Pivotal Crew

The **Pivotal Crew App** helps Managed Service Providers (MSPs) proactively monitor performance on key metrics for finance, procurement, sales, and service, among others. You can filter the values on the widgets and perform drill-throughs to show the most relevant data. This article gives a walkthrough of the Pivotal Crew App's features and settings.

What's on this page:

Why should I use the Pivotal Crew App?

The Pivotal Crew Proactive Audit Dashboard for ConnectWise PSA is an essential tool that enables users to assess their business setup against critical Pivotal Crew Practices. It helps companies stay on top of their business by proactively identifying issues like the following:

- Unresolved tickets - Prevent prolonged service disruptions by quickly addressing unresolved tickets for over eight hours.
- Vanishing users - Identify member IDs that have been inactive for 90 days and determine potential account or security issues right away.
- Pending expense reports and time sheets - Manage expense reports and time sheets that have not been submitted or approved for more than 30 days to keep financial records accurate.
- Project limbo - Avoid budget overruns and overdue projects by highlighting cases with no budget, overruns, or overdue dates.
- Aging and unsent invoices - Address aging and unsent invoices to ensure timely billing and revenue recognition.
- Unutilized products - Manage inventory efficiently by addressing negative on-hand counts and old, unused products.
- Overlooked income opportunities - Optimize sales by addressing opportunities with past close dates or zero revenue and avoid overlooking potential income streams.

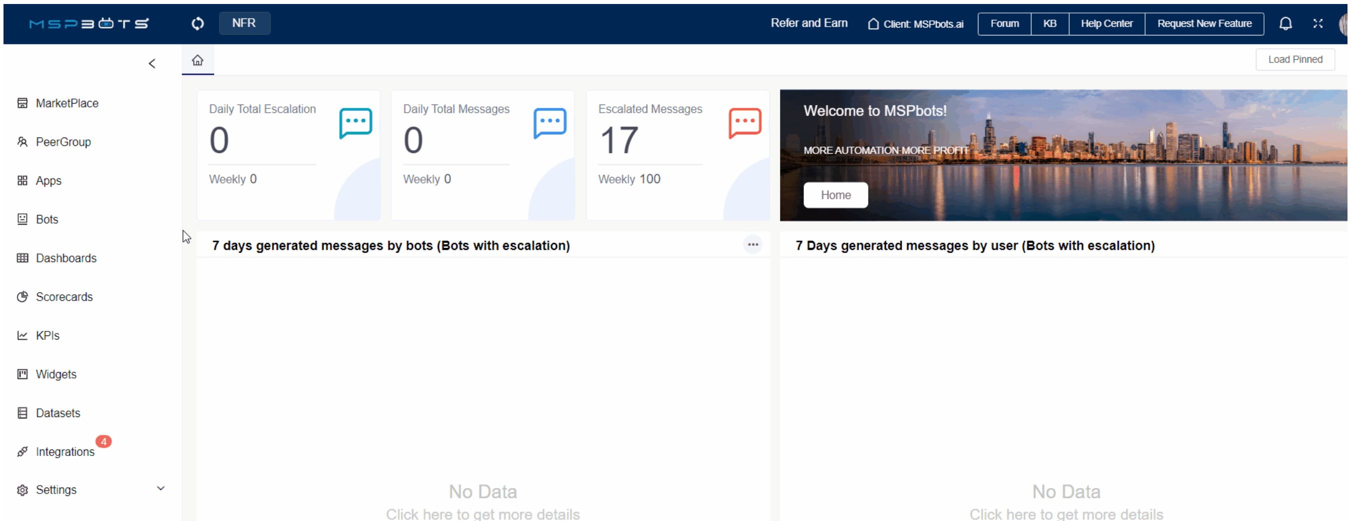
Who can use the Pivotal Crew App?

This dashboard is available to users with the following:

- Pivotal Crew subscription
- ConnectWise Manage integration with MSPbots
- Admin role for editing the dashboard settings
- User role for viewing the dashboard

Accessing the Pivotal Crew App and dashboard

The Pivotable Crew App is accessed from the MSPbots app by navigating to **App** > **Pivotal Crew App**. Its dashboard, the Pivotal Crew Quarterly Proactive Audit App, is currently in the BETA stage and can be accessed from **Dashboards** > **BETA Pivotal Crew - Quarterly Proactive Audit App**.



What data is available in the dashboard?

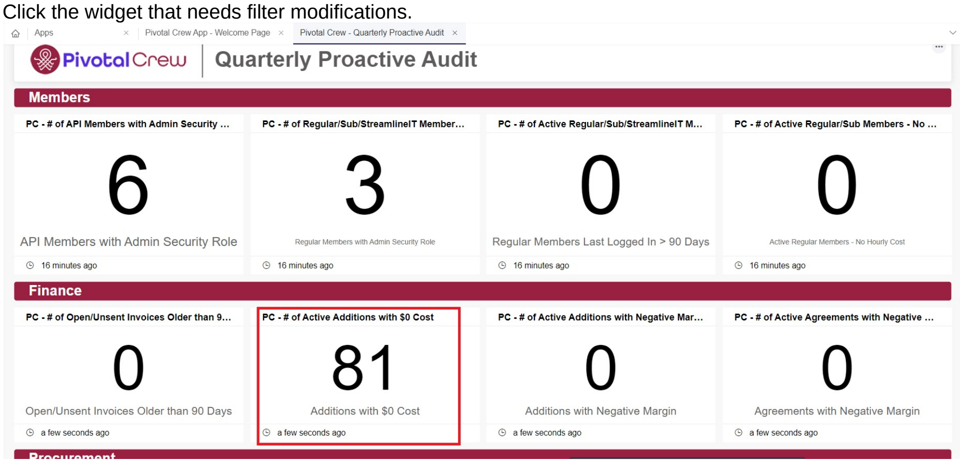
These are the monitored areas of your MSP and the corresponding widgets for each in the dashboard.

Area	Widgets and Metrics	What can I use the data for?	Parameters Used for Calculation
Members	# of API Members with Admin security role	Establish custom security roles for each to ensure proper access control and alignment with best practice	Count
	# of Regular/Sub/StreamlineIT Members with Admin security role	Minimize users with full admins and create custom security roles for members based on what access they need	Count
	# of Active Regular/Sub/StreamlineIT Members that have not logged into CW in more than 90 days	Deactivate inactive users	Count
	# of Active Regular/Sub Members with hire date in last 120 days that are missing hourly cost	Create more accurate profitability reporting based on hourly cost	Count
Finance	# of open/unsent invoices older than 90 days	Minimize potential revenue loss from outstanding/unsent invoices	Count
	# of active additions with $0 cost	Ensure the accuracy of agreement gross profit reporting	Count
	# of active additions with negative margin	Prevent additions with a negative margin resulting in inaccuracies in listed costs or prices, potentially affecting agreement gross profit reporting	Count WHERE (addition_cost - addition_price) < 0
	# of active agreements with negative a margin in the last quarter	Prevent incorrect pricing, unexpected high costs, and other financial discrepancies. It's essential to address and rectify these situations to ensure accurate financial analysis and decision-making	Count WHERE ((agreement_time_cost + agreement_Expense_cost + agreement_product_cost)-agreement_invoiced_revenue)<0)
Procurement	# of Products with Negative On Hand Count	Minimize product setup issues arising from a negative on-hand count	Count
	# of active products in the product catalog that have not been invoiced in more than 1 year	Plan for a product catalog cleanup to inactivate products that have not been used in over a year.	Count
Sales	# of Opportunities with closed date in the past	Initiate cleanup and process review	Count
	# of Opportunities with $0 revenue	Focus on opportunities that have a revenue amount that will impact forecast reporting	Count
	# of open Sales Orders older than 180 days	Initiate cleanup and process review	Count
Service	# of Open Tickets that have not been updated in more than 90 days	Review service processes for improvements	Count
	# of Open Tickets that have more than 8 hours entered	Review escalation processes or identify service requests that could be turned into projects	Count
Project	# of Open Projects with 0 budget hours	Set project budget hours to ensure profitability stays on track	Count
	# of Open Projects that are over budget	Review and adjust the scope of projects exceeding the allocated budget	Count
	# of Open Projects that are past the estimated end date	Review and update the estimated due dates of open projects	Count
Time and Expense	# of Missing Time Sheets older than 30 days	Initiate improvements on the timesheet approval process	Count
	# of Missing Expense Sheets older than 30 days	Initiate improvements on the expense sheet approval process	Count
	# of Submitted/Unapproved Time Sheets older than 30 days	Initiate improvements on the timesheet approval process	Count
	# of Submitted/Unapproved Expense Sheets older than 30 days	Initiate improvements on the expense sheet approval process	Count

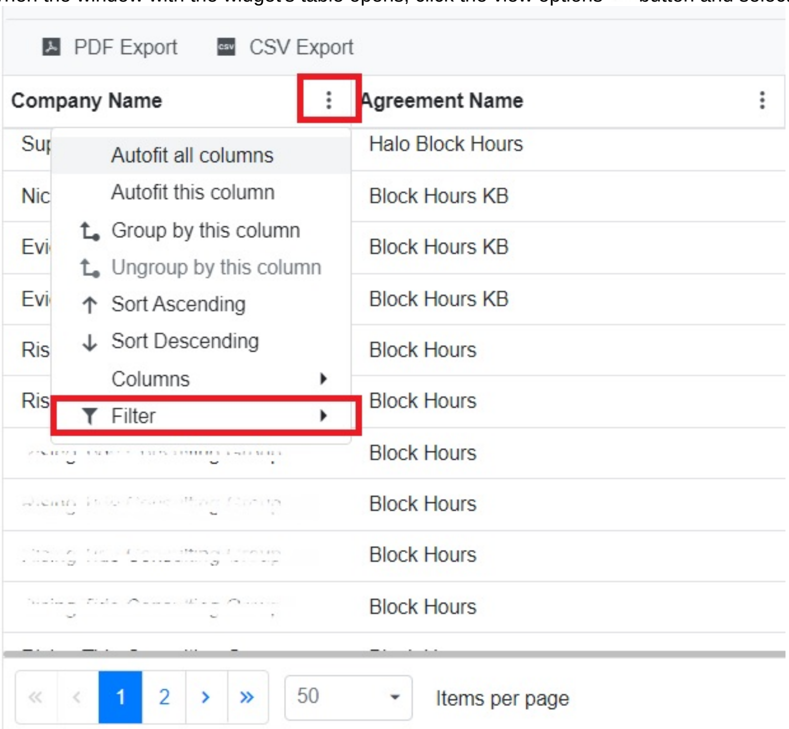
How to apply gauge-level filters

Do the following to filter data on a specific widget only:

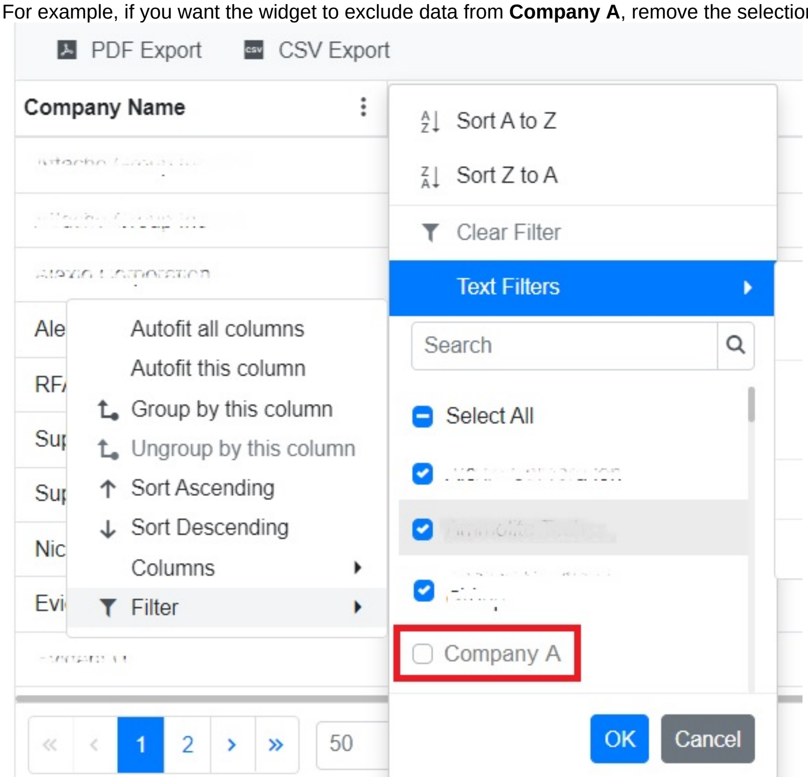
1. Click the widget that needs filter modifications.



2. When the window with the widget's table opens, click the view options button and select **Filter**.



For example, if you want the widget to exclude data from **Company A**, remove the selection for it.



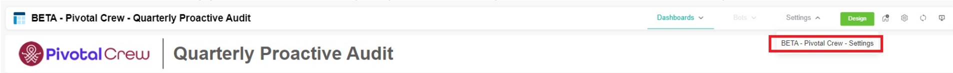
3. Click **OK** and close the widget window.

How to modify the dashboard-level settings

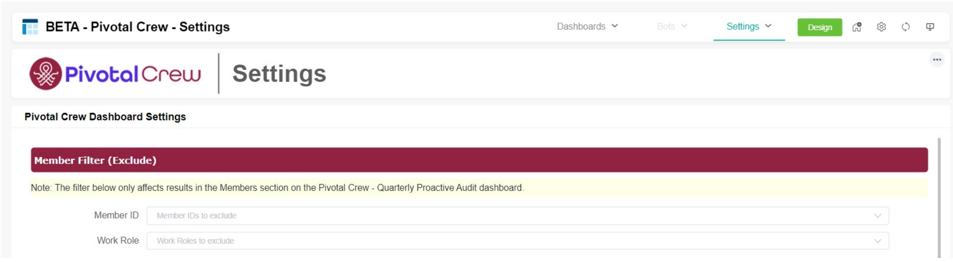
You can edit the dashboard settings to change the data in the Members, Service and Project, and Procurement and Finance sections of the Pivotal Crew - Quarterly Proactive Audit dashboard. Edit the settings with the following steps:

Modifications done on the Pivotal Crew Settings page affect data in all widgets on the dashboard. If you want to modify the settings of a particular widget only, refer to Applying filters to specific widgets.

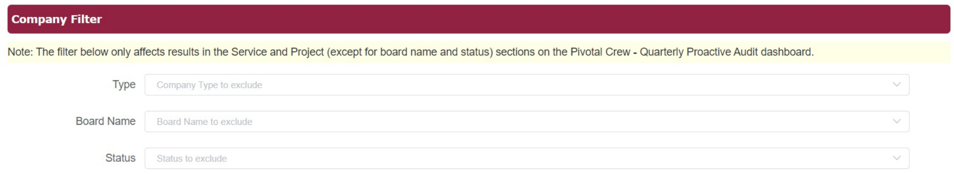
1. On the Pivotal Crew App - Welcome Page, go to **Settings** > **Pivotal Crew Settings**.



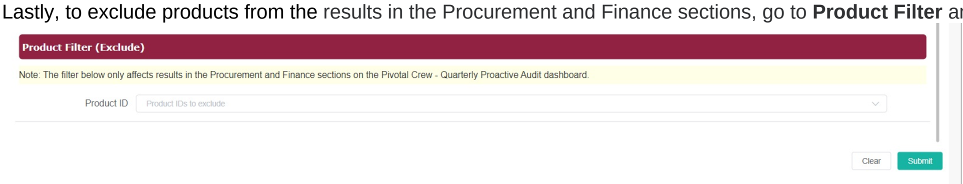
2. To exclude members, go to the **Member Filter** section in the Beta - Pivotal Crew - Settings tab, and select the **Member ID** and **Work Role** that will be excluded from the results in the Members section on the dashboard..



3. To exclude companies from the results in the Service and Project (except for board name and status) sections, go to **Company Filter** and select the **Type**, **Board Name**, and **Status** of the company for exclusion.



4. Lastly, to exclude products from the results in the Procurement and Finance sections, go to **Product Filter** and select the **Product ID**.



5. Click **Submit** to apply the settings.
6. Verify the results in the **Pivotal Crew - Quarterly Proactive Audit** dashboard. Check if the widgets show the desired values.