PivotalLive

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PIVOTAL PAYMENTS
POWERING YOUR SUCCESS

Agenda

- What is PivotalLive?
- Application Phase
- Boarding Phase (Reporting)
- Commission Reporting
- Other PivotalLive Resources

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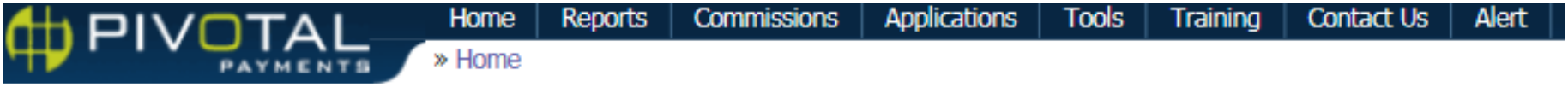
Welcome to PivotalLive,
your online resource for all of your portfolio needs.



- On-Demand Reporting
- Volume, Refund, Chargeback Reports – *Daily, Monthly, Yearly*
- Commission Statements
- Online Application Submission
- Application Pend Management
- Notification Management
- Customer Support Alerting
- Resource Center
- Access to PLC

PivotalLive is a robust reporting platform with enhanced access to other Pivotal platforms such as the Pivotal Learning Center.

There are three key feature sets within PivotalLive:

- Non Boarded Merchants (Application Phase)
- Boarded Merchants (Submitted, Approved, Processing)
- Other (Features, Training, Resources)

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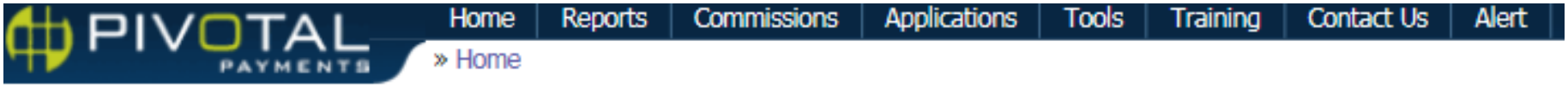
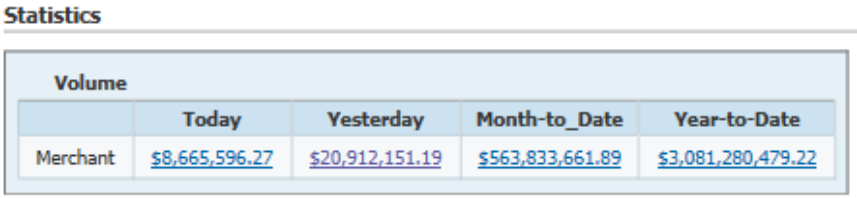
Helpful Tips



- Most reports can be exported into Excel using the option on the right hand side of the screen.
- Recent news is posted in the alert section on the far right hand side of the screen.
- Data can be reviewed as a primary agent or parsed out by sub-agents.

PivotalLive uses technology like hyperlinks to move in between layers of data.

Anything in blue text with an underline is a link to a deeper layer of data. Click through the links to review data in more detail.



Statistics

Volume

	Today	Yesterday	Month-to_Date	Year-to-Date
Merchant	$8,665,596.27	$20,912,151.19	$563,833,661.89	$3,081,280,479.22

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Menu Bar

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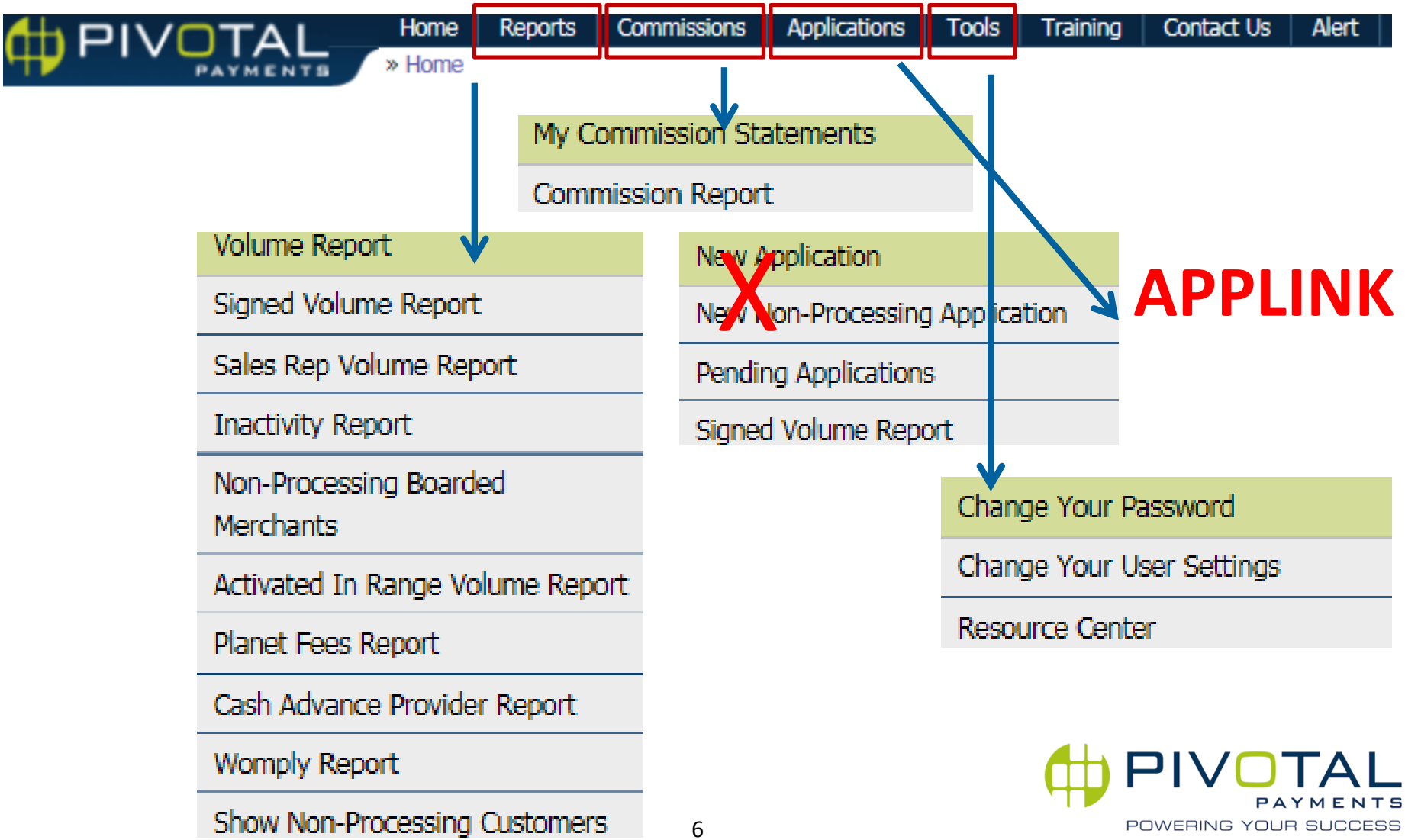
Navigating the PivotalLive Menu Bar



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Home Page

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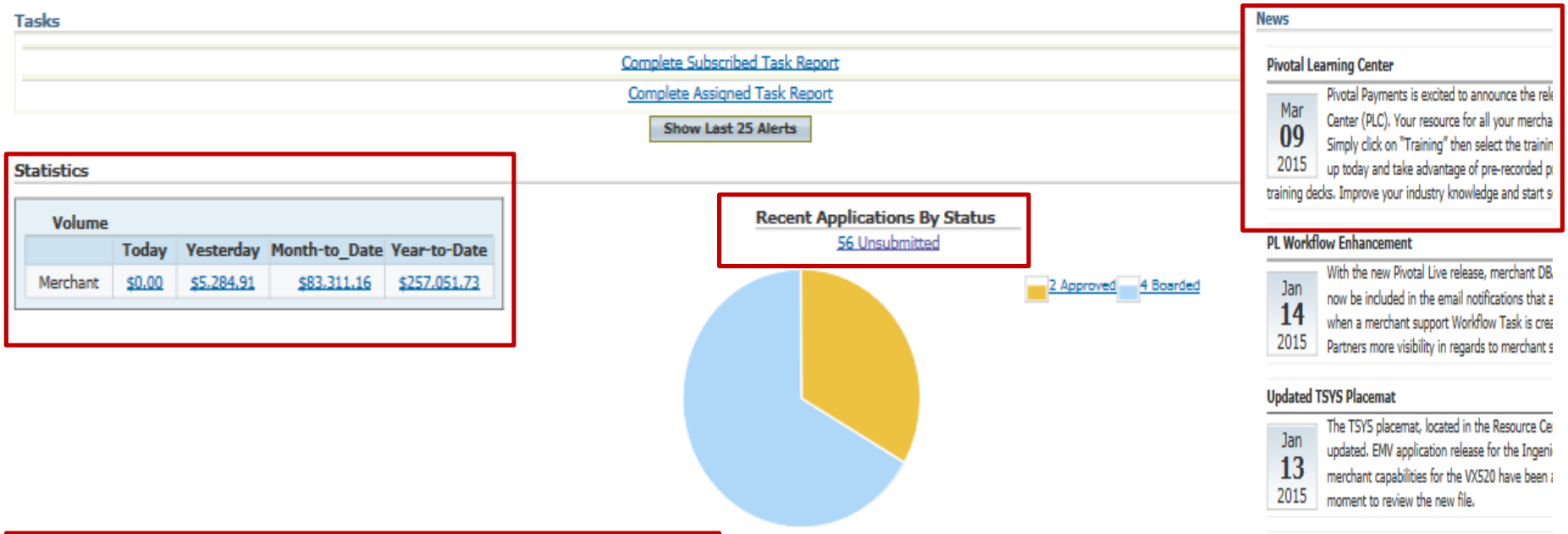

PivotalLive Home Page

Here you will find your key portfolio statistics at a quick glance. You can monitor volume, review current month application statuses and see recent Pivotal news as well.

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Application Phase

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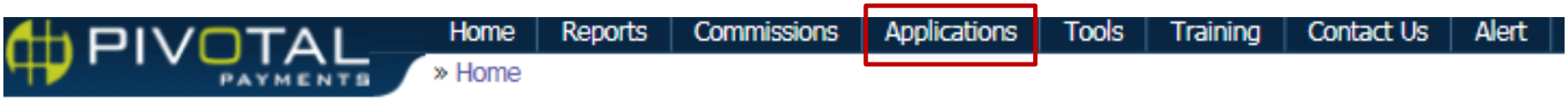


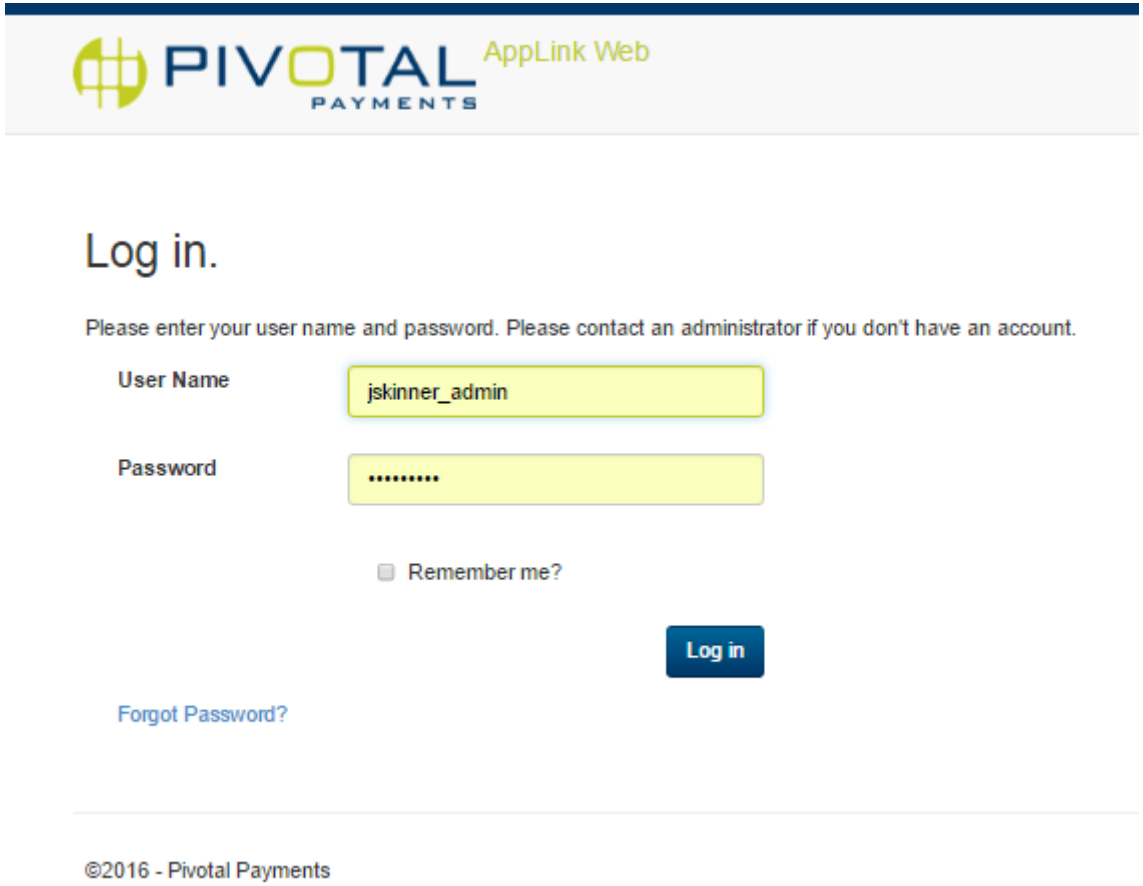
Pivotal's WebApp has transitioned from residing in PivotalLive to a web platform called **Applink**.

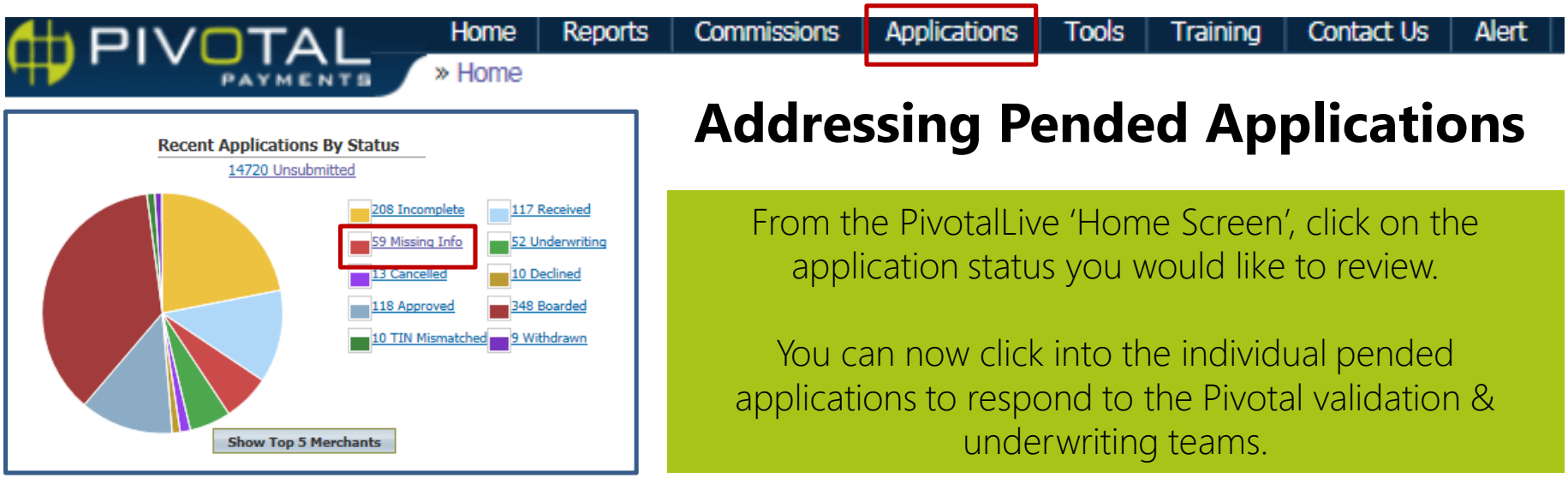
A separate login is required for access to this system.

Contact Partner Services for additional information or to request a user login.

Do NOT use the PivotalLive Applications tab to begin a new application.

AppLink Login CLICK HERE

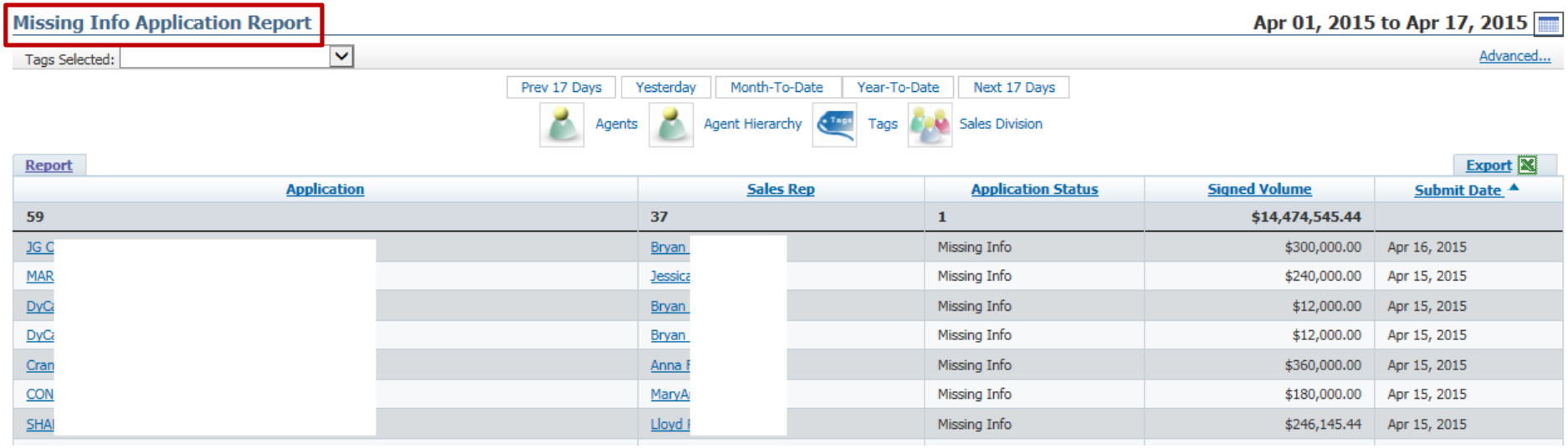




Addressing Pended Applications

From the PivotalLive 'Home Screen', click on the application status you would like to review.

You can now click into the individual pended applications to respond to the Pivotal validation & underwriting teams.



Application	Sales Rep	Application Status	Signed Volume	Submit Date
59	37	1	$14,474,545.44	
JG C	Bryan	Missing Info	$300,000.00	Apr 16, 2015
MAR	Jessica	Missing Info	$240,000.00	Apr 15, 2015
DyC	Bryan	Missing Info	$12,000.00	Apr 15, 2015
DyC	Bryan	Missing Info	$12,000.00	Apr 15, 2015
Cran	Anna	Missing Info	$360,000.00	Apr 15, 2015
CON	MaryA	Missing Info	$180,000.00	Apr 15, 2015
SHA	Lloyd	Missing Info	$246,145.44	Apr 15, 2015

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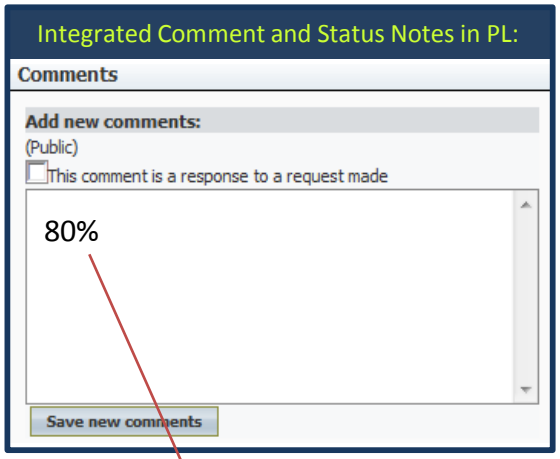
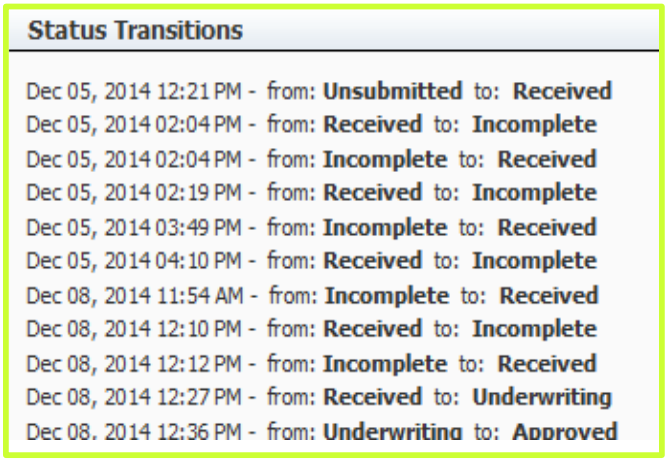
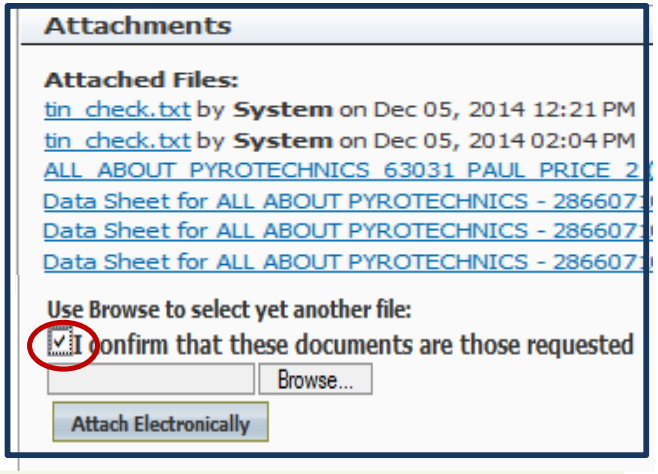
Pends - Application History Screen

WATCH '[Responding to Pended Applications](#)' Now







08/12/14 12:10 **System :** Credit Pull was disabled.

08/12/14 12:10 **validate4 :** [TASK Validate Application CLOSED] - Hello,

In order to complete this application and move it forward to underwriting, please address the concern(s) below:

1) Clarify Stevens percentage of ownership

Thank you

08/12/14 12:12 **opronina :** 80%

08/12/14 12:12 **opronina :** [TASK Provide Additional Info for Validation CLOSED] - The requested documents were acknowledged by opronina on Pivotal Live with the following comment: 80%

08/12/14 12:27 **System :** Credit Pull was disabled.

08/12/14 12:27 **validate4 :** [TASK Validate Application CLOSED] - resolved

08/12/14 12:27 **System :** Match Check Passed

08/12/14 12:27 **System :** Targus Check Failed: 12--Name and Phone DO NOT go together, TARGUSinfo has different Consumer Name

Pended application alerts to Sales Partners are emailed & include detailed request information. The same information will show in the note section of PL.

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Equipment Deployment Tracking - Merchant

Welcome Kits and/or equipment ordered through Pivotal Payments will generate an email to the merchant upon fulfillment which provides:

- Order Number
- Serial Number
- Terminal ID (TID)
- Tracking information

Equipment is shipped via UPS and tracking numbers will begin 1Z….

Thank you for your order,

ORDER DATE: 4/4/2017
DBA: CPMO WAB CUP Test
MID: 6314170000077056

SHIPPED TO:
CPMO WAB CUP Test
123 Fake St
BEVERLY HILLS CA 90210
US

==========

TID	Model	Serial Number
75856958	ICT220	741258963

==========

Your UPS tracking number: 147852369

Please allow 24-48 hours for tracking numbers to become active.
For your convenience, you can track your order by clicking the links below:
www.ups.com

Thank you for your order!

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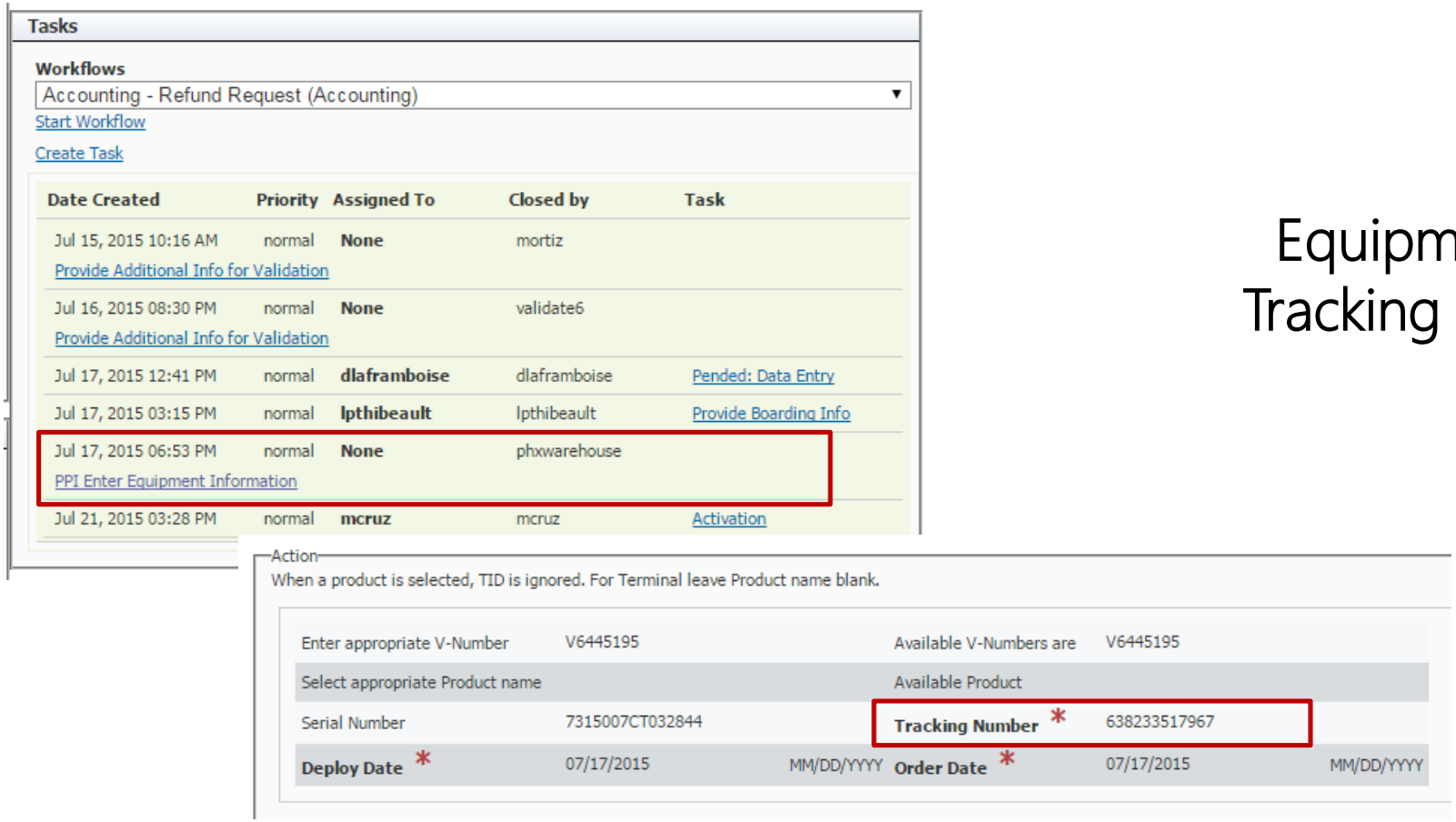
Equipment Deployment Tracking - Partner



Equipment Tracking in PL

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Reports (Boarded)

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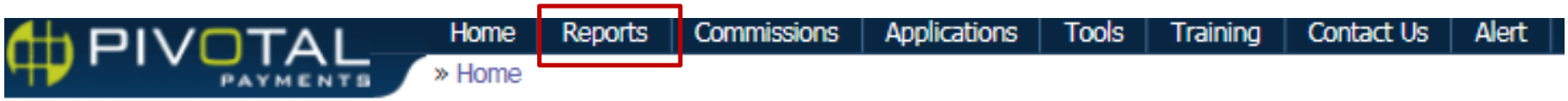

Volume, Refunds & Chargeback Report

Jason **Volume Report** Mar 01, 2015 to Mar 11, 2015

Tags Selected: Advanced...

Prev 11 Days | Yesterday | Month-To-Date | Year-To-Date | Next 11 Days

Agents | Agent Hierarchy | Tags | Sales Division

Volume | Refunds | Chargebacks

Export

Merchant	Details	MID	Pivotal ID	Sales Rep	CB Num	CB Vol	CB %	CB Vol %
14 Merchants				3	0	$0.00	0.0%	0.0%
EMERALD CITY S	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
EMERALD CITY S	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
EMERALD CITY S	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
TINAS HAIR SALO	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
BLUE SAUCER - 2	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
MD NAILS - 2866	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
REMOTE CONTRO	Details	2866	427	Stever	0	$0.00	0.0%	0.0%
PA ANTIQUE MAL	Details	2866	427	Stever	0	$0.00	0.0%	0.0%
HAIR SENSATION	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
ROSE HAIR SALO	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
LOS MOLLETES -	Details	2866	427	Jason	0	$0.00	0.0%	0.0%
THE PERFECT SE	Details	2866	427	Stever	0	$0.00	0.0%	0.0%
STINKY DOG U-B	Details	2866	427	Stever	0	$0.00	0.0%	0.0%

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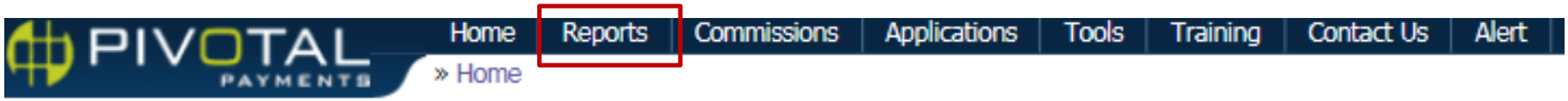

Non Processing & Inactivity Report

Non Processing Merchants

Tags Selected:

Advanced...

Agents | Agent Hierarchy | Tags | Sales Division

Report

Export

Merchant	MID	Pivotal ID	Sales Rep	Boarded Date
MARINE DR MARKET - 286	2866	427	Sean	Mar 09, 2015

Inactivity Report

Tags Selected:

Advanced...

Agents | Agent Hierarchy | Tags | Sales Division

Report

Export

Merchant	MID	Pivotal ID	Sales Rep	Previous Vol	Average Vol	Inactive Since	Inactive For (Days)
20,069 Merchants			**1,234**	**$331,048,635.71**	**$32,874,726.59**		**0**
Rooterman Clifton - 2866	28660	4275	Stacey	$25,919.85	$124.01	Apr 16, 2015	1
MARC J GROSS DDS - 2866	28660	4275	Finical	$29,432.86	$453.72	Apr 16, 2015	1
Concepcion Berlin - 2866	28660	4275	Romulo	$20.19	$212.78	Apr 16, 2015	1
HUNG M NGUYEN DDS PC - 2866	28660	4275	Woody	$7,509.38	$256.73	Apr 16, 2015	1
PERSNICKETY STITCHERS INC - 2866	28660	4275	James	$4,847.17	$160.10	Apr 16, 2015	1
J&J MACHINERY INC - 2866	28660	4275	Ashlee	$9,069.33	$306.64	Apr 16, 2015	1
EAST SKY - 2866	28660	4275	Vasiliy	$1,950.44	$156.55	Apr 16, 2015	1
LEA'S SURVIVAL GYM - 63141	63141	4275	Gary A	$1,714.77	$72.10	Apr 16, 2015	1

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Merchant Profile

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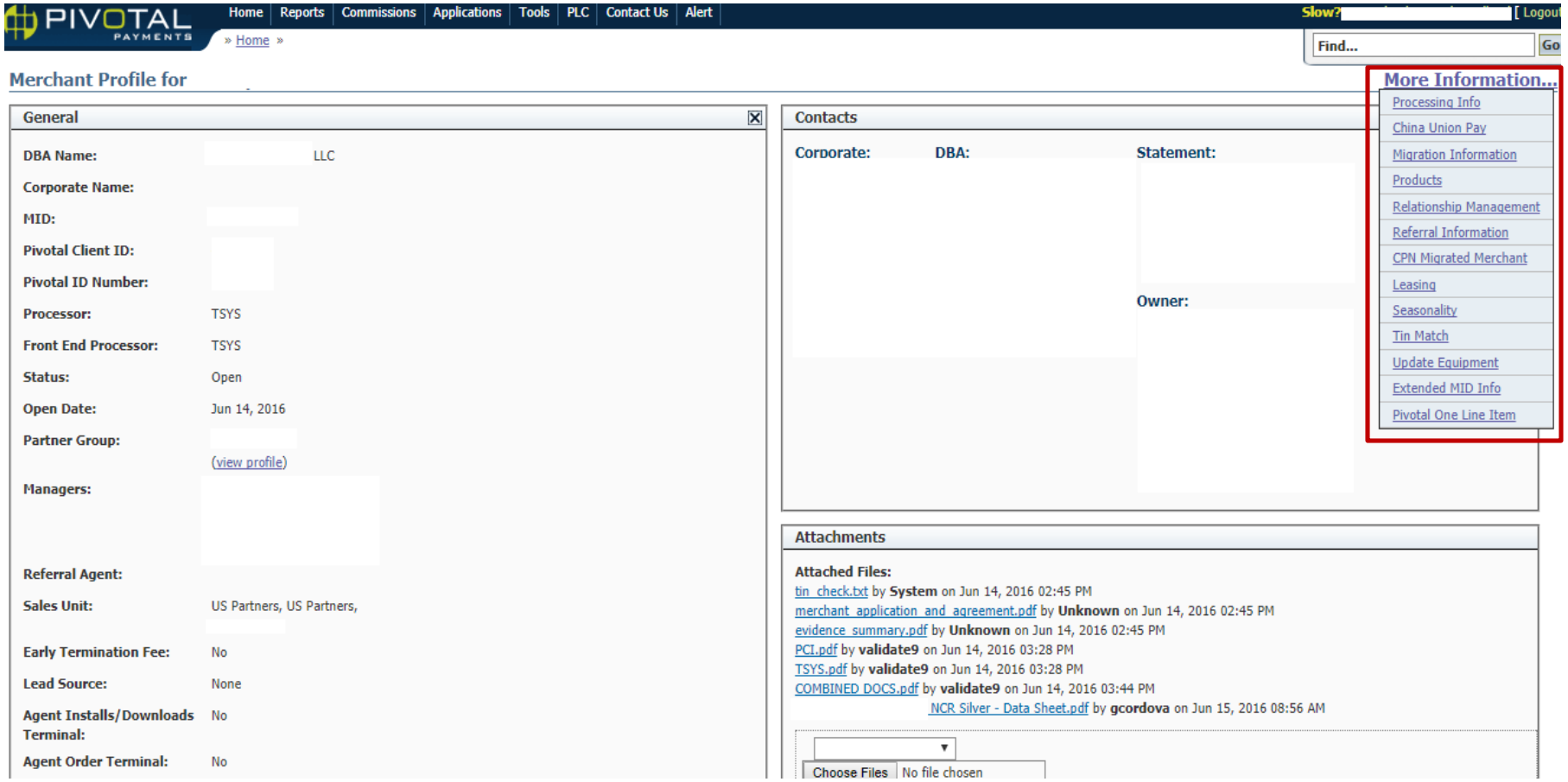
Merchant Profile

Clicking into a merchant profile will provide detailed merchant information. Add additional information sections to the merchant profile under ‘More Information.’



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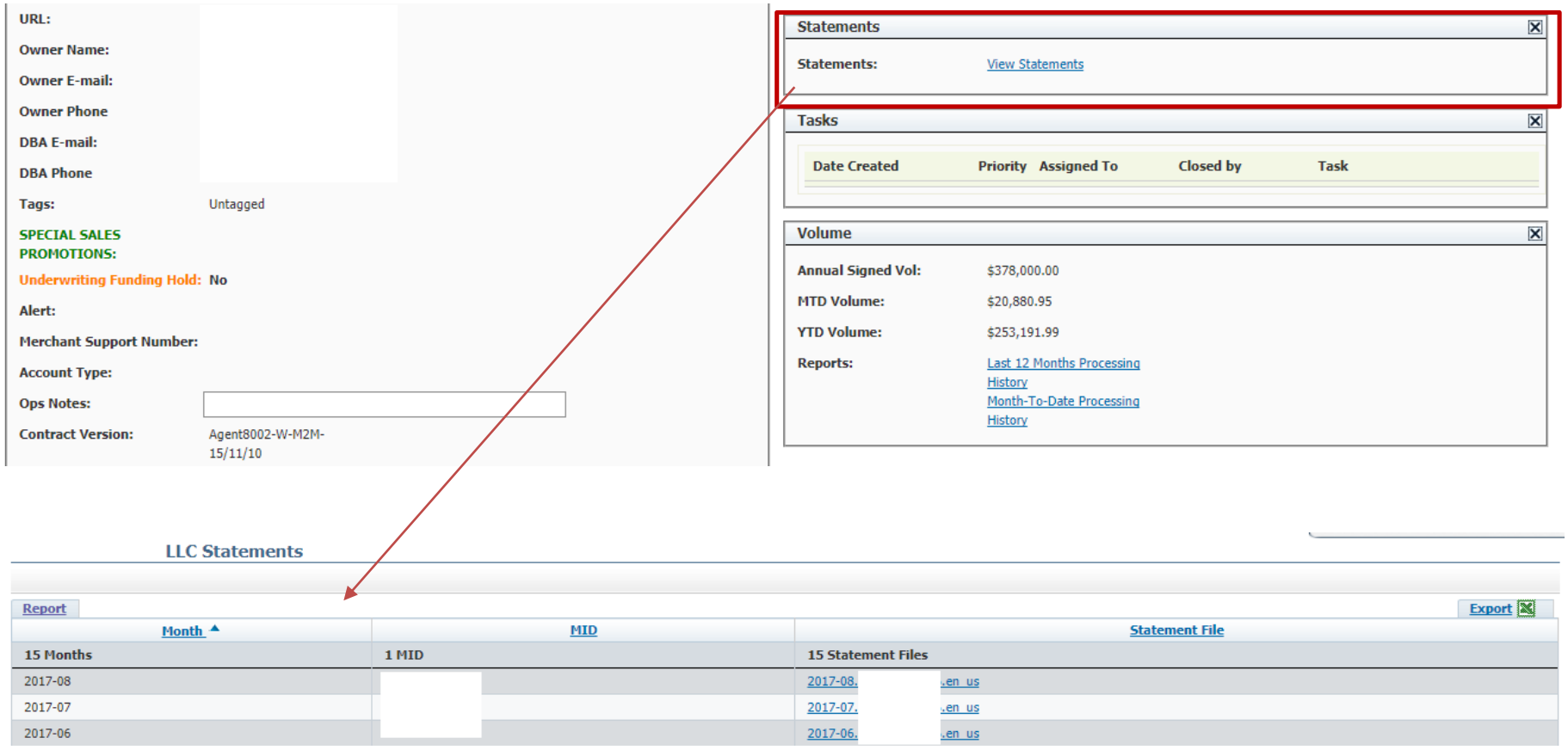
Merchant Profile

To view or download a merchant statement, click on ‘View Statements.’



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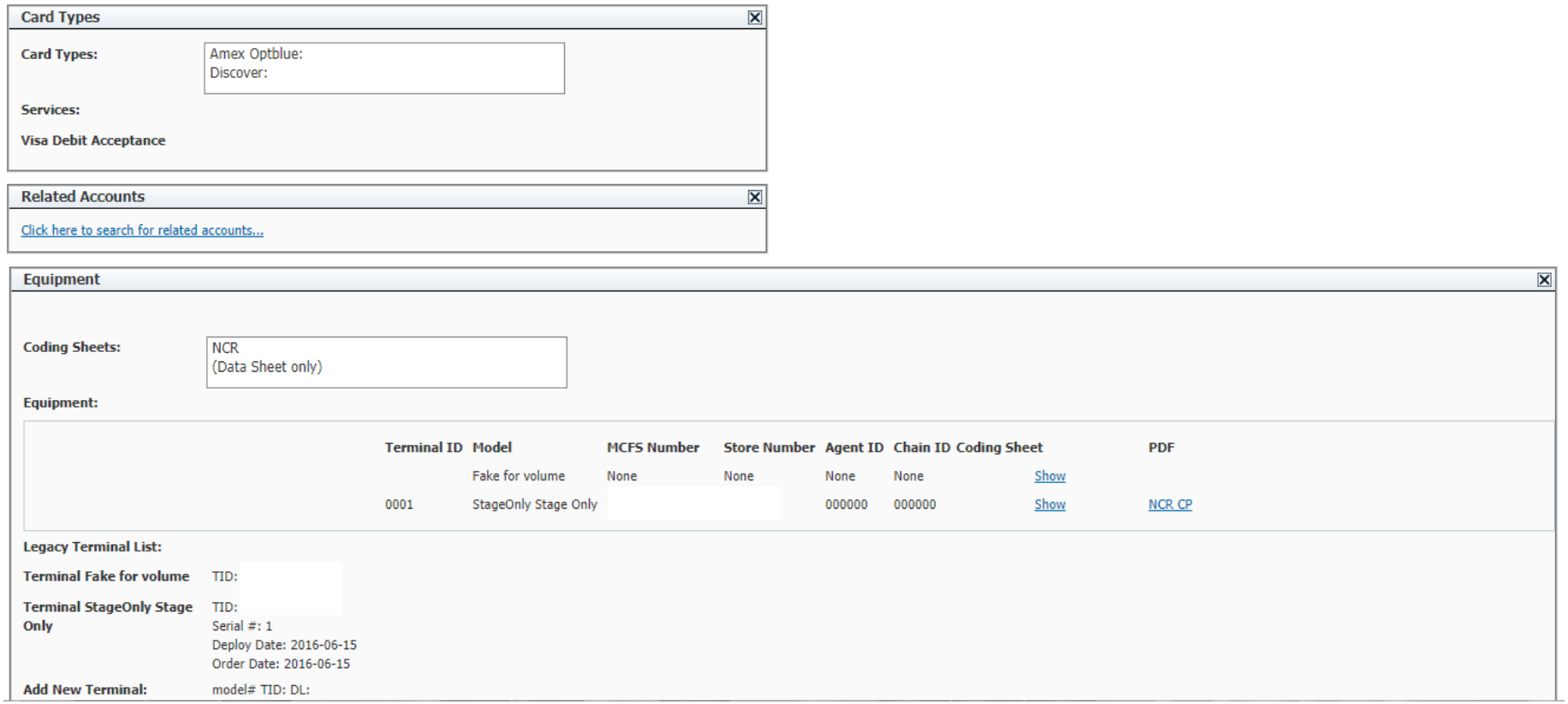
Merchant Profile

To view or download merchant coding/VAR sheets, click ‘Equipment.’



Card Types

Card Types: Amex Optblue:
Discover:

Services:

Visa Debit Acceptance

Related Accounts

Click here to search for related accounts...

Equipment

Coding Sheets: NCR
(Data Sheet only)

Equipment:

Terminal ID	Model	MCFS Number	Store Number	Agent ID	Chain ID	Coding Sheet	PDF
	Fake for volume	None	None	None	None	Show	
0001	StageOnly Stage Only			000000	000000	Show	NCR CP

Legacy Terminal List:

Terminal Fake for volume TID:

Terminal StageOnly Stage Only TID:
Serial #: 1
Deploy Date: 2016-06-15
Order Date: 2016-06-15

Add New Terminal: model# TID: DL:

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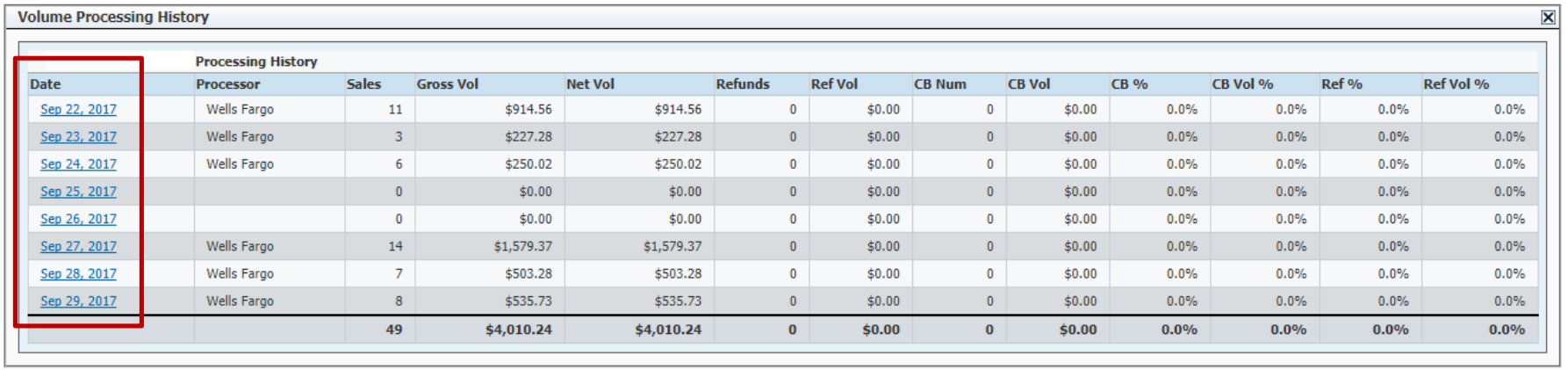
Merchant Profile

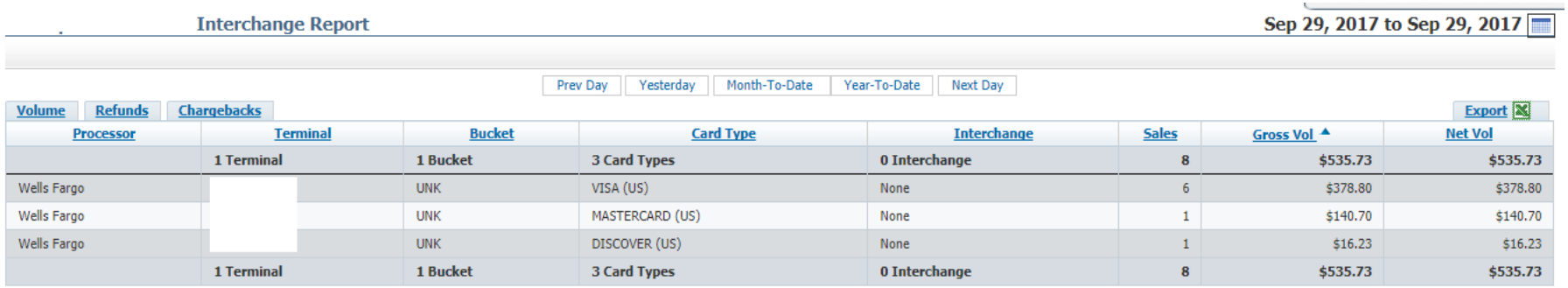
Recent merchant processing activity can be located at the bottom of the merhcant profile in PL. To view additional details about the days transactions, click on the date.



Volume Processing History

Processing History

Date	Processor	Sales	Gross Vol	Net Vol	Refunds	Ref Vol	CB Num	CB Vol	CB %	CB Vol %	Ref %	Ref Vol %
Sep 22, 2017	Wells Fargo	11	$914.56	$914.56	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 23, 2017	Wells Fargo	3	$227.28	$227.28	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 24, 2017	Wells Fargo	6	$250.02	$250.02	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 25, 2017		0	$0.00	$0.00	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 26, 2017		0	$0.00	$0.00	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 27, 2017	Wells Fargo	14	$1,579.37	$1,579.37	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 28, 2017	Wells Fargo	7	$503.28	$503.28	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
Sep 29, 2017	Wells Fargo	8	$535.73	$535.73	0	$0.00	0	$0.00	0.0%	0.0%	0.0%	0.0%
		49	**$4,010.24**	**$4,010.24**	**0**	**$0.00**	**0**	**$0.00**	**0.0%**	**0.0%**	**0.0%**	**0.0%**



Interchange Report

Sep 29, 2017 to Sep 29, 2017

Prev Day | Yesterday | Month-To-Date | Year-To-Date | Next Day

Volume | Refunds | Chargebacks

Export

Processor	Terminal	Bucket	Card Type	Interchange	Sales	Gross Vol	Net Vol
	1 Terminal	**1 Bucket**	**3 Card Types**	**0 Interchange**	**8**	**$535.73**	**$535.73**
Wells Fargo		UNK	VISA (US)	None	6	$378.80	$378.80
Wells Fargo		UNK	MASTERCARD (US)	None	1	$140.70	$140.70
Wells Fargo		UNK	DISCOVER (US)	None	1	$16.23	$16.23
	1 Terminal	**1 Bucket**	**3 Card Types**	**0 Interchange**	**8**	**$535.73**	**$535.73**

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Notifications

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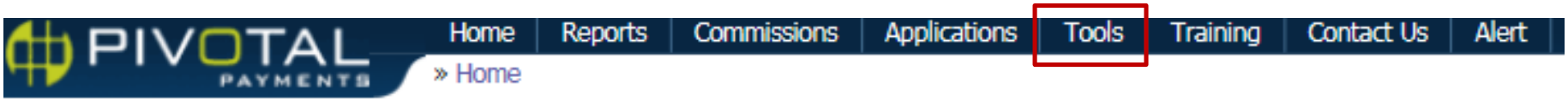
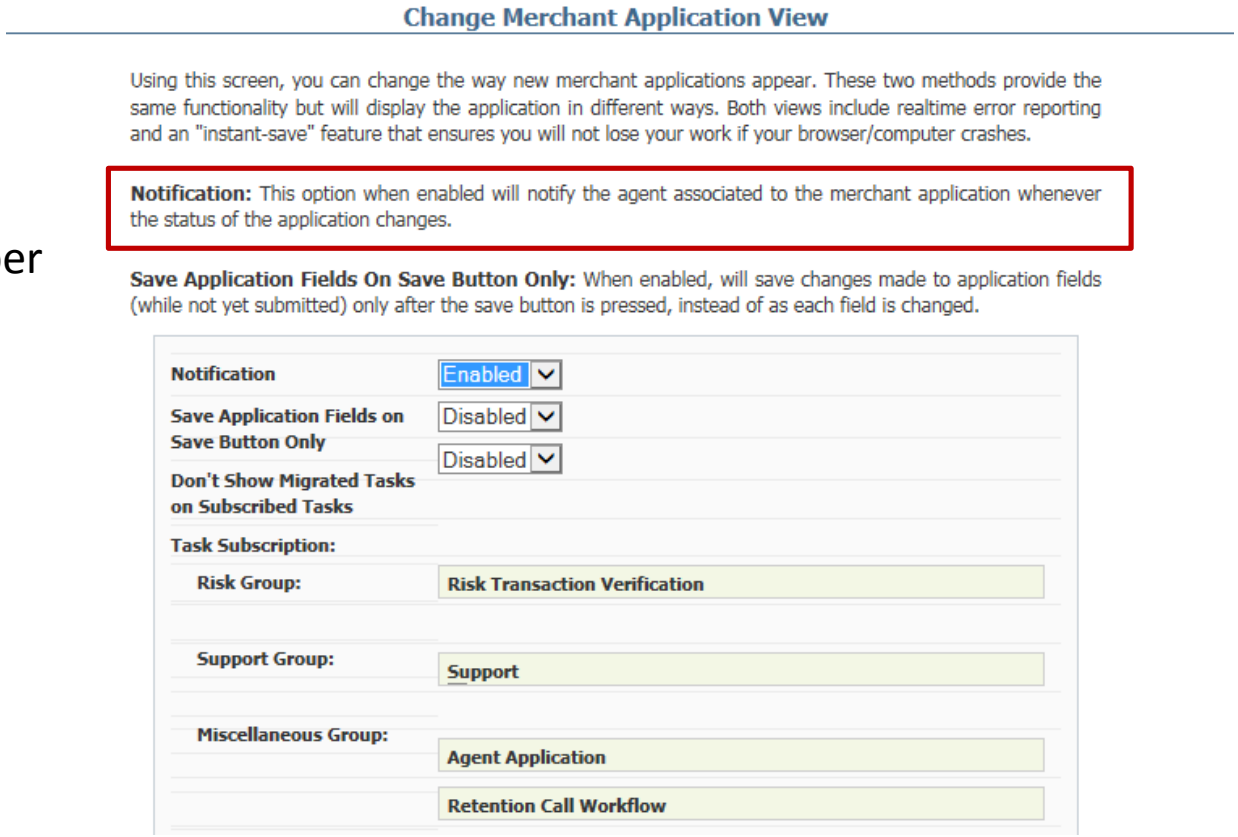


PivotalLive Notification Management

Sales Partners may setup individual customizable reports based on a number of different tasks.



Commission Statements

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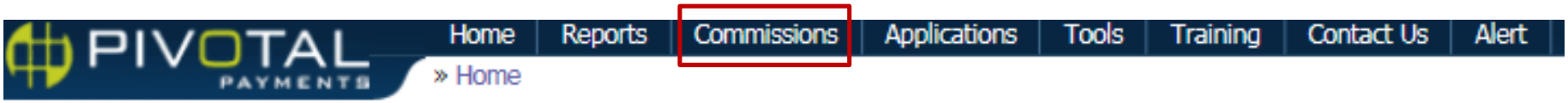
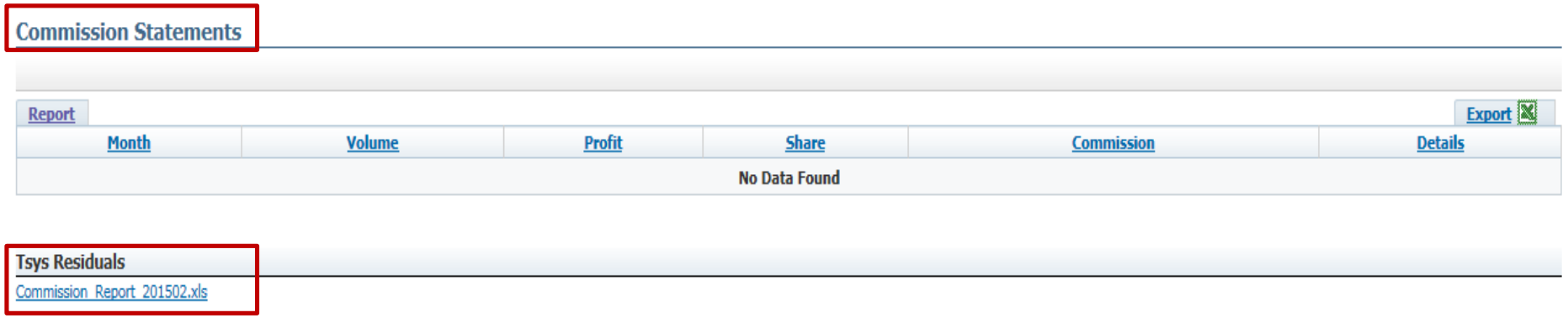
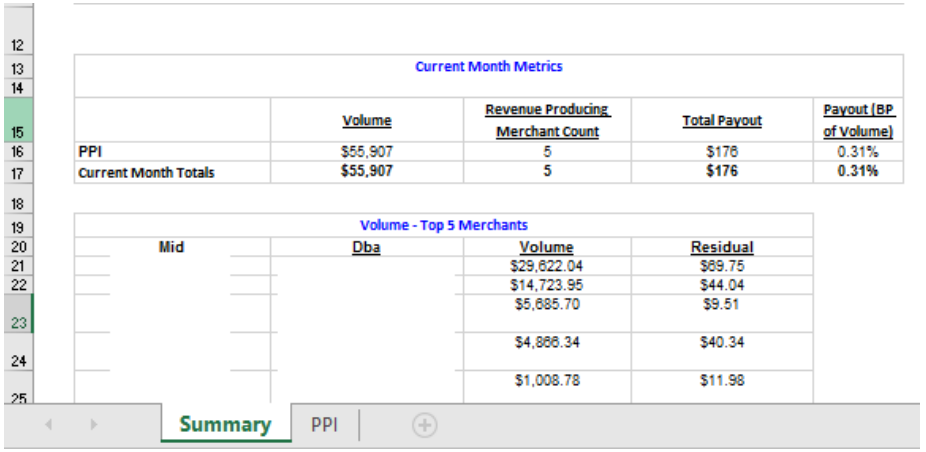


Commissions & Residual Reporting



Sales Partner commission reports are posted in PivotalLive under the 'Commissions' tab.

Past reports will be available for download in an Excel format. Each report contains two tabs, a summary tab and a merchant detail tab.



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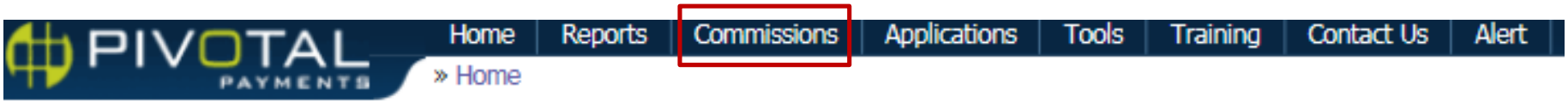
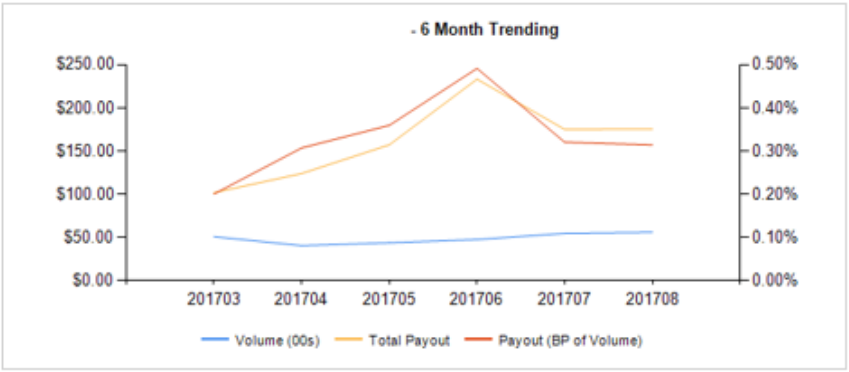


Commissions & Residual Reporting – Tab 1

The summary tab includes previous 6 months total metrics & trends, current month metrics, top 5 merchants by volume, residual, volume increase, residual increase, volume decrease, and residual decrease.

Previous 6 Months Total Metrics

	Volume (00s)	Revenue Producing Merchant Count	Total Payout	Payout (BP of Volume)
March-17	$51	5	$102	0.20%
April-17	$40	5	$124	0.31%
May-17	$44	5	$157	0.36%
June-17	$47	5	$233	0.49%
July-17	$55	5	$175	0.32%
August-17	$56	5	$176	0.31%



Current Month Metrics

	Volume	Revenue Producing Merchant Count	Total Payout	Payout (BP of Volume)
PPI	$55,907	5	$176	0.31%
Current Month Totals	**$55,907**	**5**	**$176**	**0.31%**

Volume - Top 5 Merchants

Mid	Dba	Volume	Residual
		$29,622.04	$69.75

Residual - Top 5 Merchants

Mid	Dba	Volume	Residual
		$29,622.04	$69.75

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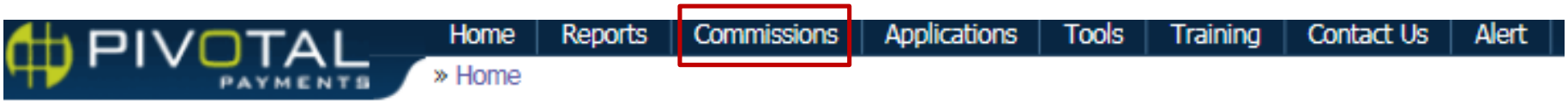

Commissions & Residual Reporting – Tab 2

The detail tab includes a break down of merchant detail for the month including sales volume & transaction counts by card type, expense and income category breakdowns (authorization, batch fees, discount etc.) Each merchant will be totaled for residual value and additional data is shown for any applicable bonuses & equipment charges or revenue.

MID	DBA Name	Agent NAME	Sub Agent	Open Date	Close Date	Agent Share	V/MC/Discover Vol	V/MC/Discover Cnt	AMEX Vol	AMEX Cnt
9122				2017-02-10	2017-04-30	0.85	$0.00	0	$0.00	0
9122				2016-12-07		0.85	$5,575.82	75	$109.88	1
9122				2016-06-16		0.85	$4,057.16	67	$809.18	12
9122				2016-06-14		0.85	$28,149.99	269	$1,472.05	10
9122				2016-12-06		0.70	$27.19	1	$0.00	0
9122				2017-04-26		0.85	$13,882.88	459	$841.07	20
Total							**$51,693.04**	**871**	**$3,232.18**	**43**

Other Income	Other Expense	Agent Other Residuals	Total Income	Total Expense	Total Profit	Total Residuals	Merchant Profit Bonus	Terminal Charge	Misc adjustments	Volume Added Bonus	Merchant related Bonuses	Agent Gross	Sub Agent Payout	Agent Net	has Rejects	bonus comment
$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	0	
$15.75	$12.95	$2.80	$118.78	$108.09	$10.69	$9.51	$0.00	$0.00	$0.00	$0.00	$0.00	$9.51	$0.00	$9.51	0	
$35.74	$32.94	$2.80	$177.35	$130.39	$46.96	$40.34	$0.00	$0.00	$0.00	$0.00	$0.00	$40.34	$0.00	$40.34	0	
$15.75	$12.95	$2.80	$515.02	$433.46	$81.56	$69.75	$0.00	$0.00	$0.00	$0.00	$0.00	$69.75	$0.00	$69.75	0	
$35.74	$32.94	$2.80	$74.41	$58.50	$15.91	$11.98	$0.00	$0.00	$0.00	$0.00	$0.00	$11.98	$0.00	$11.98	0	
$35.74	$32.94	$2.80	$416.23	$364.91	$51.32	$44.04	$0.00	$0.00	$0.00	$0.00	$0.00	$44.04	$0.00	$44.04	0	
$138.72	**$124.72**	**$14.00**	**$1,301.79**	**$1,095.35**	**$206.44**	**$175.61**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$175.61**	**$0.00**	**$175.61**	**0**	

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Other

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Training

Training: Training

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Just click the "Join A Meeting" link on the left hand toolbar of the Go To Meeting web site and enter the above code. **Note, please provide for the possibility of a 10 minute install if this is your first time using Go To Meeting.** If you have any questions regarding Go To Meeting, please contact your Relationship Manager for support prior to the training session.

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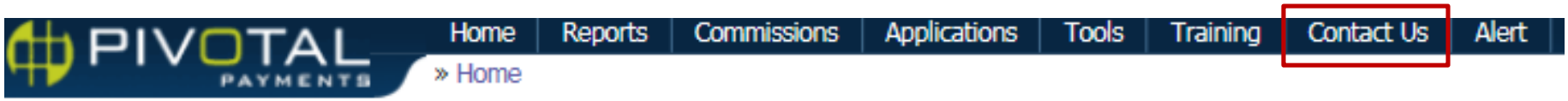

Email: PartnerRM@pivotalpayments.com

Partner Services

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Merchant Banking Change - ACH Group

Email: ach@pivotalpayments.com

Fax: 866-607-4868

TSYS Support Numbers

Tech Support	1-877-772-3346
Customer Support	1-877-772-3346
Chargebacks	1-866-637-5467
Voice Auth MC/Visa/Discover(Requires last 12 #'s of MID)	1-800-291-4840
Voice Auth American Express	1-800-528-2121
Voice Auth Diners	1-800-525-7376
Voice Auth JCB	1-800-366-4522
Hypercom SPOS T&P and T7 Plus	800-847-2355
Hypercom RR, T7 Series	800-426-8472 or 877-631-2757
Hypercom SPOS32 T42XX	866-299-9867
Nurit	866-856-3049
Verifone SEVA321 and UEVA321	888-654-1696 or 800-847-2377
For Vericenter DL's	877-642-2567
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