner.

Current View: Standard ▼

▲ Snapshot	Demand	Receipt	Parent/Item/Cust	Type	Order	Balance
		3	On Hand			3
19-DEC-2016	1		MN-TT	SO	1200020	2
19-DEC-2016	1		MN-TT	SO	1200031	1
12-JUL-2018	1		ABC	SO	1206186	0
31-AUG-2018		630	Receipt		Planned	630
31-AUG-2018		630	Receipt		Planned	1260
31-AUG-2018	630		Sales Forecast	SF		630
01-SEP-2018	630		Sales Forecast	SF		0
01-OCT-2018		735	Receipt		Planned	735
01-OCT-2018	735		Sales Forecast	SF		0
01-NOV-2018		735	Receipt		Planned	735
01-NOV-2018	735		Sales Forecast	SF		0
30-NOV-2018		840	Receipt		Planned	840
01-DEC-2018	840		Sales Forecast	SF		0
01-JAN-2019		840	Receipt		Planned	840
01-JAN-2019	840		Sales Forecast	SF		0
01-FEB-2019		800	Receipt		Planned	800
01-FEB-2019	800		Sales Forecast	SF		0
01-MAR-2019		900	Receipt		Planned	900
01-MAR-2019	900		Sales Forecast	SF		0
01-APR-2019		900	Receipt		Planned	900

Supply Chain

Distribution Requirements Planning for complex networks

Sourcing abilities have been expanded with the flexibility to acquire any item from any source, such as a Supplier, Factory, Branch or a Central Warehouse within the network. Large and complex networks will gain efficiencies from a 20% improvement in DRP processing times and the improved ability to manage exceptions when defining centralised and local purchasing rules.

An enhanced visualisation map of the network helps users better identify and navigate source rules across the network in one single view.

Retain cancelled Sales Order lines

By allowing cancelled sales order lines to be retained, along with any notes at the item level, managers can form a better understanding of why sales have been lost. When appropriate, orders can be re-instated at a later date with updated pricing or discounts.

EDI incoming invoice handling

In the EDI environment, supplier invoices received prior to the physical receipt of goods can now be stored in the parked invoices table from AP Automation. This table will match the purchase order against the supplier invoice, manage in-transit control and shipping, as well as split orders on any part receipts.

Pronto Xi CRM

Attributes

CRM Attributes can now store more than one value under a single attribute. This means that information like user preferences, which often have more than one value, is easier to retrieve.

The field length of attributes has also been increased so that larger strings such as URLs can be entered.

Contacts

Contacts can be added into transactions, making it easy to interlink other contacts of an account to transactions or conversations.

Sales orders can be conveniently created directly from the contacts or linked to CRM accounts and contacts, enabling drill-downs to get better insights.
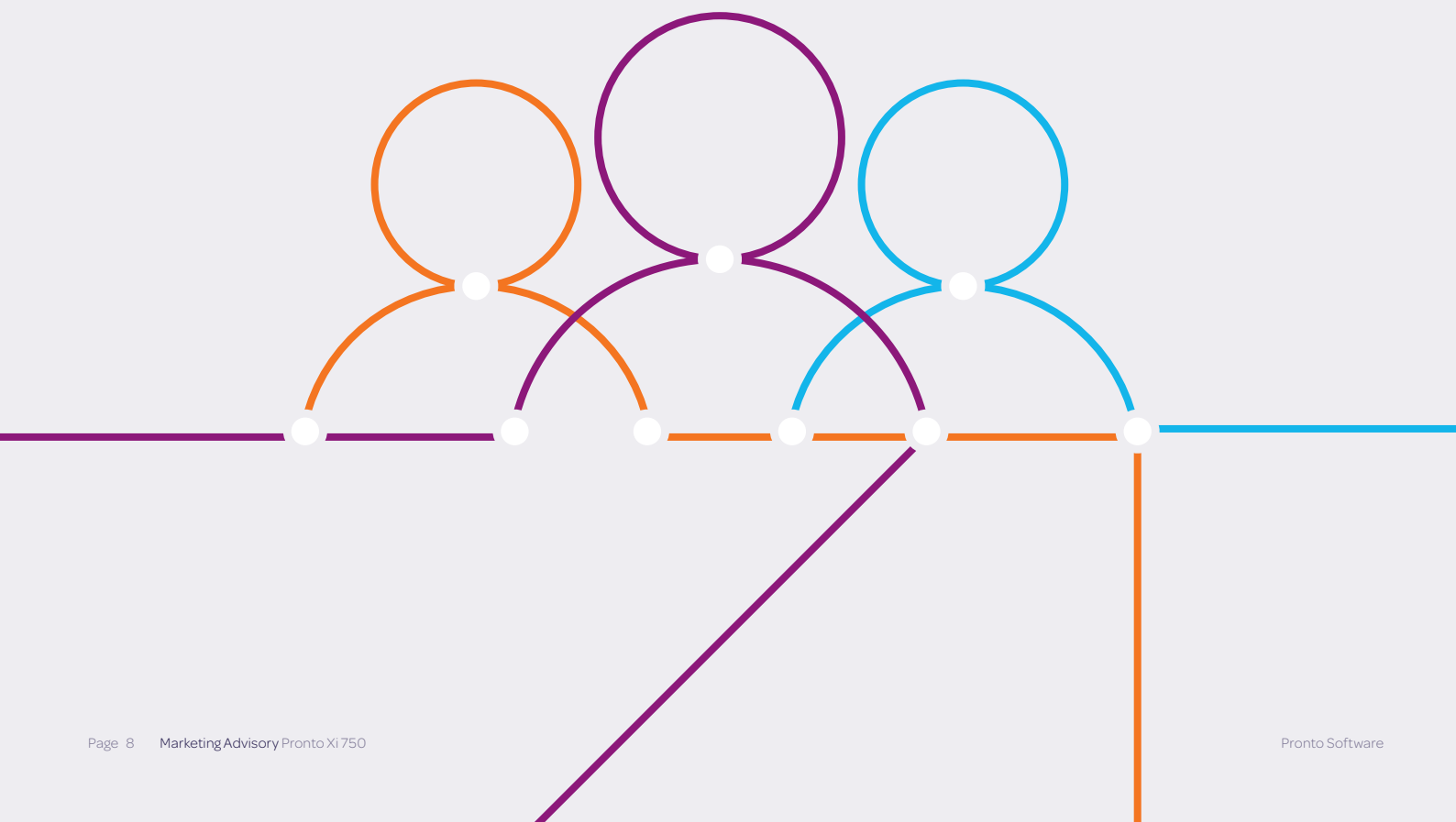
Mobile Sales & CRM

Enhanced sales visibility

A visual sales pipeline encourages sales teams to take prompt actions, remain organised and stay in control of the sales process.

Deal management
All deal data can be managed in one view, with the ability to drag-and-drop deals between pipeline stages. Having a clear overview of all deals can improve strategic decision-making.
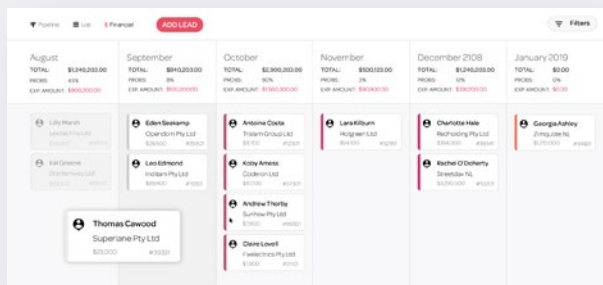

Enrich opportunities with data
Contacts and product information can be added directly to opportunities to create one informative view of a deal. Sales team members can also quickly assess the health of a pipeline and apply filters to access in-depth pipeline analysis, helping them stay on top of sales performance.

Track sales engagement
The new timeline view of a contact, deal or opportunity displays sales activity chronologically. This detailed activity view shows how engaged prospects and customers are during a sales process.
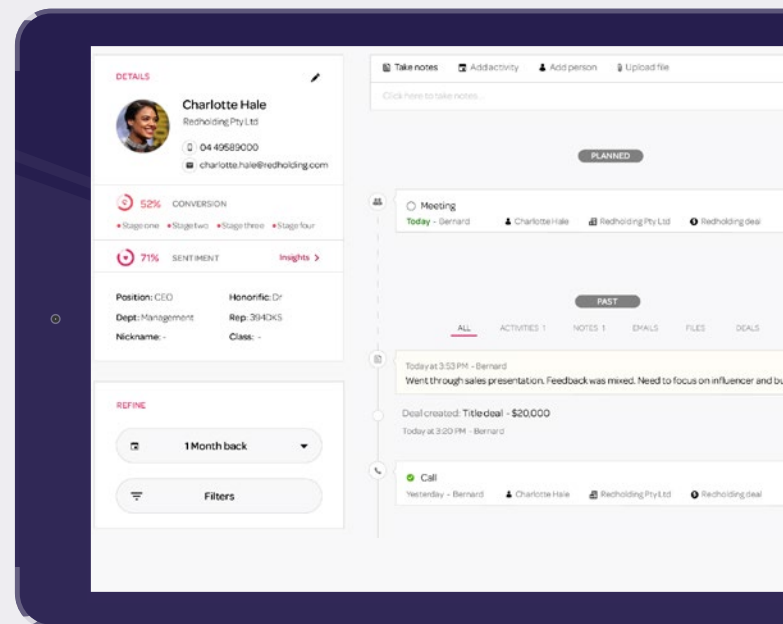
Retail

Store allocations

Allocation of merchandise to stores has now been made quick and easy. It can be done based on historic performance of like items without the need to extract data and feed it back into Pronto Xi.

Repairs

A new console and improved entry and maintenance screens have been added to Pronto Xi Repair. Along with the introduction of intelligent workflows that better suit business requirements, these enhancements provide a more intuitive user experience.

It is now easy to:

- Distinguish between customer and warranty repairs easily
- Separate parts and labour components for better visibility and planning
- Add multiple faults on a repair order, keeping it all in one place
- Use simplified workflows and repair entry processes to get more work done in less time.

Item attributes

Item attributes help extend the description of a product through a structured and ordered categorisation. More importantly, they can be used as data points to 'slice and dice' sales data to uncover customers' buying habits and preferences. These insights can then be put to use in creating sales promotions, forecasting purchases and exchanging data with Avenue and ecommerce platforms.

Promotions

Trigger promotions when they matter
By customising promotion triggers at Point of Sale (POS) or via Avenue, customers can learn of promotions that they are eligible for while they are shopping. This can close sales, and create customer loyalty and repeat purchases.

Print labels
The POS or the back office can easily print shelf labels, with or without promotional pricing, based on active promotions. This makes it easier to run and align promotions across offline, online and POS platforms.
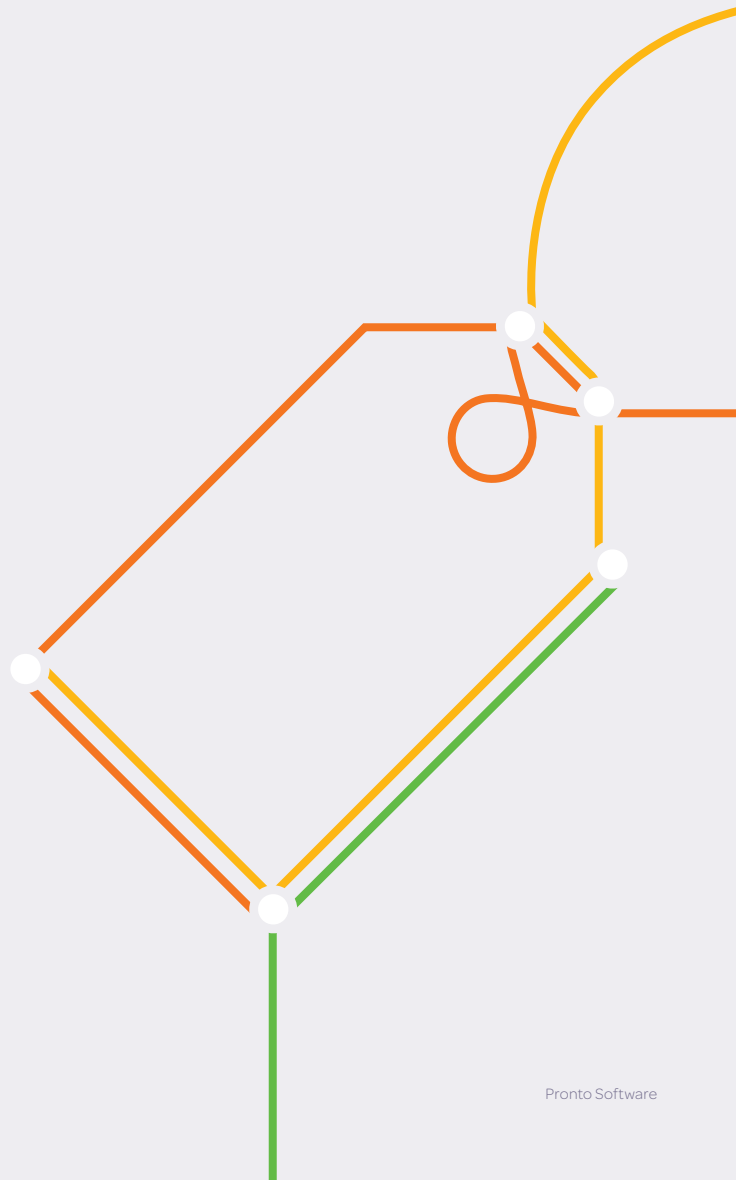
Pronto POS App

An iOS point-of-sale app that integrates seamlessly with Pronto Xi is now available. Intuitive, fast and efficient, it brings user-friendly functionality to the point of sale.
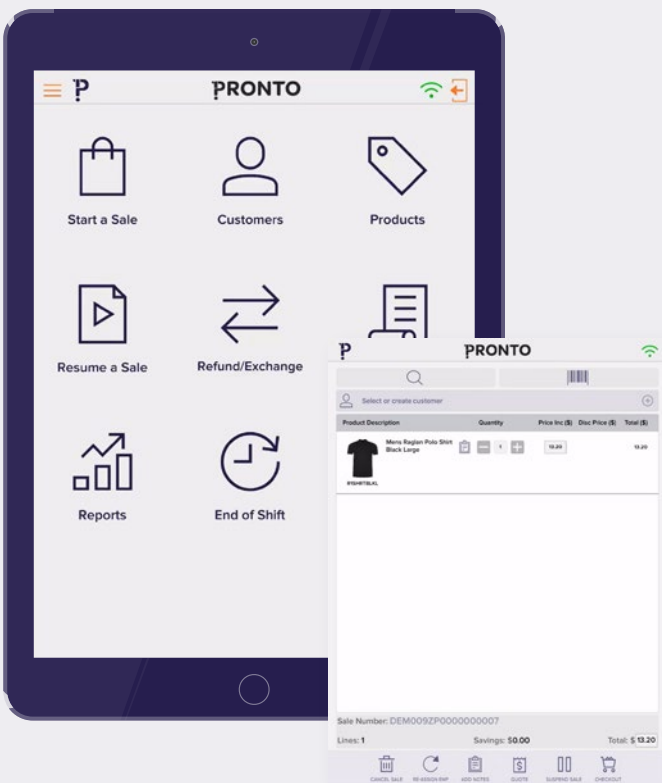
Sell anywhere, even when offline
The POS app works equally well in-store or on the move. It even works in the absence of internet connectivity or power, with access to all promotions on the device.

Payment gateways
With integrated payments, the POS app can flexibly accept cash, card or both using multiple payment partners.

Integrates with external devices
No special hardware is required to run your daily POS operations – it works with Bluetooth printers, payment devices and barcode scanners.

Fully functional
Manage sales, search products, create customers, email or print receipts and initiate returns or exchanges from the POS app.

Avenue

Coupon automation

Encourage customer loyalty by automating coupon creation and distribution based on user-defined rules.

Personalise offers and discounts
Entice new and repeat purchases by offering coupons based on flexible and custom rules such as past purchase history, search behaviour, device, market basket and more.

Distribute coupons automatically
Based on defined rules, your emails are auto-generated and sent with the eligible coupon to the customer. By automating this process, time consuming processes of email creation, list generation and modification are all avoided in favour of selling more.

Sync data automatically
Coupons can be created and maintained in the Pronto Xi promotions engine or POS. Avenue will automatically import those coupons based on the user behaviour triggers set-up, eliminating the manual work of keeping coupons synced across systems.

Flexible payments

Avenue offers a flexible range of payment options to help organisations transact globally, increase mobile conversion, integrate easily and grow average order value – all at the industry's best rates.

Shop Now, Pay Later
Built-in integration with AfterPay and OpenPay increases the purchasing power of customers through ready-to-go consumer financing options.

Multiple payment gateways
Avenue makes it easy to set up and accept transactional or recurring payments with a highly reliable, secure and fraud detecting infrastructure. Leading platforms like eWay, SecureWay and PayPal (Braintree) are fully integrated, allowing you and your customers to choose the most convenient option.

Digital catalogues

It's now easy to create your own digital product catalogues. Flexible and device agnostic, digital catalogues allow customers to browse products and make purchases by clicking through to Avenue's ecommerce solution.

Build your own
Avenue's easy-to-use builder can be used to create a digital catalogue from ready templates, customised for your brand. All data comes from Avenue and Pronto Xi, ensuring consistency across platforms.

Personalise
Teams can use customer data from Pronto Xi to personalise the catalogue for each customer and distribute it via PDF or browser (online). This can dramatically improve customer engagement.

Save costs
Moving catalogues onto a digital format not only enhances the customer experience, it eliminates print and other production costs.
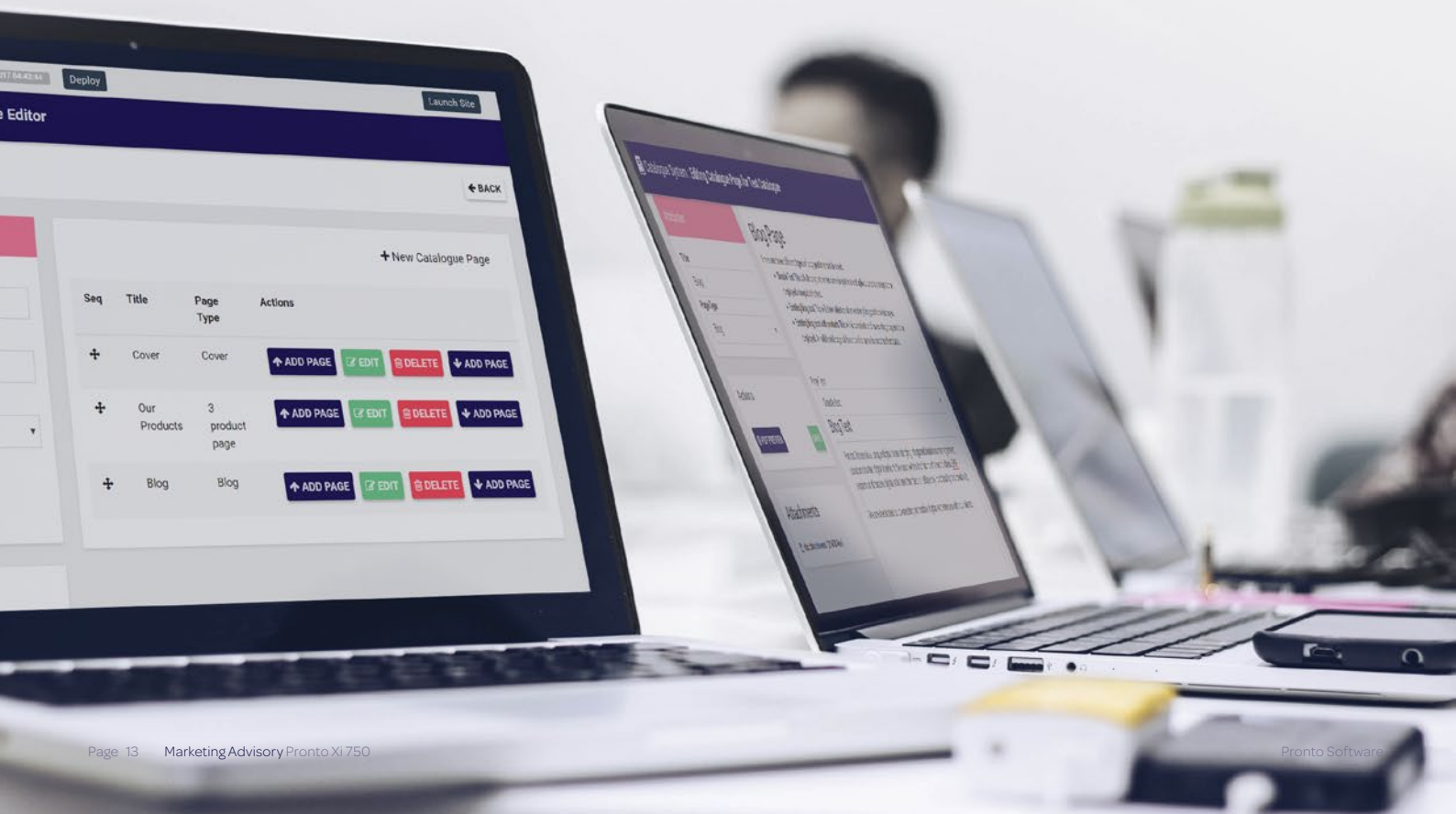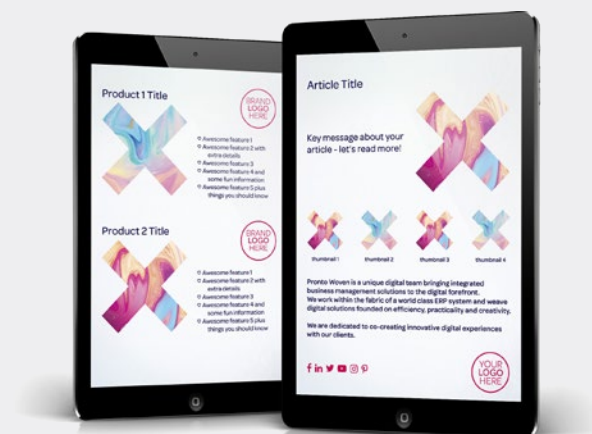
Shopify connector

Data is auto-synchronised between Pronto Xi and Shopify systems via the Shopify Connector. Pronto Xi remains the single source of business management information while the connectors help expand the business reach without the accompanying growing pains and headaches.

All product details, pricing, inventory, order and shipping information synchs seamlessly every minute, ensuring that customers always see the most updated information on the online store.

Pre-built field mappings quickly create the store and upload product information from Avenue. This means orders can be accepted soon after going live, and less time is spent matching product fields between Pronto Xi and Shopify.
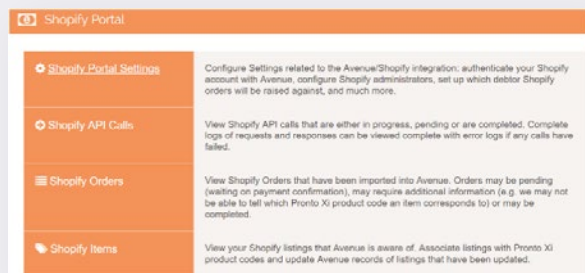
Facebook ads - Add-on

Personalised Facebook ads allow you to retarget customers or online store visitors, keeping your business top-of-mind even when they are not on your website.

The Facebook add-on sends ecommerce data to Facebook Pixel so that dynamic ads can be created based on criteria such as demographic user data, product groups viewed, product pages visited and past purchase information.

Amazon connector

Amazon Connector creates a high-performance bridge between Pronto Xi, Avenue and the Amazon marketplace.

It is a full-loop solution to manage product and order fulfilment through a single platform. By eliminating manual maintenance of data across systems, it frees time and resources to focus on growing sales.

An easy-to-use interface simplifies the product listing process and its mapping to the right categories. This keeps products easily discoverable on the marketplace.

All orders and their statuses generated from the marketplace are automatically synced to your ERP, eliminating the time consuming and error prone manual order entry and update process.

Service Management

Google Maps integration

The introduction of Google Maps integration will enhance service delivery. Service Managers can stay up-to-date on the location of each member of the service team and allocate calls based on real-time information like traffic, route directions and location.

Service call map view

Locate the nearest available team members to service a call based on the service call address. With all resource information (including workload) readily available, any service team member can be chosen and immediately allocated to a call.

Best routes and location history

Service team members in the field can access the same information as the Managers via Pronto Xi Mobile Service.

Additionally, Service Managers can review location history to further optimise resource allocation strategies and improve customer service response times.

By understanding the whereabouts of field resources, service organisations can build cost-saving efficiencies into their processes without compromising customer satisfaction or OH&S obligations.
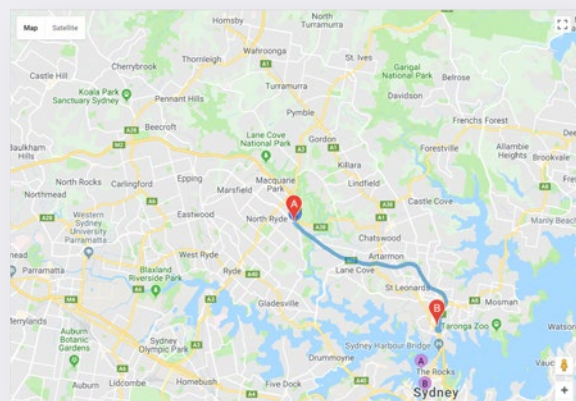
Service call allocation

Service operators can allocate multiple resources like personnel, subcontractors, teams and or equipment from one centralised screen. At the same time, further details about the resource can be obtained to facilitate the allocation process.
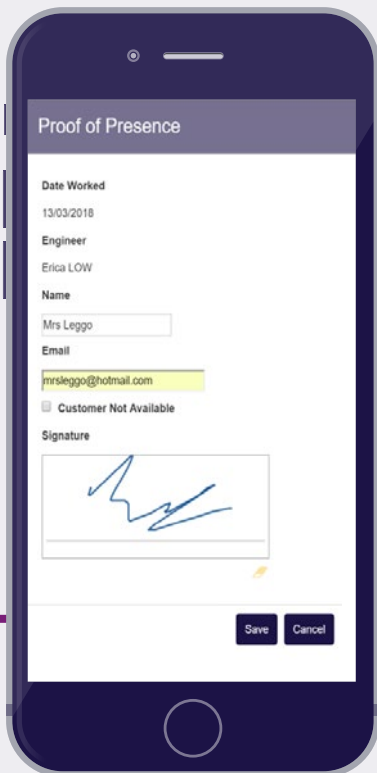
Preventive Maintenance

It is now easier to allocate resources to Preventive Maintenance routines. Resources can be either a single engineer, a team of engineers or Resource Management attribute codes.

Mobile Service

A range of new offline capabilities creates a better user experience for field personnel. Onsite engineers can now access work instructions, forms design capability and new material workflows even when they're offline.

Proof of presence

As a part of commercial compliance, onsite engineers are often required to obtain a customer signature as a proof of presence. Being paperless makes it easier for field engineers to log proofs of presence against transactions in a service call.

Links hub

Every user starts the Mobile Service app on a new landing page that serves as the navigation centre-point of daily functions. Users can conveniently and quickly access the most important functions at the click of a button.
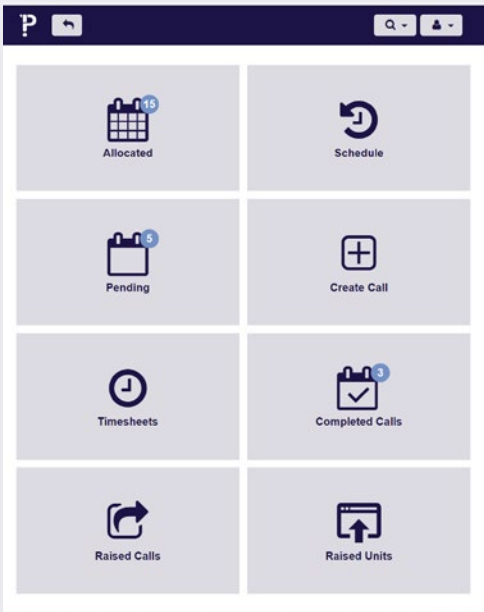

Materials order

Engineers can now request parts via a material requisition for either their van or service call. It is fully tracked within Pronto Xi Service, Inventory Management and Mobile Service workflows.

Requisitions can also now be created directly on Pronto Xi Mobile Service, eliminating the need to call the office. As a result, material requests during service calls are more visible and the stocking and distribution of supplies is more efficient.

Work Instructions

Work Instructions are a series of questions, tasks and notes that step an engineer through the work that they need to complete on a service call.
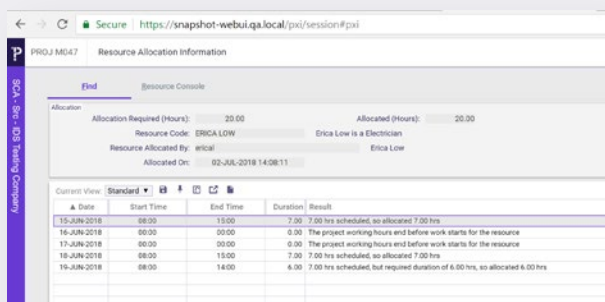
Businesses can now track the required procedures, ensuring that all mandatory activities of a service call are completed, every time.
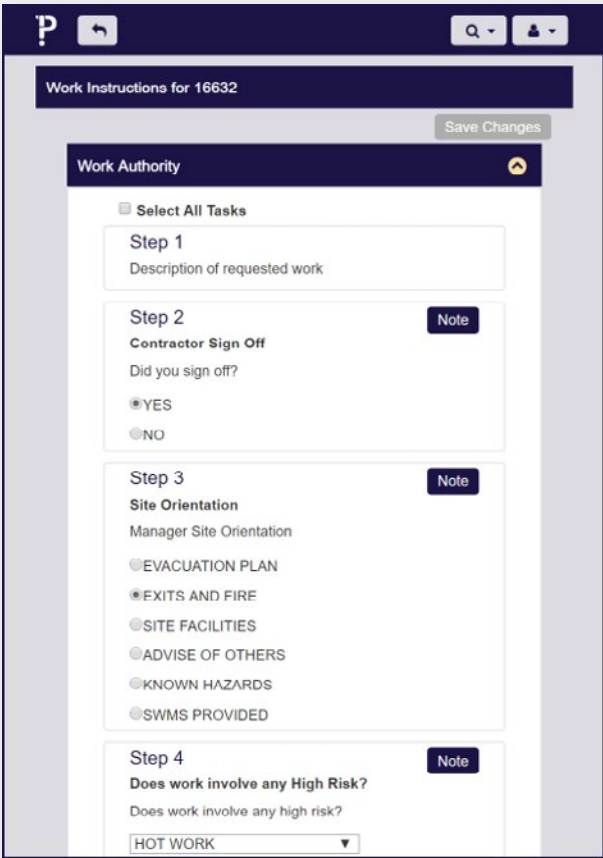
Resource Management

Exceptions screen

When allocating resources, assignment adjustments are often made automatically based on availability hours. To help Project Managers or Schedulers understand the reasons behind the adjustments, a screen has been added to record why the expected allocation did not match the desired outcome.

Quick filters

Quick filters are based on predefined attributes that speed up the scheduling process. Instead of manually going through a long list of resources, Quick filters make it easy to schedule multiple resource types with different skills sets.

Subcontractor compliance

To manage business operations risk, it is important to know when a subcontractor's mandated certificate or licenses have expired or are no longer valid. When raising a purchase order or a claim, an attribute can now be set up to check for any non-compliance.
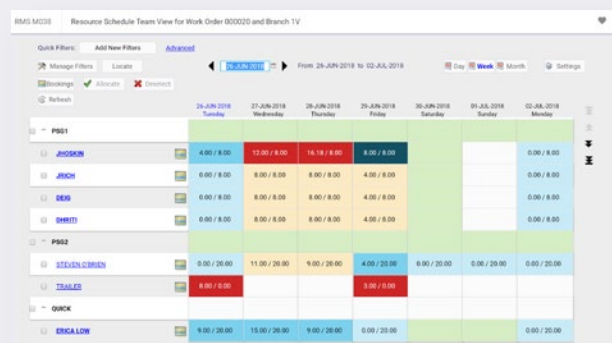
Accept and Decline workflows

Subcontractors or users can accept or decline work orders, projects tasks or rosters via email without logging onto Pronto Xi. This means that subcontractors no longer need to be set up or trained as Pronto Xi users, simplifying the workflow, reducing costs and making it easier to on-board a new resource.

Resource teams

People, equipment and resources are often allocated together on service calls, plant work orders or project tasks. These teams can now be predefined for faster allocation.

With the ability to auto-populate timesheets for an entire team and move resources in and out of teams with an audit trail, managers can now gain efficiencies by allocating resources quickly.
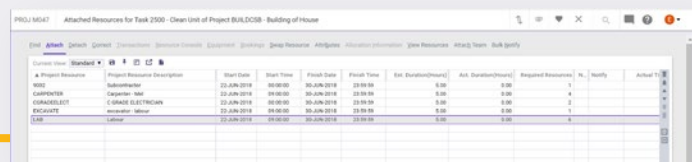
Generic Resources for Planning

Project Managers and schedulers are often required to plan work in advance to forecast workloads as well as plan for projects. To prevent any scheduling issues, generic resources have been introduced for planning purposes.

Generic resources can be replaced with actual resources when the project is approved and dates confirmed.

Maintenance management

Maintenance management now works seamlessly with Resource management to give a great boost to your maintenance productivity.

You can prevent scheduling issues and conflicts with planned maintenance of plant items by treating them as resources and updating their availability information. Generic resources can be associated with your Maintenance Labour Categories. You can also group and assign resources to work orders in one go as a team, simplifying maintenance planning.

Technology

Cipherise

Cipherise is an innovative and user-friendly authentication method that enhances Pronto Xi's enterprise grade security by enabling multi-factor authentication through a smartphone. This creates a highly secure way of storing credentials on a device that a user owns instead of using a central server.

Simple and easy to use
Cipherise creates a frictionless login experience that allows the use of passwords with a strong, patented authentication technology called OneTICK. This method makes passwords highly secure as they are not entered in a text-format using the phone's keyboard. Cipherise makes Pronto Xi a truly secure ERP that runs your business.

Decentralisation
Passwords are never transmitted over the network nor are they stored centrally in a single server. Instead, they remain protected on the smartphones ensuring that authentication details of employees remain distributed rather than consolidated in a single, risky location.

Single sign-on
Users can now login to Pronto Xi and other supported applications through a single sign-on. Once authenticated, users don't need to go through the login process again. This makes the login process frictionless but highly secure at the same time.

Supported applications
Cipherise is currently supported on Pronto Xi Web Interface, Employee Portal and Mobile Service.
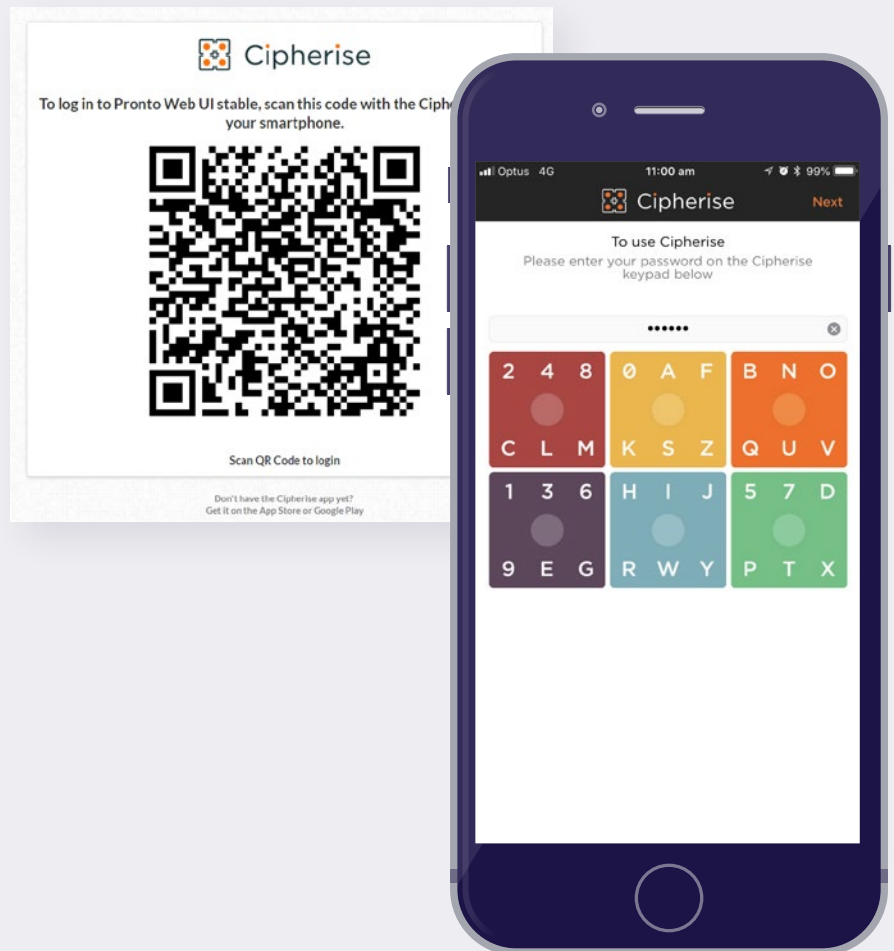
Local agent

Local agent is a Windows application that grants the Web Interface secure and restricted access to a user's computer for work that previously required the Enterprise Client. This enables end users to have one interface for all their work, including Web-only features such as Workspaces.

Cloud printing

Google Cloud Print substantially reduces the complexity of printing to on-premises print devices from the Cloud. Available with TrueForm Neo 2.0 and later releases, a VPN is no longer needed to transfer print jobs to the device.

Signed URLs

Providing approvals for just about anything just got simpler and more convenient by using Signed URLs. These time-limited URLs come straight to the inbox. A simple click triggers the approval action without the need to login to Pronto Xi, making it ideal for managers on the move.

Touch navigation

Touch navigation for the Web interface has been enhanced, with the introduction of a navigation bar. Paging between records is now highly convenient without the need for a physical keyboard.

Pronto Cloud EverSync

EverSync is a disaster recovery solution that continuously protects business data and enables critical applications to be back online rapidly when a disaster strikes. The applications can be up and running in the cloud in as little as 20 minutes, with data being up-to-date within 10 seconds before the disaster struck.

By virtualising all business applications, hardware compatibility between active and backup infrastructure is no longer required, saving costs and headache.

Disaster situations can be simulated and failover processes tested at any time to ensure readiness when an actual disaster strikes.

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For an obligation free demonstration, please contact:
Applied Business Technology Group
Level 1, 37 Epping Rd. Macquarie Park NSW 2113 Australia

E. info@abtgroup.com.au
T. +61 2 9878 7111
F. +61 2 9888 2720
w. www.abtgroup.com.au