

## P2 ISO Office

**YOUR BRAND. YOUR DATA. YOUR APPLICATION.**

With P2 ISO Office you get an industry-specific CRM application that's built in the cloud, on Force.com. Not only does it have all the bells and whistles you are looking for, with it you tap into innovation from both POS Portal and Salesforce.com and become connected to the industry. It's your ISO Office, with your brand, your data, your workflow, and your business rules. It's your opportunity to differentiate.

### The Industry:



### The Platform:



### Your Application:



## Merchant CRM

**GROW YOUR BUSINESS. EXPAND THE SYSTEM.**

From Lead-to-Activation, you get pre-built CRM functionality to manage the entire merchant lifecycle. Configure the system to meet your business needs and expand it as you grow.

- Lead Capture
- Pipeline Management
- Opportunity Management
- Application Processing
- Underwriting
- Merchant Boarding
- Residual Upload
- Payout Calculations
- Portfolio Analytics
- Transaction Hosting
- Risk Monitoring
- Reports and Dashboards
- Configurable Workflow
- Point & Click Page Layout
- Add/Remove Fields
- Email Templates

## Sales and Partner Portals

**CONNECT WITH AGENTS. CONNECT WITH PARTNERS.**

Sales and Partner Portals make it easy for agents or referral partners to send you deals, view deal status, and to get their residual payouts. Provide your agents and partners with the tools they need to board more merchants and give them confidence that you are paying them accurately.

- Branded Home Page with Portfolio Charts
- Manage Opportunities
- Submit Deals and View Deal Status
- Manage Pends
- View Monthly Residuals at Portfolio and Merchant Levels
- Receive Alerts Based on Merchant Activity

