Pivotal

frevvo

PIVOTAL SOFTWARE CHOOSES FREVVO AS THEIR ONLINE FORMS/WORKFLOW SOLUTION.

- **Pivotal Software wanted to make their internal Finance and HR processes easier and more efficient.**
- **Approvals and signatures for Expense Reports, Purchase Orders, Travel and Professional Development requests were previously handled with email taking hours of time to reconcile and collect.**
- **Pivotal chose to utilize frevvo's ability to integrate their forms/flow with Google Apps. This was a deciding factor when evaluating online solutions.**
- **frevvo's online form builder provides a quick and easy way to create forms/workflows that integrate with a Google sheet and collect approvals/signatures.**

Customer Profile: Pivotal Software offers a proven way to help organizations transform to next generation enterprises. Their unique guidance and powerful platform modernizes business-critical apps to deliver software rapidly and securely to customers.

Business Situation: Pivotal, like many organizations, needs to process Travel, Purchase card, Purchase Orders and Professional Development requests from staff. These processes were slow, inefficient and difficult to manage through email. The Finance team was searching for an easier, faster way to collect approvals and signatures.

Solution Summary: frevvo's powerful online platform provided Pivotal's small Finance team with an easy solution. Integration with Google Sheets allowed them to quickly pull employee information into workflows. Successful deployment of automated Finance processes led to the design of a Purchase Card workflow that pulls cost centers from Google Sheets and conditionally routes the flow to the correct approver.

> "Our Finance team appreciates how easy frevvo's Visual Rule Builder has made incorporating dynamic behavior into our forms/workflows. We have done a lot with frevvo. Our stakeholders are very pleased"
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> **Peter Holland, T&E/ Purchasing Coordinator, Pivotal Labs, Toronto**

frevvo workflows track Employee Professional Development requests and ensure they are charged against the correct budget. Submissions are saved in the frevvo submission repository, a Google sheet or as a PDF in Google Drive. frevvo creates a ticket in a ticketing system for further approval tracking.

Benefits:
- Automatic validations, calculations and business rules reduce errors and corrections.
- Integration with Google Apps allows easy tracking and review.
- frevvo creates tickets in a ticketing system.
- Finance and HR processes route automatically for faster approval with no hassles.

Pivotal Software will continue to digitize future forms/workflow. Integration to an SQL external database is planned.