We understand how important a well-informed, knowledgeable employee is to the success of your business. Aptean University is a comprehensive education program designed to help users, of all levels of sophistication, maximize their technology investment.

Aptean is where software works.

LEARNING GOALS

• What is the Pivotal UX client
  – Activity Management
  – Features
  – Action Center

• Demonstration
WHAT IS THE PIVOTAL UX CLIENT

• The Pivotal UX Client is a web-based interface with a modern look and feel
• It’s supported on multiple platforms – tablets, laptops and desktops – by industry standard browsers
• The UX Client is delivered as part of the Pivotal 6.5 release and it takes flexibility and mobility to a new level

WHAT IS THE PIVOTAL UX CLIENT

• The UX Client can be used in conjunction with the Pivotal Smart Client
• Deployment options – on premise or in the cloud
WHAT IS THE PIVOTAL UX CLIENT

- The targeted use will be for mobile access to Pivotal so we’re providing a streamlined version of a Mobile Sales Application with contact management and opportunity management capabilities
- Users will be able to View, Add and Edit Pivotal information; they’ll also be able to run basic and global searches

ACTIVITY MANAGEMENT

- We are providing a server-side solution for activity management. When a user creates an email, meeting or task from the UX Client, a Pivotal form will be displayed. From this form, the user can enter details, add attachments and then link it to a Pivotal record
- The integration with Microsoft Exchange will send the activity and then save it to Pivotal.
FEATURES

- We’ve focused on the most important features for a mobile sales user such as creating emails, appointments and tasks as well as having access to their calendar.
- There is also mapping functionality so the sales user can see where their customer is located and then plot a route.

FEATURES - ACTION CENTER

- Another great feature of Pivotal UX is the Action center – users can create their own dashboard by adding graphs or searches.
DEMONSTRATION

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THANK YOU

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