

Pivotal Mobile Sales™

Empowering the mobile enterprise

With the ability to communicate data, application and platform changes seamlessly across a distributed enterprise, administrators can cost-effectively support mobile employees, and business managers can ensure both mobile users and head office workers enjoy the highest levels of productivity.

Mobile CRM is no longer a luxury for a few high performance employees; it's a critical requirement for any organization that engages in high-value prospect and customer interactivity, anytime, anywhere. Yet until today, the complexity and expense involved in keeping mobile systems updated with head office data and application changes has raised the cost of deploying, administering and supporting a mobile workforce, making many enterprises hesitate when it comes to rolling out a mobile sales solution.

Pivotal Mobile Sales provides the entire mobile work force with full-functionality disconnected access, as well as always connected access to Pivotal CRM, ensuring users can be productive wherever and whenever required.

Pivotal Sales™ Suite

[Pivotal Sales™](#)

[Pivotal Sales – Miller Heiman Edition™](#)

[Pivotal Assisted Selling™](#)

[Pivotal Contact Center™](#)

▶ Pivotal Mobile Sales™

[Pivotal Sales Analytics™](#)

The enhanced Pivotal Sales suite interacts with and complements the Pivotal CRM Suite, which also includes Pivotal Marketing, Pivotal Service, Pivotal Interactive Selling and Pivotal Partner Management Suite.

Complete Mobility

Pivotal delivers a complete mobile CRM solution, ensuring users have full application functionality as well as prospect, customer and product data wherever and whenever required. Pivotal Mobile Sales supports all the organization's mobile users, from mobile executives on the road to remote field sales to sales reps who've just stepped out of the office for the day.

- Salespeople away from the office for days or even weeks at a time have complete access to CRM application functionality, with or without a network, via Pivotal Mobile Client.™
- For users who do not require a complete offline CRM system, Intellisync for Pivotal™ supports bi-directional synchronization of Pivotal PIM data with Microsoft Outlook or Lotus Notes, allowing PDA-based offline access to critical data.
- Pivotal Wireless™ allows mobile users to stay connected – always aware of critical opportunity and account developments. Using the micro-browser on a wireless device such as a web-enabled cell phone or personal digital assistant (PDA), mobile users gain real-time access to the critical data they need from anywhere in the field.

Pivotal Mobile Sales in Action

Anywhere, Anytime Access to Critical Data

Pivotal Mobile Client allows field Sales to take the deal to the customer. A truly mobile office, users can access offline catalogs, create quotes, manage emails and close current business on their laptop while at the client's site, using the same interface and 100% of the functionality employed by users back at head office.

By synchronizing PIM (Personal Information Manager) data, users who don't require a full offline client can choose to take up-to-date calendar, contact and task information to the meeting on their PDA, instead.

Even though mobile users aren't plugged in, it doesn't mean they're out of touch. Out of the box, Pivotal Wireless users have access to live data that allows them to search and edit employee, contact and company information; view, create and edit current activities, opportunities, meetings, calls and tasks (To-Do's); and add notes to contacts, companies, and opportunities. Pivotal Toolkit makes it easy to create custom wireless applications to support other mobile wireless requirements.



Pivotal Wireless for Sales



Pivotal Mobile Client

Full, Offline Access

The Pivotal Mobile Client, a complete, scaled-down Pivotal system designed to run on laptops, provides all the features of an online client to ensure mobile users can gain full offline access to customer records and product data. With full offline access to the Pivotal system, mobile users can work field opportunities from first contact through proposal generation while face to face with the customer, needing only to connect to a network in order to synchronize data and submit the customer's order for fulfillment.

Application Synchronization

The Pivotal Mobile Client automatically synchronizes in the background as soon as the mobile user connects to the corporate network, allowing users to continue being productive on their system even during synchronization. Data changes, application updates, platform upgrades, and Service Packs & Hot Fixes are broadcast to all mobile systems within the same synchronization session, eliminating traditional, resource-intensive, in-office upgrades, and ensuring the mobile organization is working with the same up-to-date data and applications as head office.

Pivotal Mobile Sales – At a Glance

Easy to Administer	
Centralized administration	<p>Centralized, role-based security and permissions simplifies administration:</p> <ul style="list-style-type: none"> • A global view of the entire system, including all mobiles and satellites, allows administrators to maintain, monitor and troubleshoot the distributed enterprise. • Synchronization and view filters can be set to restrict which information mobile clients can access and update. • Support for silent install reduces administration burden

Functionally Complete	
Full Offline Access	<p>All the functionality of an online client, including:</p> <ul style="list-style-type: none"> • Offline read/write access to data • Quote creation • Opportunity management • Product catalogs • Complex product configuration
MS Office Integration	<ul style="list-style-type: none"> • Reference Pivotal prospect and customer data within MS Office 2003 applications, increasing efficiency. • Bi-directional synchronization of email, contact, task and calendar information between Pivotal and Microsoft Outlook, creating a single, enterprise-wide repository of all customer interactions.
Complete Synchronization	
Data Reliability and Integrity	<ul style="list-style-type: none"> • Each synchronization session is verified and confirmed. • Interrupted sessions resulting in lost or truncated messages automatically cause the Pivotal system to re-broadcast missing data before any updates are made, eliminating the possibility of data inconsistency.
PIM Synchronization	<ul style="list-style-type: none"> • Bi-directional synchronization of calendar, contact and task information between Pivotal and Microsoft Office or Lotus Notes.
In-the-field Updates	<ul style="list-style-type: none"> • Synchronizes all data changes, application customization and platform upgrades in a single session. • Code Update feature broadcasts Service Packs and Hot Fixes to mobile users.
High Performance	<ul style="list-style-type: none"> • Highly scalable HTTP-based synchronization. • Optimized algorithm provides fast synchronization, even over low-bandwidth connections. • Complex business rules are applied offline, minimizing connection time.
Wireless Support	
Continuous Access	<ul style="list-style-type: none"> • Real-time read and write access to Pivotal business logic and customer data. • Broadcast alerts and critical information to mobile users. • Supports any wireless device with an HTML or WML micro-browser.
Fully Customizable Wireless Solution	<ul style="list-style-type: none"> • XSL style sheets optimized for a wide array of supported wireless devices, micro-browsers and networks facilitate immediate deployment. • Customization guide simplifies the testing, deployment and support of additional devices and networks so organizations can tailor a solution by geographical area and device preference. • Custom vertical applications can be rapidly tailored using Pivotal Toolkit.™

CRM That Fits Your Business

Pivotal is the only complete CRM platform and application suite that can be tailored to fit the unique requirements of every enterprise. Drive measurable results that matter with CRM that works the way you do.



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