

THE APTEAN PIVOTAL CRM ADVANTAGE

DATA SHEET

In today's business climate, your CRM needs to work the way you work. It's got to be fast to deploy and easy to use. Flexibility has to be in the box – not bolted on. That keeps your company ahead of its competitors and the sales team in front of your customers. Pivotal CRM provides insights that can set you apart from the competition while delivering real ROI to the bottom line.

You need facts to choose a proven, best-fit CRM system for your business – based on your business's needs. And best-fit is important as proven by customer loyalty: the average Pivotal CRM customer has been using the solution for more than eleven years.

Here are some of the key differences between Pivotal® CRM, Microsoft® Dynamics CRM and Salesforce.com®:

CONFIGURABILITY

Pivotal CRM's customer can quickly deploy business processes by eliminating the need for a development environment and utilizing a visually connected action based designer. Pivotal CRM also provides visual workflow, a drag-and-drop, flowchart style designer that lets users create a business process in both the production and customization environment. This saves time and money, and empowers the user to precisely model their own unique processes.

- No coding necessary, configuration can be performed by non-technical staff
- Configuration requires only standard IT skills, not specialized training or armies of outside consultants
- Work within a 'whiteboard' environment
- Directly manage data and automate everyday routines

EXCHANGE INTEGRATION

Pivotal CRM features the most integrated and intuitive MS Office based CRM solution available today. Deep and seamless incorporation of MS Outlook functionality with SharePoint integration provides a familiar user experience. Plus—the Pivotal platform is based on Microsoft.NET technology that provides task based navigation, easy customization, and a smart client user interface, resulting in high user adoption and a low total cost of ownership.

DASHBOARDS

One of the many reasons Pivotal enterprise dashboards stand out in the market is because they're built around a real-world workflow and have a role-based approach, empowering you to build state-of-the-art dashboards.

- Extensive interactivity
- Drill-down and hover-overs
- Quick and easy configuration

MOBILE CONNECTIVITY

Aptean Pivotal mobile CRM solutions keep you connected to critical data, wherever you are. By making CRM available via mobile platforms, you can turn down time into productive time.

KEY FEATURES:

- Online/Offline mobile client
- Tablet compatibility
- Bi-directional synchronization

CUSTOMIZATION TECHNOLOGY

Flexibility is the cornerstone of the Pivotal CRM advantage.

Extreme architectural flexibility cuts down on the time and cost of customizing Pivotal CRM solutions and allows businesses to create

the internal processes and external customer experiences that fit their strategy and vision.

SOCIAL CRM

Aptean Pivotal's award-winning Social CRM embeds functionality into your existing CRM system and enables you to use Twitter, LinkedIn, Facebook, and InsideView to find relationships, manage events, find leads, and more. Uncover the practical marketing value of social media channels.

Interested in learning more about Aptean? Please contact us at 1.855.411.2793 or email us at info@aptean.com.

FEATURES	DESCRIPTION	MICROSOFT	SALESFORCE.COM
Configurability	Highly configurable—what is commonly a *customization in other CRM systems is simply a configuration in Pivotal.	Limited configuration ability, customizations are needed for most business process	Basic configuration and limited proprietary customization capability
Exchange Integration	Embedded Outlook functionality, native to system	Integrated, not native to system	Downloaded Outlook plug-in, not native to system
Dashboards	<ul style="list-style-type: none"> • MS SharePoint embedded • Multiple, role-based dashboards • Customizable data visualizations with drill down 	<ul style="list-style-type: none"> • Hard-coded dashboards • SharePoint integration (optional customization) • Limited drill down 	<ul style="list-style-type: none"> • Proprietary solution • Not real-time • Limited drill down
Mobile Connectivity	Full customizable, anywhere, anytime access from mobile device	Online & offline access	Online & limited offline access
Customization Technology	Server Code: <ul style="list-style-type: none"> • Visual workflow (WF) • Full .NET Client Code: <ul style="list-style-type: none"> • Visual workflow (WF) • Full .NET with pre-built controls and event hooks 	Server Code: .NET Client Code: JavaScript	Proprietary: "Apex"
Deployment Options	On-premise, hybrid, or cloud	Cloud or on-premise	Cloud only
Social CRM	Comprehensive, fully integrated SCRMM	Can integrate with Yammer for Enterprise Collaboration.	"Chatter" for internal collaboration. Salesforce

*Customization requires coding, configuration can be done using a toolkit.



About Aptean: Aptean helps businesses profit, innovate and grow where the work gets done—in the call center, on the floor of the factory, at the end of the assembly line. That's where Aptean's CRM, ERP and Supply Chain software applications enable nearly 5,000 customers to satisfy their customers, operate more efficiently and stay at the forefront of their industry.

Aptean is where software WORKS. For more information, visit www.aptean.com.