



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

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:

Version:  Previous:

Type:

Subtype:

Status:

**Process management:**

Owner:  Incident management process according to ITIL, v2

Manager:

**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	<input checked="" type="checkbox"/>
20	Incident logging	Intermediate	Task		Service Desk	Not required	<input checked="" type="checkbox"/>
30	Incident categorization	Intermediate	Task		Incident Manage...	Not required	<input checked="" type="checkbox"/>
40	Request Fulfillment	Final	Document		Incident Manage...	Not required	<input checked="" type="checkbox"/>
41	Incident prioritization	Intermediate	Task		Incident Manage...	Not required	<input checked="" type="checkbox"/>
50	Major Incident Procedure	Final	Document		Incident Manage...	Not required	<input checked="" type="checkbox"/>
51	Initial diagnosis	Intermediate	Task		Incident Manage...	Not required	<input checked="" type="checkbox"/>
60	Hierarchical escalation	Intermediate	Email		Incident Manage...	Not required	<input checked="" type="checkbox"/>
61	Functional escalation	Intermediate	Email		Incident Manage...	Not required	<input checked="" type="checkbox"/>
62	No escalation	Intermediate	Other		Incident Manage...	Not required	<input checked="" type="checkbox"/>
70	Investigation and diagnosis	Intermediate	Task		Incident Manage...	Not required	<input checked="" type="checkbox"/>

Save & Close Apply Refresh Delete Process definition Cancel

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

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