








# PivotalLive

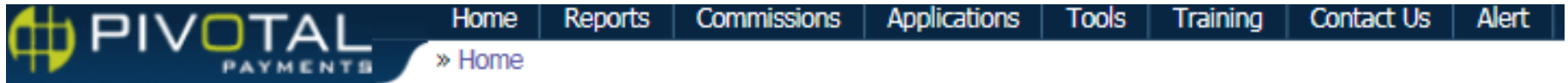
**Jessica Skinner**  
Corporate Sales Trainer, U.S.



# Agenda

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

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



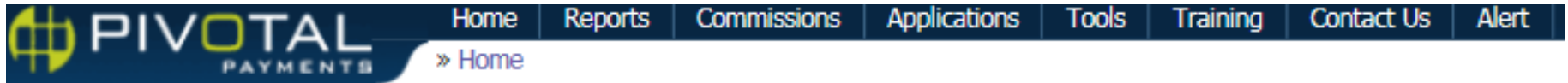
- On-Demand Reporting
- Volume, Refund, Chargeback Reports – *Daily, Monthly, Yearly*
- Commission Statements
- Online Application Submission
- Application Pend Management
- Notification Management
- Customer Support Alerting
- Resource Center
- Access to PLC

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)

## 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.

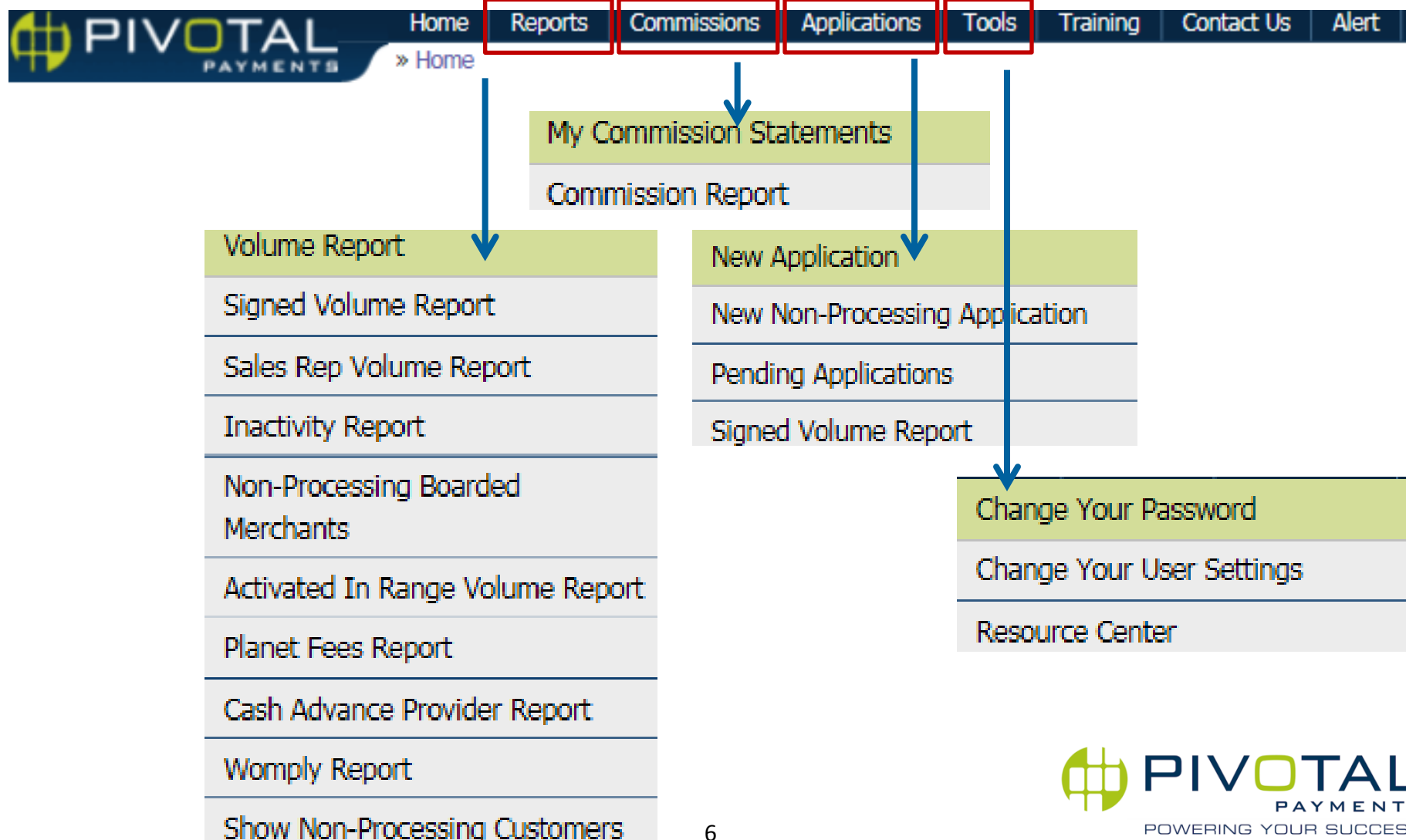
Anything in [blue text with an underline](#) is a link to a deeper layer of data. Click through the links to review data in more detail.

### Statistics

Volume				
	Today	Yesterday	Month-to_Date	Year-to-Date
Merchant	<a href="#">\$8,665,596.27</a>	<a href="#">\$20,912,151.19</a>	<a href="#">\$563,833,661.89</a>	<a href="#">\$3,081,280,479.22</a>

# Menu Bar

## Navigating the PivotalLive Menu Bar





# Home Page

Tasks

[Complete Subscribed Task Report](#)

[Complete Assigned Task Report](#)

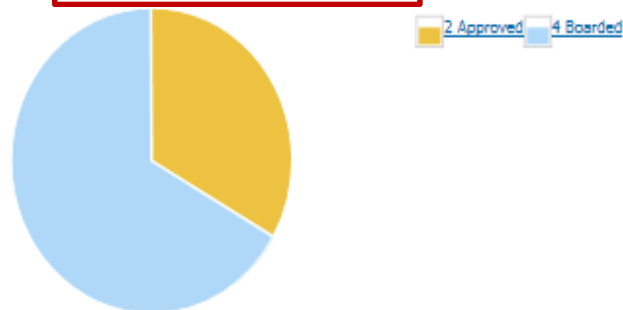
Show Last 25 Alerts

Statistics

Volume				
	Today	Yesterday	Month-to_Date	Year-to-Date
Merchant	\$0.00	\$5,284.91	\$83,311.16	\$257,051.73

Recent Applications By Status

56 Unsubmitted



News

Pivotal Learning Center

Mar 09 2015 Pivotal Payments is excited to announce the re-launch of the Pivotal Learning Center (PLC). Your resource for all your merchant training needs. Simply click on "Training" then select the training deck you want to view today and take advantage of pre-recorded training decks. Improve your industry knowledge and start...

PL Workflow Enhancement

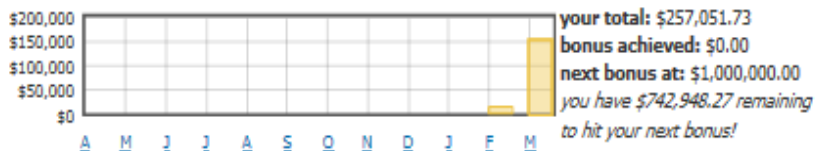
Jan 14 2015 With the new Pivotal Live release, merchant DBs will now be included in the email notifications that are generated when a merchant support Workflow Task is created. This provides Partners more visibility in regards to merchant...

Updated TSYS Placemat

Jan 13 2015 The TSYS placemat, located in the Resource Center, has been updated. EMV application release for the Ingenico merchant capabilities for the VX520 have been added. It is a good moment to review the new file.

Last 12 Months of Volume Growth

VAB Volume



Show Top 5 Merchants

Top 5 Agents					
Sales Rep	Merchant	Details	Sales	Gross Vol	Net Vol
Jaso	12	<a href="#">Details</a>	5,615	\$67,387.46	\$67,335.00
Sean	8	<a href="#">Details</a>	421	\$8,087.35	\$7,997.19
Stev	4	<a href="#">Details</a>	122	\$7,836.35	\$7,836.35

# 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.





# Application Phase

# PivotalLive New Merchant Application

## Application Checklist

- Merchant Application and Agreement
- Equipment Form

Pivotal Payments accepts new merchant applications via email, fax and through PivotalLive.

**Application Information**

Agent: Jason  [\(view profile\)](#)

Referral Agent:

Processor: TSYS

Profit Margin:

Equipment Profit Loss:

Merchant Tags:

**SPECIAL SALES PROMOTIONS:**

Sales Unit:

Ops RM:

**Merchant Application and Agreement**

Contract Version / ETF

Contract:

Term Duration:

**Merchant Business Information**

Name of Ownership Entity (Legal Name) \*

Name of Ownership Entity (AGAIN) \*

Zip \*  Plus4  City \*  State \*

Civic Number  Street Name  Unit  PO Box

Telephone #(Landline) \*  Federal Tax ID BACKWARDS \*  Federal Tax ID \*

**Attachments**

Attached Files:

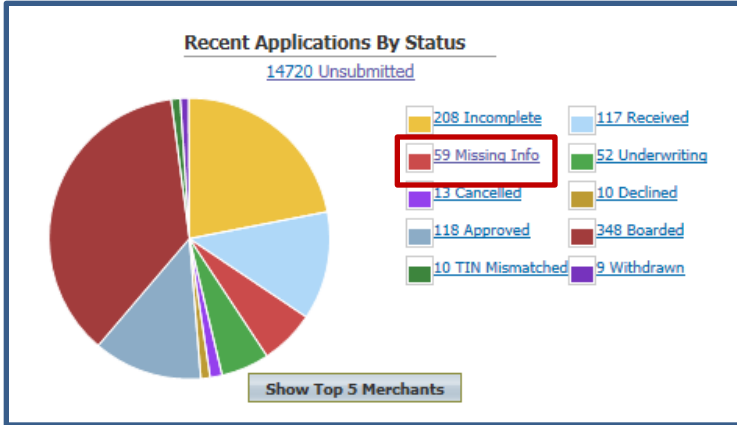
Attachment Type:

Merchant Application and Agreement

Equipment Form

Documents description:

Upload attachment electronically:



## 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.

### Missing Info Application Report

Apr 01, 2015 to Apr 17, 2015

Tags Selected:

Advanced...

Prev 17 Days Yesterday Month-To-Date Year-To-Date Next 17 Days

Agents Agent Hierarchy Tags Sales Division

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

# Pends - Application History Screen

**Integrated Comment and Status Notes in PL:**

---

**Comments**

Add new comments:  
(Public)

This comment is a response to a request made

80%

Save new comments

**Status Transitions**

Dec 05, 2014 12:21 PM - from: **Unsubmitted** to: **Received**

Dec 05, 2014 02:04 PM - from: **Received** to: **Incomplete**

Dec 05, 2014 02:04 PM - from: **Incomplete** to: **Received**

Dec 05, 2014 02:19 PM - from: **Received** to: **Incomplete**

Dec 05, 2014 03:49 PM - from: **Incomplete** to: **Received**

Dec 05, 2014 04:10 PM - from: **Received** to: **Incomplete**

Dec 08, 2014 11:54 AM - from: **Incomplete** to: **Received**

Dec 08, 2014 12:10 PM - from: **Received** to: **Incomplete**

Dec 08, 2014 12:12 PM - from: **Incomplete** to: **Received**

Dec 08, 2014 12:27 PM - from: **Received** to: **Underwriting**

Dec 08, 2014 12:36 PM - from: **Underwriting** to: **Approved**

Dec 08, 2014 02:13 PM - from: **Approved** to: **Boarded**

**Attachments**

**Attached Files:**

[tin\\_check.txt](#) by **System** on Dec 05, 2014 12:21 PM

[tin\\_check.txt](#) by **System** on Dec 05, 2014 02:04 PM

[ALL ABOUT PYROTECHNICS 63031 PAUL PRICE 2](#)

[Data Sheet for ALL ABOUT PYROTECHNICS - 286607](#)

[Data Sheet for ALL ABOUT PYROTECHNICS - 286607](#)

[Data Sheet for ALL ABOUT PYROTECHNICS - 286607](#)

Use Browse to select yet another file:

I confirm that these documents are those requested

Browse...

Attach Electronically

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

Tasks

Workflows

Accounting - Refund Request (Accounting)

[Start Workflow](#)

[Create Task](#)

Date Created	Priority	Assigned To	Closed by	
Jul 15, 2015 10:16 AM	normal	None	mortiz	
<a href="#">Provide Additional Info for Validation</a>				
Jul 16, 2015 08:30 PM	normal	None	validate6	
<a href="#">Provide Additional Info for Validation</a>				
Jul 17, 2015 12:41 PM	normal	dlaframboise	dlaframboise	<a href="#">Pended: Data Entry</a>
Jul 17, 2015 03:15 PM	normal	lpthibeault	lpthibeault	<a href="#">Provide Boarding Info</a>
Jul 17, 2015 06:53 PM	normal	None	phxwarehouse	
<a href="#">PPI Enter Equipment Information</a>				
Jul 21, 2015 03:28 PM	normal	mcruz	mcruz	<a href="#">Activation</a>

★ 638233517967 Save tracking results

Ship date : Fri 7/17/2015

PHOENIX, AZ US

Actual delivery : Tues 7/21/2015 12:36 pm

EAST BERNARD, TX US

**Delivered**

Signed for by: R.CUESTAS

Hold at FedEx Location | **Request Notifications** | **Obtain Proof of Delivery** | More actions

Equipment Tracking

Action: When a product is selected, TID is ignored. For Terminal leave Product name blank.

Enter appropriate V-Number	V6445195	Available V-Numbers are	V6445195
Select appropriate Product name		Available Product	
Serial Number	7315007CT032844	<b>Tracking Number *</b>	638233517967
<b>Deploy Date *</b>	07/17/2015	<b>Order Date *</b>	07/17/2015

# Reports (Boarded)

# Volume, Refunds & Chargeback Report

Jason **Volume Report**

Mar 01, 2015 to Mar 11, 2015

Tags Selected:

[Advanced...](#)

**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%
<a href="#">EMERALD CITY S</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">EMERALD CITY S</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">EMERALD CITY S</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">TINAS HAIR SALC</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">BLUE SAUCER - 2</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">MD NAILS - 2866</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">REMOTE CONTRC</a>	<a href="#">Details</a>	2866	427	<a href="#">Stever</a>	0	\$0.00	0.0%	0.0%
<a href="#">PA ANTIQUE MAL</a>	<a href="#">Details</a>	2866	427	<a href="#">Stever</a>	0	\$0.00	0.0%	0.0%
<a href="#">HAIR SENSATION</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">ROSE HAIR SALO</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">LOS MOLLETES -</a>	<a href="#">Details</a>	2866	427	<a href="#">Jason</a>	0	\$0.00	0.0%	0.0%
<a href="#">THE PERFECT SE</a>	<a href="#">Details</a>	2866	427	<a href="#">Stever</a>	0	\$0.00	0.0%	0.0%
<a href="#">STINKY DOG U-B</a>	<a href="#">Details</a>	2866	427	<a href="#">Stever</a>	0	\$0.00	0.0%	0.0%



» Home

# 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 - 2866	28660	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)
<b>20,069 Merchants</b>			<b>1,234</b>	<b>\$331,048,635.71</b>	<b>\$32,874,726.59</b>		<b>0</b>
<a href="#">Rooterman Clifton - 2866</a>	28660	4275	<a href="#">Stacey</a>	\$25,919.85	\$124.01	Apr 16, 2015	1
<a href="#">MARC J GROSS DDS - 2866</a>	28660	4275	<a href="#">Finical</a>	\$29,432.86	\$453.72	Apr 16, 2015	1
<a href="#">Concepcion Berlin - 2866</a>	28660	4275	<a href="#">Romulo</a>	\$20.19	\$212.78	Apr 16, 2015	1
<a href="#">HUNG M NGUYEN DDS PC - 2866</a>	28660	4275	<a href="#">Woody</a>	\$7,509.38	\$256.73	Apr 16, 2015	1
<a href="#">PERSNICKETY STITCHERS INC - 2866</a>	28660	4275	<a href="#">James</a>	\$4,847.17	\$160.10	Apr 16, 2015	1
<a href="#">J&amp;J MACHINERY INC - 2866</a>	28660	4275	<a href="#">Ashlee</a>	\$9,069.33	\$306.64	Apr 16, 2015	1
<a href="#">EAST SKY - 2866</a>	28660	4275	<a href="#">Vasiliv</a>	\$1,950.44	\$156.55	Apr 16, 2015	1
<a href="#">LEA'S SURVIVAL GYM - 63141</a>	63141	4275	<a href="#">Gary</a>	\$1,714.77	\$72.10	Apr 16, 2015	1







# Notifications

# PivotalLive Notification Management

## Change Merchant Application View

Using this screen, you can change the way new merchant applications appear. These two methods provide the same functionality but will display the application in different ways. Both views include realtime error reporting and an "instant-save" feature that ensures you will not lose your work if your browser/computer crashes.

**Notification:** This option when enabled will notify the agent associated to the merchant application whenever the status of the application changes.

**Save Application Fields On Save Button Only:** When enabled, will save changes made to application fields (while not yet submitted) only after the save button is pressed, instead of as each field is changed.

Notification	Enabled
Save Application Fields on Save Button Only	Disabled
Don't Show Migrated Tasks on Subscribed Tasks	Disabled
Task Subscription:	
Risk Group:	Risk Transaction Verification
Support Group:	Support
Miscellaneous Group:	Agent Application
	Retention Call Workflow



# Commission Statements



# Commissions & Residual Reporting

## Commission Statements

Report	Month	Volume	Profit	Share	Commission	Details
No Data Found						

## Tsys Residuals

[Commission Report 201502.xls](#)

Commission\_Report\_201502 [Read-Only] [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Mid	DBA Name	Agent NAME	Sub Agent	Open Date	Close Date	Agent Share	VISA/MC Vol	VISA/MC Cnt	DISC Vol	DISC Cnt	AMEX Vol	AMEX Cnt	WE
2	2866	RE	Jason	Ste	2/12/15			\$2,575.00	25	\$600.00	1	\$32.49	1	
3	2866	MI	Jason	Ja:	2/16/15			\$1,438.07	44	\$0.00	0	\$0.00	0	
4	2866	ST	Jason	Ste	2/16/15			\$110.10	6	\$0.00	0	\$0.00	0	
5	2866	HA	Jason	Ja:	2/16/15			\$787.04	29	\$23.00	1	\$0.00	0	
6	2866	EM	Jason	Ja:	2/16/15			\$3,399.79	305	\$25.55	2	\$0.00	0	
7	2866	DR	Jason	Ja:	2/16/15			\$262.17	21	\$0.00	0	\$0.00	0	





# Other

*Training, Resource Center, Contact Us, Features*

## Training

Training: Training

<http://training.pivotalpayments.com>

### Agent/ISO Training Informa

All new agents are strongly e  
numerous topics including ou  
Relationship Manager or Recr

Sales Partner Orientation and  
EST

1. Conference dial-in num
2. Go To Meeting URL: [ht](#)
3. Meeting ID: 817-444

Just click the "Join A Meeting  
code. **Note, please provide  
To Meeting.** If you have any  
support prior to the training session.



HELLO PIVOTALPAYMENTS

LOG OUT

HOME COURSES PRODUCTS RESOURCES CONTACT NEW TO PIVOTAL

**WELCOME TO THE PIVOTAL PAYMENTS TRAINING SITE!**

Here you will find helpful resources to strengthen your knowledge in merchant services, and grow your portfolio.  
You can join scheduled training calls including new partner orientation, product specific calls and more.



» Home

**Email:** [PartnerRM@pivotalpayments.com](mailto:PartnerRM@pivotalpayments.com)

**Partner Services**

**Phone:** 1 866 974-8682

**Fax:** 1 866 687-3742

**Email:** [partnerservices@pivotalpayments.com](mailto:partnerservices@pivotalpayments.com)

**Merchant Banking Change - ACH Group**

**Email:** [ach@pivotalpayments.com](mailto: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
Verifone VSVR046 Omni 3200,396	888-654-1696

