



PivotEQ | SAP Concur Sales Process

Our goal is to help when you want it – and stay out of the way when you don't!

Pivot Payables is focused on ensuring an efficient sales engagement process with the SAP Concur team members. This datasheet guides you through a sample sales process and outlines tools available to offer, sell, and close PivotEQ deals.

Reach us any time at [Concur Sales @ Pivot](#). Search for "PivotEQ" to find all our resources in your Highspot repository.

Task Description	Sales Resources/Notes	SAP Concur	Customer	Pivot Team
1 Introduce PivotEQ to customer and request engagement.	Email Script: Sample Email Videos: Demo & Success Story	✗		
2 Customer engages and expresses interest.	Website: PivotEQ landing page SAP Concur App Center listing		✗	
3 Submit an App Center lead, then forward the confirmation email to concursales@pivotpayables.com		✗		
4 Attend a PivotEQ Webinar	Register: PivotEQ Webinars Presentation Deck: Slides w/Notes		✗	and ✗
5 Create a PivotEQ Quote to determine subscription and setup fees – be sure to Save to get a link that returns to the form	Select the Quote/Order link from the SAP Concur App Center listing	✗	or ✗	
6 When customer decides to proceed to contract, return to the Quote/Order and complete the form, then click Submit	Save the quote in Step 5 and use the link to return to the partially completed form	✗	or ✗	
7 Receive Quote/Order form, prepare the Pivot contract documents, then post to DocuSign and gather signatures	DocuSign includes copy to SAP Concur rep		✗	and ✗
8 Upon receipt of signed Agreement and Payment Info Request, complete customer setup processes	Welcome email includes copy to SAP Concur rep			✗
9 Activate customer on PivotEQ, and submit DNF to SAP Concur	Activation includes notification to SAP Concur rep		✗	and ✗
10 Collect SAP Concur Reward, and live happily ever after!		✗	and ✗	and ✗