

PRONTO
SOFTWARE

PRONTO xi 780

Unveiling
the future



Game-changing business management software redefining efficiency and performance



At Pronto Software, we're continually seeking ways to make Pronto Xi better and work harder for your business.

With new features, capabilities and functionality, the new era of Pronto Xi is here – and Pronto Xi 780 are the updates and advancements you need to know about.

Pronto Xi 780 boasts a sleek interface for streamlined workflows that enhance user experience and productivity. Need peace of mind for you and your business? We've fortified security measures to safeguard data. We've added new features and capabilities covering Finance, Supply Chain Management, Service Management, Retail, and Payroll & Resources. The improved analytics and reporting functionalities of these new features are designed to optimise efficiency and empower your decision-making. Furthermore, the addition of a robust web client expands accessibility, allowing you to access critical information securely – anywhere, anytime.

Get ready to experience the future of business management with Pronto Xi 780 and unlock new possibilities for success.

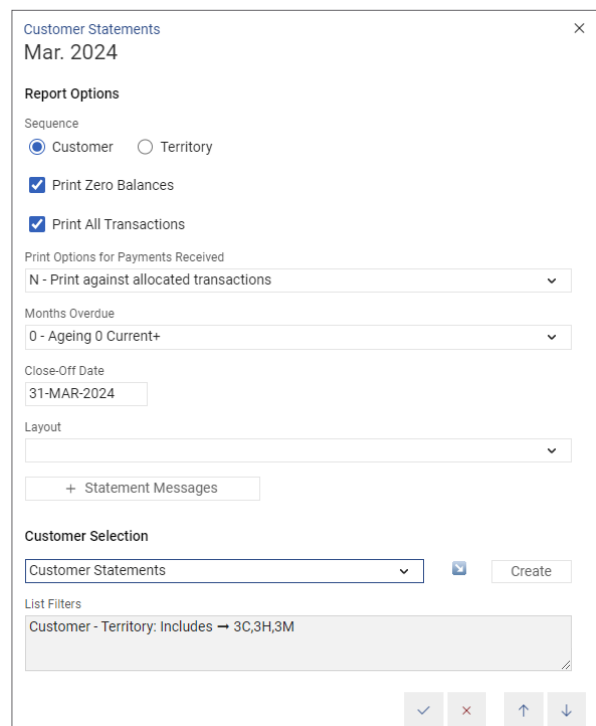
List Manager

Introducing our new List Manager. Giving you the ability to save a set of selections on all major data types, we've also exposed all fields and ensured selections are distinct.

Create temporary lists for a one-off need, or use saved lists to dynamically update information or generate a fixed set of records. Need a filtered result set? List Manager can do this, too.

These feature-rich list types are available to enhance processes:

- **Standard** – populate lists using defined filters
- **Master** – populates lists from data in attached lists (standard, exclusion or custom)
- **Exclusion** – populates lists using defined filters excluded from those attached to a Master
- **Global Exclusion** – populates lists using defined filters from data excluded from any list result
- **Custom** – populates lists from data taken from the import feature (e.g. csv)



The screenshot shows a software interface for generating customer statements. The window title is "Customer Statements" with a close button (X) in the top right corner. Below the title, it says "Mar. 2024".

Report Options

- Sequence: Customer Territory
- Print Zero Balances
- Print All Transactions
- Print Options for Payments Received: N - Print against allocated transactions (dropdown)
- Months Overdue: 0 - Ageing 0 Current+ (dropdown)
- Close-Off Date: 31-MAR-2024 (text input)
- Layout: (dropdown)
- + Statement Messages (button)

Customer Selection

- Customer Statements (dropdown) [Save icon] [Create button]

List Filters

- Customer - Territory: Includes → 3C,3H,3M (text area)

At the bottom right, there are four small icons: a checkmark, an X, an up arrow, and a down arrow.

Example: New customer statement screen using List Manager



Foundation

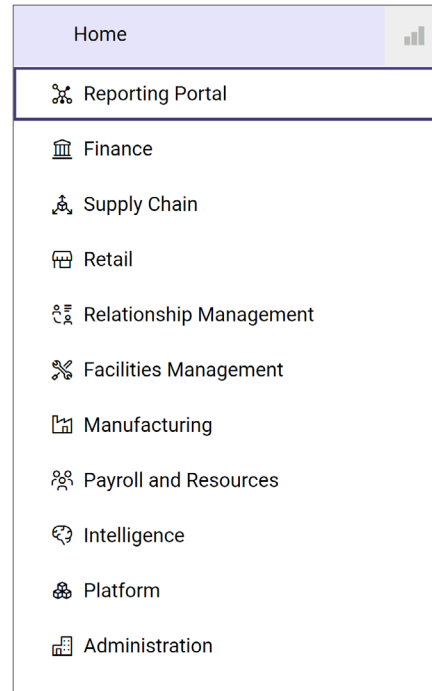
Web Client

Icon Support

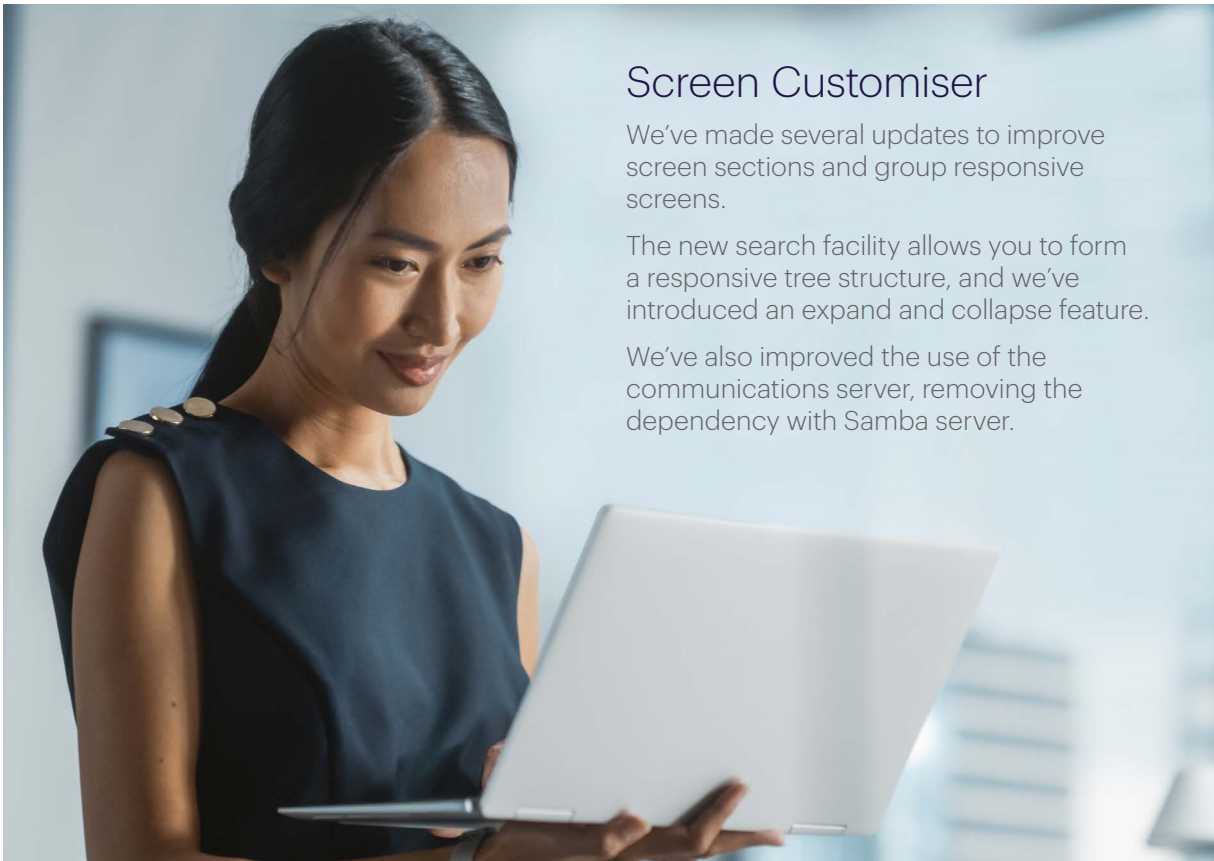
We've introduced a standardised list of icons to the web client. The icons improve usability, enhance the user experience, and make the system more accessible to a wider range of users.

User Experience

Gain more control over your experience with web client. Define which information is displayed, hide columns in data grids, pin relevant screen sections, and prioritise the sections that matter most to you.



Pronto Xi Menu



Screen Customiser

We've made several updates to improve screen sections and group responsive screens.

The new search facility allows you to form a responsive tree structure, and we've introduced an expand and collapse feature.

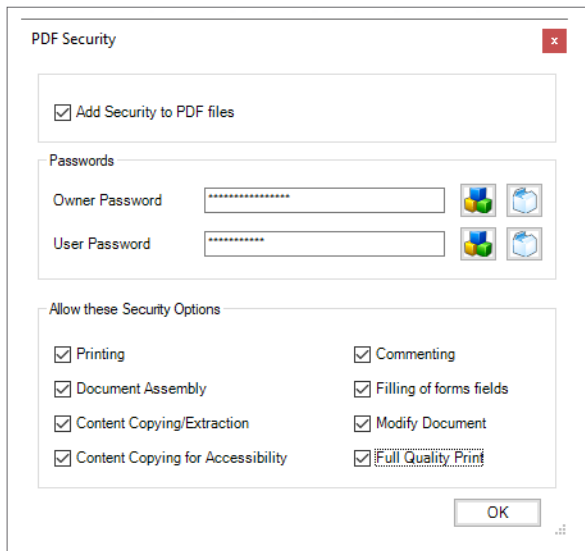
We've also improved the use of the communications server, removing the dependency with Samba server.



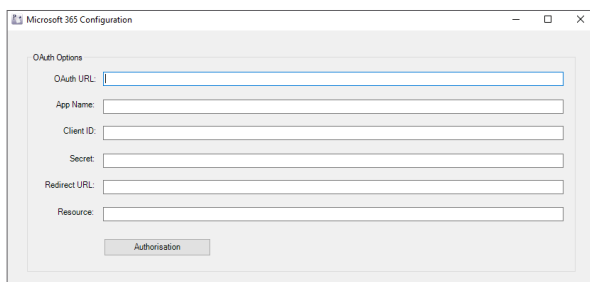
The latest TrueForm Neo solution is almost **10x** faster than its predecessor

Pronto Xi TrueForm Neo 3.4

New features include the ability to generate PDF reports with enhanced security features, and send emails through the cloud via Microsoft 365 and Google.



PDF Security Settings



Example: Cloud email settings

Pronto Cloud – Cloud services

Identity access management

The Pronto Software Identity and Access Management (IAM) solution offers secure, anytime access to Pronto Xi and related applications, such as IBM Cognos Analytics, Employee Portal etc.

Pronto Software IAM provides Single Sign On (SSO) & Single Log Off (SLO), Multi-factor authentication (MFA), Lightweight Directory Access Protocol (LDAP) integration and Active directory (AD), Azure AD and Okta integration for user authentication and control.

Pronto IAM is key to enhancing strong security posture and control ensuring only authorised users have access to critical business systems.

Containerisation

Pronto Cloud's containerisation is an enterprise, production-ready platform which provides multi-cluster Kubernetes management to support our Pronto Xi ready container stack such as Pronto Xi WebUi, Pronto IAM, FileShare etc via a modern delivery model. This platform supports minimal to no service disruption during upgrades and can also auto scale, self-monitor and auto recover.





Financials

Bank reconciliation

Automatically import bank line statements into Pronto Xi by simply authorising the business accounts to be linked.

Pronto Software partners with Basiq, a secure and accredited Consumer Data Right platform for open banking, to retrieve the data. Most Australian banks are connected to the Basiq platform, with New Zealand-based banks expected to be supported by the end of 2024.

General Ledger

We've modified several screens – including the journal process, standing journals and tax cycles – to make them simpler and easier to work with.

And, we've fitted out the list processing feature for when you need to select a General Ledger account range for processing, such as setting cash flow codes.

Accounts Payable

We've improved the following popular functions to create a better user experience and workflow:

- Invoice entry
- Payment processing
- Copy suppliers
- Cancel payments
- FX revaluation
- Supplier hierarchies

We've added a new feature: convert pay to accounts. There's also a new field for creditor transactions – you can now store the settlement date when this is applicable.

Supplier lists (includes suppliers, transactions and commitments) are another new function in Accounts Payable.

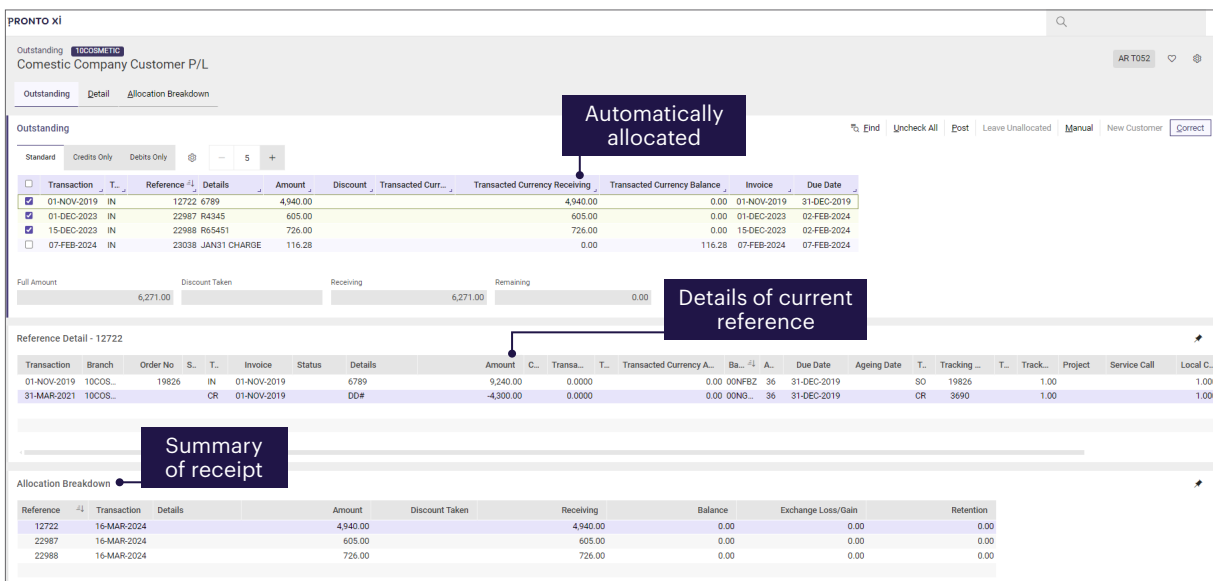
The screenshot shows a 'Selective Invoice Payment' dialog box. It has a title bar with a close button (X). The 'Options' section includes a 'Payment Type' dropdown menu set to 'E - EFT' and a 'Commitment Amount Warning Threshold' input field containing '9,999,999,999,999,988.00'. The 'Supplier Commitment Selection' section has a dropdown menu set to 'Selective Invoice Payment' and a 'Create' button. The 'Dynamic Filters' section contains two filter fields: 'AP Trans - Transaction Date' and 'AP Trans - Pay By Date', each with a trash icon. Below these is an 'Add Filter' button. The 'List Filters' section shows a list of filters: 'AP Trans - Transaction Date: Between 01-JAN-2000 and 03-APR-2024' and 'AP Trans - Pay By Date: Less or Equal To 03-APR-2024'. At the bottom right are four navigation buttons: a checkmark, an 'X', an up arrow, and a down arrow.

Example: New payment processing

Accounts Receivable

By completely remodelling the automatic mode in Accounts Receivable, we've transformed Cash Receipts. Pronto Xi now aims to perfectly match the receipt in the following order:

1. Balance of account
2. Single reference match (from oldest)
3. Summing references from oldest
4. Summing references from oldest but with all unallocated credits included



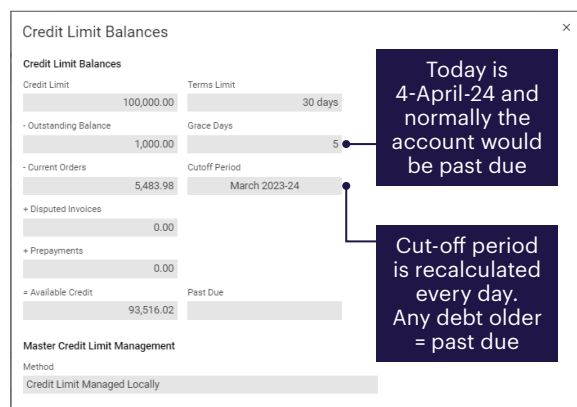
Example: Results screen

Welcome to improved workflows and new screen layouts in the following areas:

- Customer statements
- Receipt cancellation
- Customer archive
- Bulk credit allocation
- FX revaluation

In addition we added two new features:

- **Transaction management** – a central spot to perform all day-to-day tasks related to customer invoices etc
- **Grace days** – effectively extends your customers days to pay so they don't go on credit hold in the new month



Example: Grace Days added to credit checking



Payroll & Resources

Resource Scheduler

New updates within the scheduler allow you to define the day and time ranges shown, enabling your users to hide non-workable times and days. Users can now see more screen real estate, making scheduling more efficient.

Several improvements now help users know who is the right resource to allocate a call to. On the resource management view, you'll now see the number of active and on-hold bookings for that resource. Finally, we've introduced the ability to collapse the bookings pane so that if resources have multiple bookings within a time range, they collapse to a single-line view.

Payroll & Resources

Changes to the Payroll & Resource management screens and workflows enable your users to work more efficiently, giving them the ability to access more information at their fingertips and minimise the number of keystrokes required to perform an action.

We've revamped the pay run experience so you have all the necessary information for reconciling payroll. Payroll officers can now access leave balances, last pay transactions and timesheets, while reviewing the current pay. Additionally, we've significantly improved termination processing.

Employee Portal

The Employee Portal has a new look and feel, and simplified navigation tools. Managers can now estimate leave balances for employees up to a future date, helping manage employee shutdown periods where leave may not be available.





Distribution

Items Maintenance

We've refreshed the Item Maintenance screen and introduced a new item template for maintenance, giving you the ability to enter, correct and view information based on a business requirement. Importantly, templates can be defined for individual item types and other configurations.

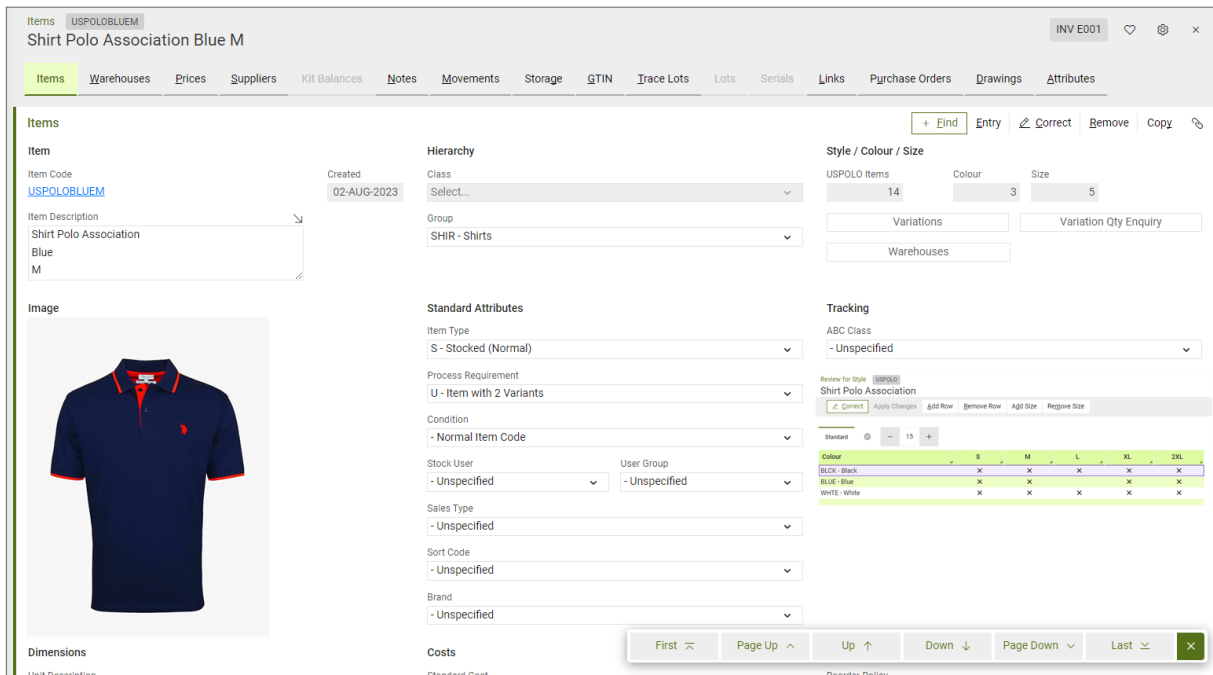
Item Variants

Now aligning more closely to its real capability and supporting five characteristic levels not three, the Style/Colour/Size functions were renamed to Item Variants.

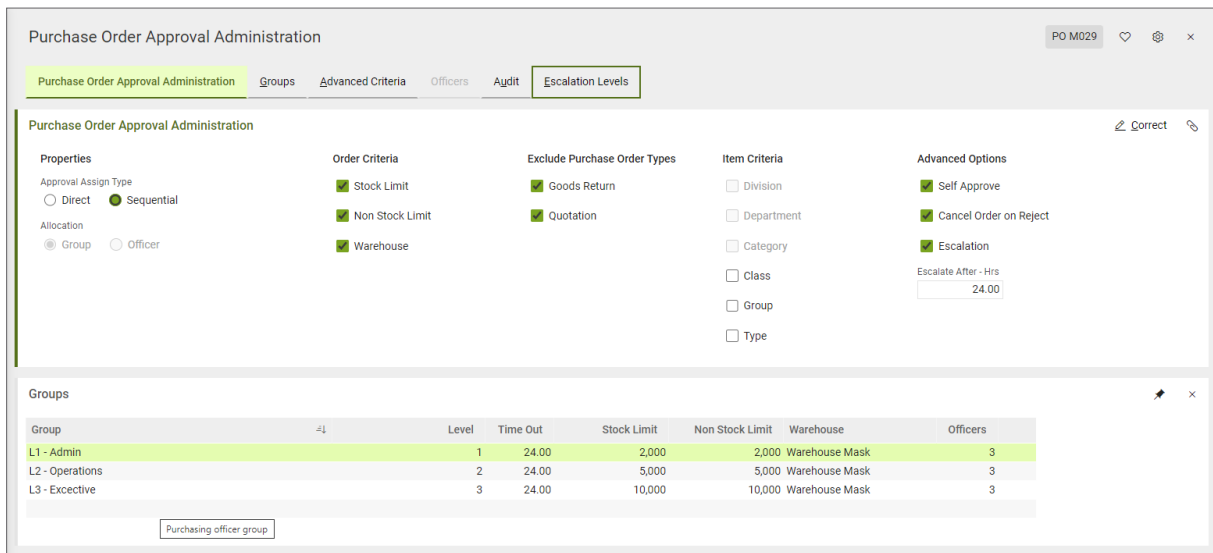
All entries, as well as the correct and view functions, have been simplified and consolidated to the Item Maintenance screen.

We have also simplified Item Variants for Purchase Orders and Sales Order entries.





Example: Item Maintenance screen template for shirts with different colours and sizes



Example: Simplified purchase order approvals administration

Purchase Order Approvals

We've listened to your feedback and improved the usability and process workflows of Purchase Order Approvals, without disrupting the original design.



Retail



Pronto Point of Sale App

The Pronto Point of Sale App (POS App) has undergone a series of changes. Previously, the POS App stocktake process could only handle one email address for stocktake count submission; it now supports multiple emails. We've also introduced Tap to Pay on iPhone, allowing customers to use additional handheld devices during heavy transaction periods without any additional hardware cost.

Pronto Xi Offline POS

Network or server outage? With Pronto Xi Offline POS you can still conduct transactions. Once the server connection is restored, all offline transactions sync back to the Pronto Xi server.



B2B eCommerce

Pronto Xi Avenue – Keeping things streamlined

A new version of Pronto Xi Avenue is available which simplifies and fast tracks implementation, updates and upgrades, and ongoing management of your eCommerce site.

This version of the eCommerce application will allow current and future customers to receive continuous updates including patch releases, security updates and any feature enhancements as they become available.

Easy onboarding with Global Settings

Implementing Pronto Xi Avenue just got easier with new Global Settings. Instead of making HTML changes to gain the wanted look, just answer some business questions, set colours, fonts and style choices to be ready to begin selling.

Content made easy with Page Builder

Get ready to design and customise content more easily with Pronto Xi Avenue's feature page builder.

Now you can create unique and engaging shopping experiences without the worry about the code or how the ERP-driven product and pricing data is configured. This could be for simple changes to the home page as well as being able to quickly create pages for new product launches, news articles or any other informative pages. Design and customise your pages and while each one effortlessly remains on brand as they inherit all style choices from the Global Settings.

Enabling website optimisation with Horizontal Scaling

As website traffic normally fluctuates, any abnormal and sudden spikes can affect the performance of the system, especially if the server capability has only been provisioned to handle normal traffic.

Pronto Xi Avenue now offers Horizontal Scaling options that helps business applications run with greater efficiency and support website operations for a more reliable user experience.

Pronto Xi Avenue does this by adopting a microservice architecture where the application is broken into independent scalable parts and run in their own dedicated server resources to achieve optimal load balancing. This way applications storage and processing power can be increased and optimised, enhancing overall website performance.



CRM

Integration with Vision6

We now have a new CRM integration with Vision6, one of Australia's most reliable SMS and email marketing platforms.

Vision6's main features include:

- Email marketing
- Lead generation
- Collaboration
- Advanced tool set





Supply Chain

Proof of Delivery App

We've updated the Proof of Delivery (POD) App version 2.0.1+ to group all orders in a single manifest heading to a single destination, providing insight and visibility for drivers to optimise their route.

Also, the POD App now provides the ability to receive consolidated proof of delivery information for grouped orders.

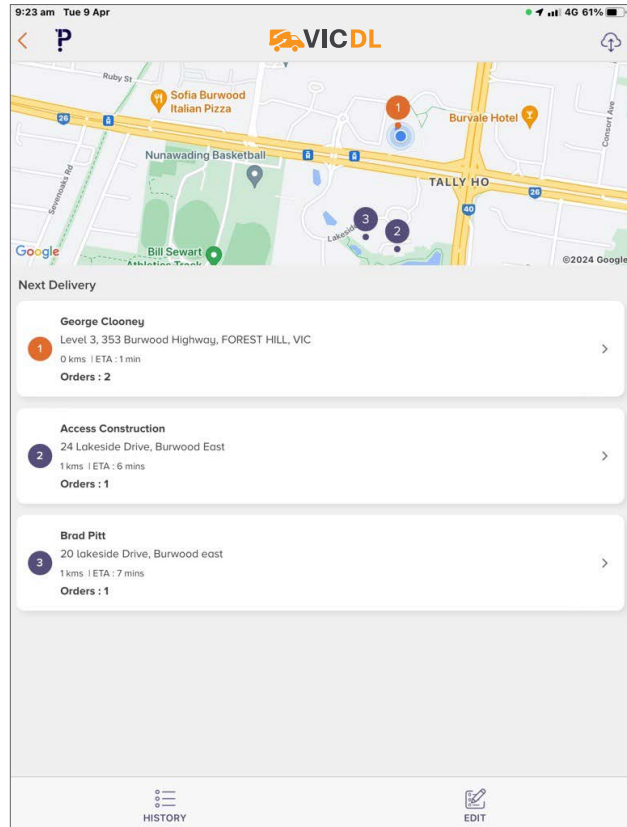
Lastly, the POD App now enforces a minimum number of images during delivery.

Radio Frequency

Visibility and trappable real estate was once lost on small screens for our radio frequency users. Now, with a simple configuration, you can access full radio frequency screens without the Web Client function (which is only relevant to desktop users).

Integrate with Gamma Solutions

We have partnered with Gamma Solutions, the leading provider of barcode scanning and printer solutions which sync with your Pronto Xi ERP to provide your business with an optimise supply chain processes. As industry leaders, they can help advise the best barcode scanning, printing, or wireless hardware solutions for your business needs.



Example: POD App consolidated deliveries for same destination





Asset & Facility Management

Service Management and Pronto Service App 770.4 onwards

Transaction Start Code

We've added a new field called Transaction Start Code to the Service Centres code table. Enter the code to this field and it will define the action that initiates the activity.

New Call Type Fields

Two fields – RM Attributes and RM Attribute Groups – now appear on the Call Type code table. Enter the resource attribute status of the service centre and the attribute group code, respectively, in these fields.

Custom date fields

We've introduced a new exportable procedure. Use this procedure to customise date fields in the Pronto Service App.

Code tables validations

We've applied Validations to the Action Code (SV), Call Priority (UR), Call Type (SC), and Service Centres (SL) code tables. Now, when you edit these tables to set up default data, the data is first validated against the existing data in these tables. If the field does not exist, it's deemed invalid and you'll see an error message.

Pronto Service App

We've added the following new functions to the Pronto Service App:

- **Screen Configuration** – configure general screen settings
- **Registered Users** – manage your user licensing
- **Service Engineers** – maintain the details of your app engineers
- **Configuration** – view and maintain a work

instruction set

We've also made further enhancements to API Configuration and Licence Control, and have added a Hide field to the Pronto Service App screen (Screen Administration), which allows you to hide or show the selected field in the Pronto Service App.

Work Instruction Updates

Group Details for Set screen

The Parent Group field is now called Dependent Group Code. It now allows you to select only those entries with a lower sequence number as a dependent group.

Element Details for Group screen

We've updated the Work Instruction Element Details for Group screen with the following changes and additions:

- **Parent Element Sequence and Parent Element ID** – these two fields allow you to enter the sequence number that defines the order in which the elements are displayed on the Pronto Service App and the parent element ID, respectively
- **Type** – this field now supports an Input Range element type
- **Lines Reseq** – using this mode, you can re-sequence elements of a group into the required sequence order in increments of 1.0

Call screen updates

We added a Signature & Attachments mode to the Safety Details for Call screen, so you can view the engineer's sign-off signature for the service call and any transaction attachments.

We've also added an RM Attributes mode so you can view and maintain the resource attributes for the service item.

Add Work Instructions to Call Number

You can now add a new work instruction to a service call with by using the add Work Instruction Set mode function under instructions.

Signature & Attachments

We added a Signature & Attachments mode to the Safety Details for Call screen so you can view the engineer's sign- off signature for the service call and any transaction attachments.

Engineer Scheduled Attendances

The Engineer Scheduled Attendances screen now has a Schedule Lock field so you can edit the lock flag when the schedule status is not complete.

Security & Access Controls

We have added new attributes to Mobile servicer roles and engineer screens which allow you to better manage access to the Pronto Service App. Also manage the user access granted to add materials.

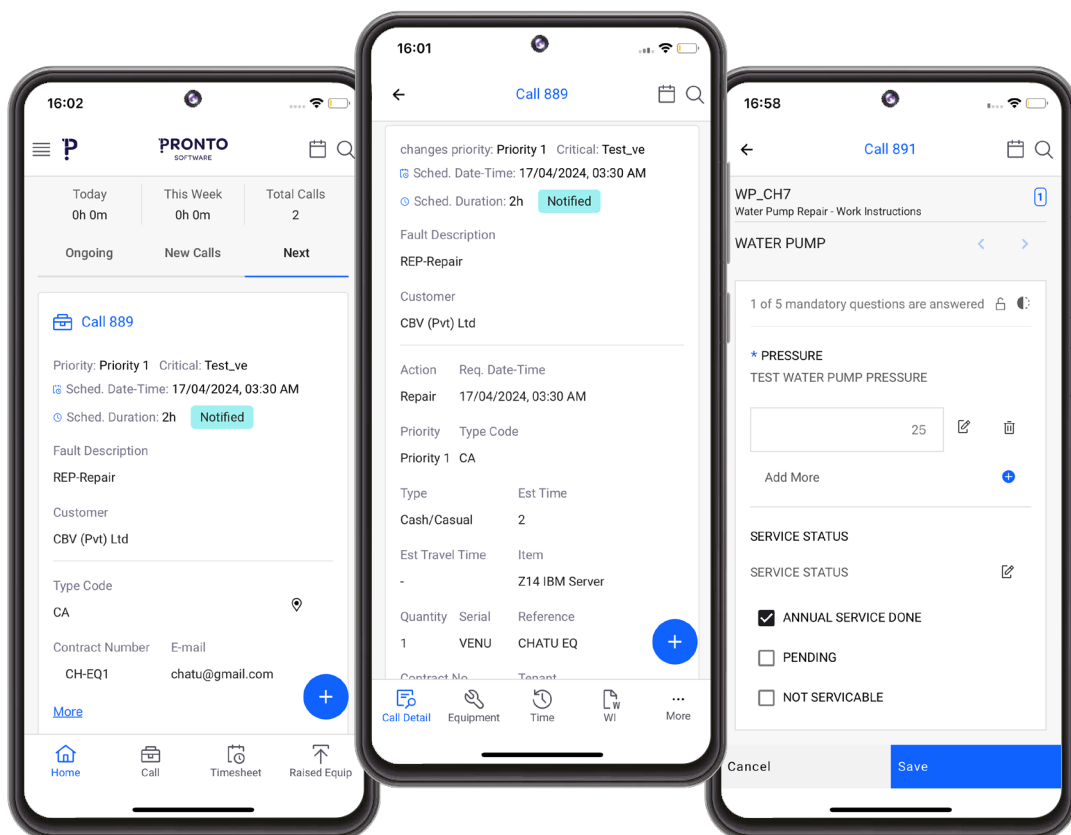
770.5

Engineer allocation

Need to send a mail alert to an engineer, but they don't have a login ID assigned? We've added a new public exportable procedure called public-send-mail without-login to enable you to get in contact.

Load Default mode

The Load Default is a new mode that allows you to load the default Mobile Service template. (But note, you can't maintain or delete this default template.)



Example: Pronto Service App generic screens



Pronto Service App releases

1.2.0 – October 2023

The release of version (1.2.0) of the Pronto Service App in October 2023 saw a wave of improvements tailored to streamline operations and make the user experience better.

We introduced pivotal features, including mobile service APIs for greater accessibility, comprehensive home screens that streamline navigation, and advanced call management tools, such as ongoing call tabs and detailed call information.

We've improved scheduling and timesheet functionalities, and optimised equipment and material flows to streamline operations. And we've expanded invoicing capabilities with features like printing and emailing service dockets and invoices to help you manage transactions more efficiently.

1.3.0 – December 2023

December 2023 marked the arrival of version 1.3.0. The release introduced further enhancements, like timely notifications and responses for new service calls, improved communication capabilities for service dockets via email or print options, and streamlined invoicing processes through the printing and emailing of invoices.

We also enhanced our offline functionality, giving you the ability to add attachments without internet access. The new logout feature optimises security.

1.4.0 – February 2024

February 2024 saw the release of version 1.4.0. Highlights included improvements aimed at refining the user experience and bolstering app functionality.

Now, you have the ability to add equipment during call edits when specific details are pending, and utilise robust global search capabilities and offline functionality with limited online features. We've made intuitive UI/UX changes, improved error handling and bolstered security measures based on recommendations we received from external audits.

1.5.0 – April 2024

In April 2024, version 1.5.0 arrived with even more improvements and benefits to businesses. This update featured streamlined call creation processes and enhanced invoice management giving you the ability to edit invoice lines. We also improved the display of serial equipment attributes.

The bonus for businesses and engineers? You'll gain greater control over equipment data and create smoother workflows when usability issues arise.

Future releases

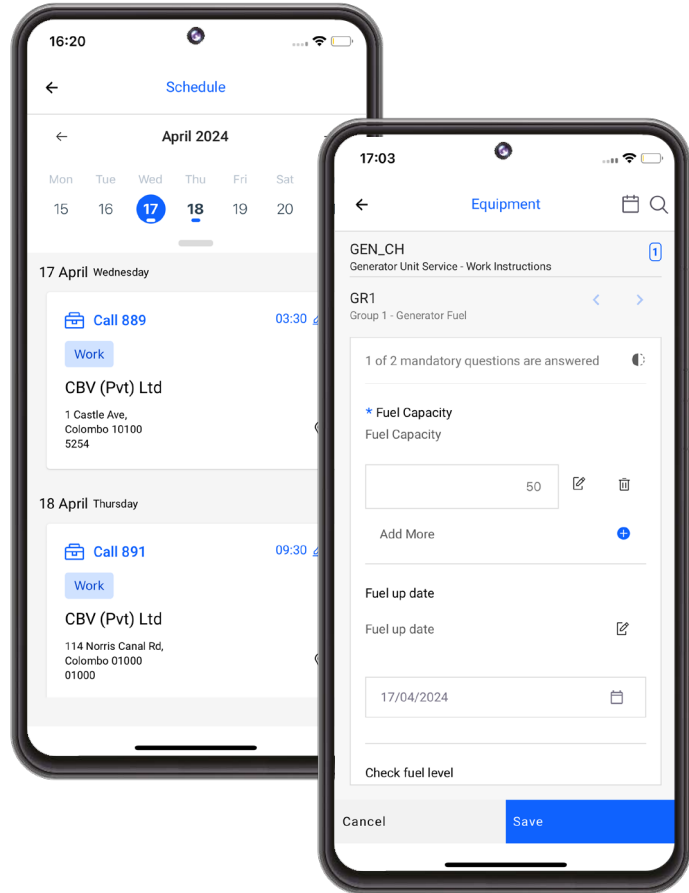
Future releases promise further refinements and even better features. We're working on restructuring work instruction response behaviour, adding continuous location tracking for engineers, integrating new payment methods, and revamping local time functionalities.

As always, we'll keep enhancements to the user experience front of mind, fixing any bugs and ensuring the Pronto Service App continues to meet the evolving needs of businesses.

Project

Project Executive Summary

An exciting new tool, the Project Executive Summary allows you to see projects at a high level – a bit like a pivot table in Excel. We've added a series of pre-defined templates to get you started and support drill through analytics so you can view all the relevant information.



Example: Engineer Schedule and Service Equipment screen

Actual Vs Budget Vs Forecast [By Branch] As at 04-APR-2024 08:04:00

Branch PROJ M093

Period: March 2023 - 2024 Where: Status Equal To I Suppress Total

Standard - 20 +

Code	Branch	Invoiced	Cost	Profit	Actual Margin %	Budget Revenue Inv. Var	Budget Cost Inv. Var	Budget Profit Inv. Var	Budget Margin %	Forecast Revenue Inv. Var	Forecast Cost Inv. Var	Forecast Profit Inv. Var	Forecast Margin %
1	Head Office	0.00	16,752.87	-16,752.87	0.0%	1,586,093.55	586,093.55	1,000,000.00	63.1%	1,586,093.55	586,093.55	1,000,000.00	63.1%
ADE	Adelaide	110,534.00	1,044,832.12	-934,298.12	-845.3%	2,023,834.06	1,614,404.06	409,430.00	20.2%	2,023,834.06	1,614,404.06	409,430.00	20.2%
MELB	Melbourne	8,461,555.01	3,722,421.81	4,739,133.20	56.0%	23,514,858.76	19,574,333.41	3,940,525.35	16.8%	23,514,858.76	18,897,200.19	4,617,568.57	19.6%
SYD	Sydney	2,000.00	1,548.24	451.76	22.6%	5,746.90	5,746.90	0.00	0.0%	5,746.90	5,746.90	0.00	0.0%
	Grand Total	8,574,089.01	4,785,555.04	3,788,533.97	44.2%	27,130,533.27	21,780,577.92	5,349,955.35	19.7%	27,130,533.27	21,103,534.70	6,026,998.57	22.2%

Example: Based on a template



Business Intelligence

IBM Cognos Analytics 11.2.4 Fix Pack 4

IBM™ Cognos™ Analytics* 11.2.4 Fix Pack 4 is a roll-up of product corrections that have been made since the long-term support release of IBM Cognos Analytics 11.2.4. Corrections include the latest security updates.

Reports and Dashboards

We've created new pre-designed operational reports and dashboards, while also updating existing reports to seamlessly support Pronto Xi 780's new features and functionality. These reports now include comprehensive payroll compliance reports.

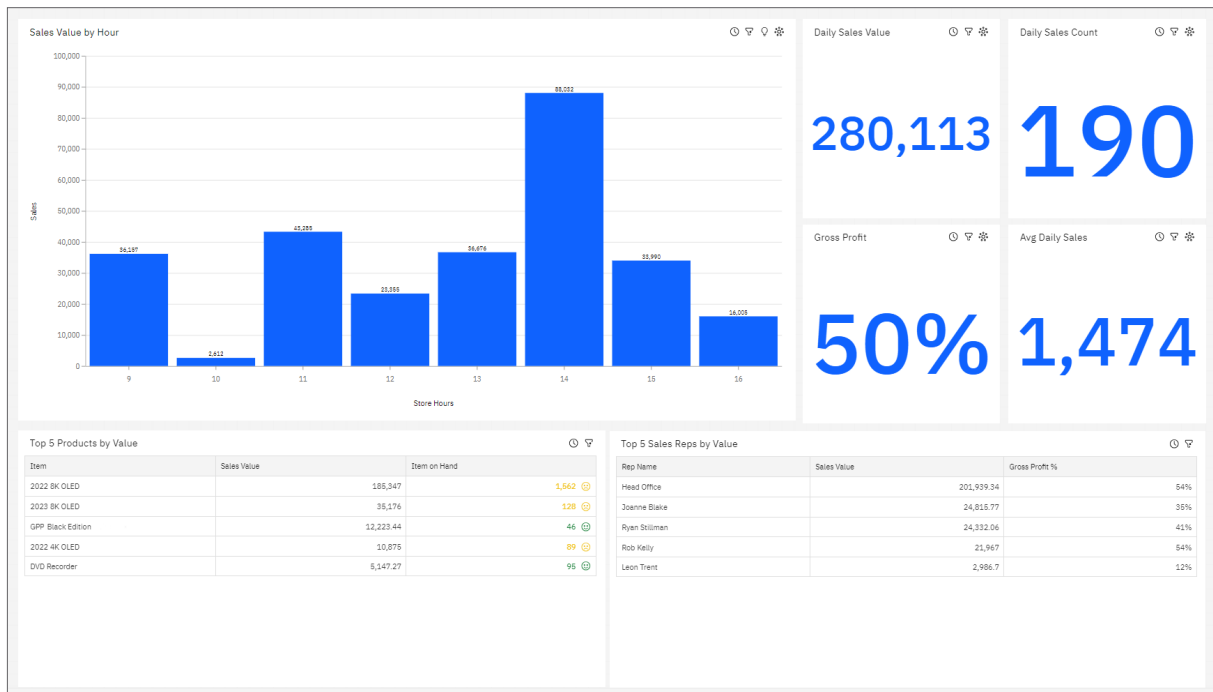
Dynamic Query Mode data sources and content

Dynamic Query Mode (DQM) and Compatibility Query Mode (CQM) are the two query modes supported by IBM Cognos. Currently, we base all our core packages and reports on CQM.

DQM is a 64-bit java query engine and, for several years, IBM's preferred query mode.

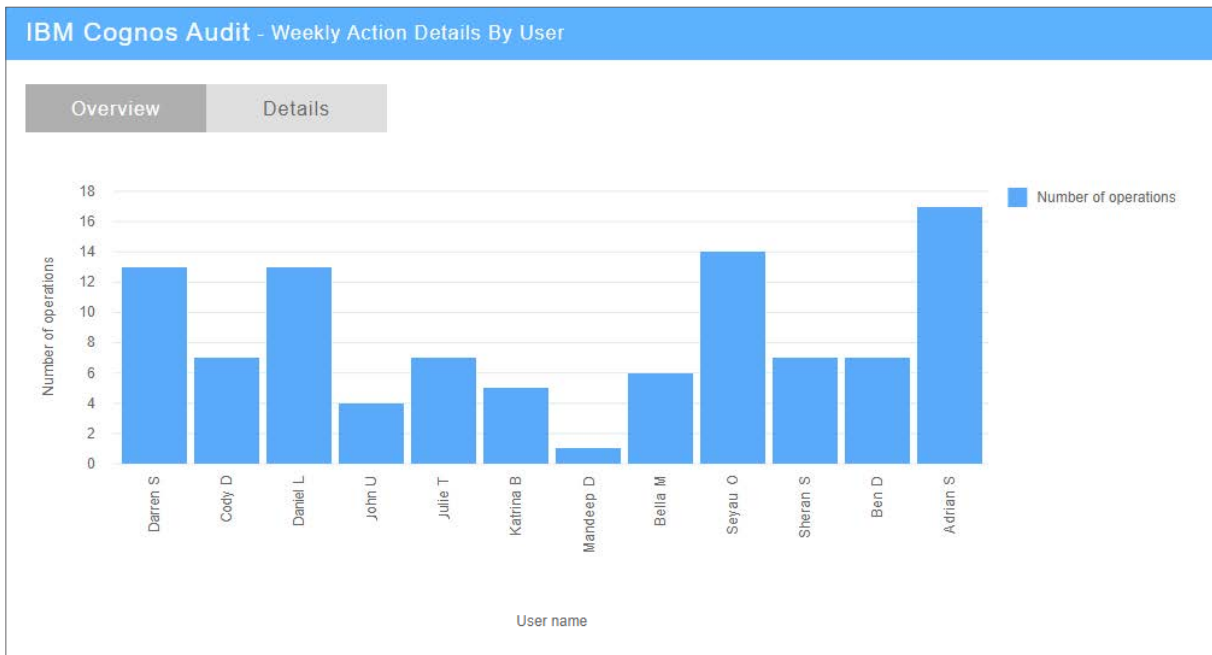
As all the latest features and functionalities in IBM Cognos Analytics are built on DQM, it's important for us to migrate from CQM to DQM. The migration allows us to leverage the benefits of the latest IBM Cognos releases.

While we plan to continue supporting existing CQM packages and their content – starting with version 780 – all new content and their data sources will be based on DQM. Additionally, we plan on converting existing core packages and reports to DQM.



Example: AI-powered self-service dashboards

*IBM and Cognos are trade marks of International Business Machines Corporation, and are registered in many jurisdictions



Example: Audit reports – they’re a good way to view information about content activities in the logging database

IBM Cognos Audit Database

Unlock the power of your data with IBM Cognos Analytics Audit functionality. Gain valuable insights into your business’ usage patterns through the comprehensive set of audit reports. Discover the true impact of your business operations, with reports covering usage frequency to user engagement.

Use these audit reports to optimise capacity planning, monitor performance, and identify and streamline unused content.

IBM Cognos Analytics Audit puts you in control, empowering you to make informed decisions that drive efficiency and maximise the value of your Pronto Xi Business Intelligence.

Data Warehousing Updates

To enhance our data warehouse solution, Pronto iQ is introducing Change Data Capture (CDC) technology. CDC enables database level replication based on an event-driven basis.

This facilitates low latency, near real-time data transfers that quickly and easily replicate Pronto Xi data into enterprise-level data warehouses. The benefit? Timely decision-making based on accurate reports.

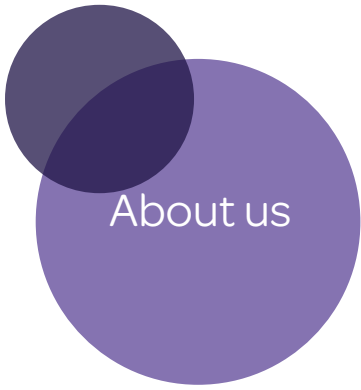
Pronto Xi BI unlimited licence for unparalleled insights

Give your entire organisation access to the full power of IBM Cognos Analytics with our Pronto Xi BI Unlimited licences.

Effortlessly report on data from various sources – including external financial systems, sales tools, online platforms and more – all within IBM Cognos 11.

You’ll gain the ability to leverage cutting-edge AI technology to analyse data and uncover hidden trends. Get a 360-degree view of your organisation and make data-driven decisions confidently and rapidly.





We are an Australian developer of award winning business management and analytics solutions. Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That’s why for more than 45 years, over 1,500 Australian and global organisations, across a wide range of industries, have trusted Pronto Xi to simplify their most complex challenges.

With headquarters and our Development Centre located in Melbourne, we have support offices and consultants based across Australia, as well as a global network of Resellers and Solution Partners. Specialised business units within Pronto Software have the expertise to assist you with pivotal technology – Digital Transformation with Pronto Woven, Cloud and Hosting services with Pronto Cloud and Business Intelligence solutions with Pronto iQ.

When you choose Pronto Software, you gain a team with deep industry experience, giving us the ability to understand your specific needs and build innovative solutions that drive business growth and revenue.

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