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Pronto Xi Service
Direct and serve

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 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.
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.
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.
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