

PulsePoint Online Portal

Track Referrals, Measure Performance, and Drive Profits

A Powerful Tool for MSP Sales

PulsePoint is a secure online portal that provides MSPs with access to the information necessary to track leads, measure performance, and drive profits.

INTEGRATED PORTFOLIO MANAGEMENT SYSTEM –

combines the efficiencies of a referral tracking system with the insights of a Customer Information Management tool, and the data analytics of a dashboard reporting engine.

SEAMLESS & SECURE DATA INTEGRATION –

bring together a variety of systems and sources, consolidating into one interface.

SUPERIOR REFERRAL ENGINE –

better performance tracking leads to more productive business relationships with referral partners.

PulsePoint is multi-tiered, featuring an advanced rules and user rights engine, so both you and your referral partners gain visibility into the relationship – turn insights into actions.

APPSTREAM –

replaces paper intensive systems by utilizing integrated end-to-end data collected throughout the lead to sale to boarding process.

COMMISSION AND INCENTIVE PROGRAMS –

delivers robust commission and compensation details and reporting by agent, customer, referral sources and marketing campaigns. Fully customizable to MSP's processes and systems.

IMPROVED MSP SALES EXPERIENCE –

visibility and performance metrics are keys to improved MSP Sales productivity. PulsePoint aggregates data into a personalized Dashboard, providing one-click access to mission-critical information. And its personalized home page provides quick access to news, document repositories, incentive program ranking and performance monitors.



FOR MORE INFORMATION:

Contact your Elavon Portfolio Manager to learn more or call 800-819-6019



Take Your Business to the Next Level

SUPERIOR REFERRAL ENGINE

- Referral pipeline tracking & management
- Call lists
- Performance reports
- Calendar integration

IMPROVED MSP SALES EXPERIENCE

- Down-line commission reporting by customer, referral, campaign
- Secure/automated compensation reports and payments
- Volume & spread benchmark reporting
- REST API
- Lead/Opportunity Tracking
- Vendor Prospecting^C
- SMS/email Call Note Alerts^C
- Custom Reports^C

ENHANCED PORTFOLIO MANAGEMENT

- PCI compliance status
- History notes from both MSP and Elavon activities
- Activity-level triggers
- MerchWire - Merchant Statements on Demand
- AppStream – secure, end-to-end application creation, electronic or in-person signature, direct submission to Boarding and near real-time status updates using customer data and documents

C = coming soon!

Features	Elavon Basic	+ PulsePoint
Application Entry	✓	✓
Establish Templates		✓
Copy Functionality		✓
Automated Document Routing		✓
Customized Workflow		✓
Tablet Accessible		✓
Customer Application API		✓
E-Signature		✓
Merchant Statements	✓	✓
Call Notes	✓	✓
Call Note Alerts		✓
PCI Compliance Status	✓	✓
Batch & Settlement Detail	✓	✓
Integrated Referral Tracking		✓
Lead Referral API		✓
Custom Reports		✓
User-created Newsfeed		✓
Online Downline Compensation Reporting	✓	✓
Application/Document Storage		✓
Daily DashBoards		✓