



PIVOTAL CRM

EXTENDED PROFILE



OVERVIEW

Pivotal CRM is an Aptean software platform aimed at organizations of all sizes across a number of industries including manufacturing, healthcare, and real-estate. Built using the Microsoft .NET framework, it is ideal for Microsoft houses and any company looking to integrate a CRM solution with the Microsoft Office suite.

Low-cost flexibility is the key selling point of Pivotal CRM. A drag and drop visual designer allows non-technical staff to develop and deploy business solutions without the need for coding languages or third party input. Microsoft Outlook and SharePoint are also both embedded into the Pivotal CRM platform and integrated into the platform's configurable dashboards. Pivotal's Social CRM functionality allows users to access and manage their social media accounts from within the application.

Clients can choose from on-premise, hybrid or cloud deployments. Pivotal CRM is also available via desktop and any mobile operating system; iOS, Android, Blackberry and Windows Phone.



SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	Pivotal CRM
SOFTWARE FEATURES	
API ACCESS	✗
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✓
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
SUPPLEMENTARY FEATURES	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✓
MARKETING AUTOMATION	✓
SOCIAL RELATIONSHIP MANAGEMENT	✓
CUSTOMER SIZE	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
OTHER FEATURES	
MULTIPLE LOCATIONS	✓
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
MOBILE FEATURES	
IOS APP	✓
ANDROID APP	✓
NATIVE WEB APP	✓
HOSTING METHOD	

CLOUD	✓
ON-PREMISE	✗
FURTHER INFORMATION	
PRICING	Not Available

SOFTWARE SCREENSHOTS

Process definition: Incident man - Pivotal CRM - CDC Smart Client Framework

File View Shortcuts Tools Help

My Home Shortcuts History Toggle Task Pad

Home Accounts Employees Back Office Configuration Business Process Administration Business Processes

Process definition management All process definitions All teams

Process definition: Incident management v2

Process definition

Name: Incident management

Version: 2 Previous: Incident management v1

Type: Service process

Subtype: ITIL - Incident Management

Status: None

Process management

Owner: Conrad Green

Manager: Conrad Green

Incident management process according to ITIL, v2

Process classification

Category:

Group:

Code: Reference Number:

Activities Result codes Roles Business processes

Ordinal	Name	Subtype	Category	Assigned to employee	Assigned to team	Approval type	Valid
30	Incident identification	Initial	Task		Service Desk	Not required	☑
20	Incident logging	Intermediate	Task		Service Desk	Not required	☑
30	Incident categorization	Intermediate	Task		Incident Manage...	Not required	☑
40	Request Fulfillment	Final	Document		Incident Manage...	Not required	☑
41	Incident prioritization	Intermediate	Task		Incident Manage...	Not required	☑
50	Major Incident Procedure	Final	Document		Incident Manage...	Not required	☑
51	Initial diagnosis	Intermediate	Task		Incident Manage...	Not required	☑
60	Hierarchical escalation	Intermediate	Email		Incident Manage...	Not required	☑
61	Functional escalation	Intermediate	Deal		Incident Manage...	Not required	☑
62	No escalation	Intermediate	Other		Incident Manage...	Not required	☑
70	Investigation and diagnosis	Intermediate	Task		Incident Manage...	Not required	☑

Save & Close Apply Refresh Delete Process definition Cancel

0 Messages User: CRMWagner Government, CRMWagner Demo, ProcessITM...

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