Who we partner with

Bold sells through partners, not direct. If you already have merchant relationships, we provide the payments platform behind them — and you keep the relationship. **ISVs** integrate payments into software you already sell. **VARs and agents** resell payments alongside hardware, POS, or services. Both paths get the same platform and the same support; what differs is how you reach merchants.

Two ways to work with us

This is the first real decision you'll make, and it affects what you earn. Worth understanding before your kickoff call.

	Independent	Bold Advantage
Who sells	You do	You submit leads; Bold's team sells
Who boards the application	You do, in MX Connect	Bold does
Who owns the merchant relationship	You	Shared
Revenue share	Higher — you're doing more of the work	Lower
Training required	Full onboarding program	Lighter — focused on lead submission, reporting, and portfolio visibility

You're not locked in. Partners move between the two, and some start on Bold Advantage to learn the motion before going independent. Ask your onboarding team to walk both models against your actual situation.

What Bold provides

- **Transparent economics.** Your Schedule A details income and expenses to the penny. You'll always be able to see what you're earning and where the money went.
- **Portfolio ownership.** You own your portfolio outright, with the flexibility to borrow against it or sell it on your terms.
- **Automated boarding** to TSYS and First Data, with reusable pricing templates so you're not rebuilding the same configuration on every deal.
- **Full portfolio visibility** — daily volume, ACH, chargebacks, retrievals, merchant

history, and depository detail in real time.
- **Downline management** — manage and commission sub-agents, and run compensation analysis to see where performance is coming from.
- **Brand licensing and white-label options**, so you can lead with your brand or ours.
- **An open API** for real-time transaction data, portfolio analytics, and embedded payments.
- **A real team.** Onboarding, Revenue Operations, and Client Services are people you can call, not a chatbot.

What we ask of you

- **Six weeks** of access to the onboarding team, at roughly **3 hours a week** for training and strategy sessions.
- A goal of **one boarded merchant** by the end — ideally two or three.
- Named business and technical contacts we can work with.

How it works, start to finish

1. **First conversation.** We learn about your business, your merchants, and what you're trying to build.
2. **Choose your path** — Independent or Bold Advantage.
3. **Schedule A.** We build and agree your cost structure and revenue share.
4. **Setup.** We create your MX Connect portfolio and send credentials. Portfolio builds take 24–48 business hours, since branding is requested as part of the process.
5. **Kickoff call.** You meet the team who'll support you and we map out the six weeks.
6. **Onboarding.** Training, your first live application, and go-live support.
7. **Graduation.** You transition to your ongoing relationship team with a regular check-in cadence.

What to have ready

Having answers to these before your first call makes everything faster:
- **Your platform.** Cloud POS, desktop middleware, web-based, or something else — and if you're integrating, whether that's REST API, SDK, or webhooks.
- **Hardware plan.** Terminals, mobile, or integrated POS. Which models, and whether you'll deploy direct to merchants or hold your own inventory.
- **How you'll board.** Quick App, API-based, or manual portal entry.
- **Pricing programs** you expect to sell — cash discount, dual pricing, surcharge, interchange-plus.
- **Expected volume** — roughly how many merchant accounts per month.
- **Anything unusual** — high-risk verticals, specific MCCs, custom branding or firmware needs.

Ready to start?

Get in touch through For VARs & Agents or For ISVs, email sales@boldpay.io, or call (877) 515-6464. Building an integration? Start at boldpayments.io/developers.

Your Onboarding Training

Seven sessions across six weeks, live with your onboarding team. Roughly 3 hours a week. The goal is your first boarded merchant.

Session 1 — Strategy, Pricing & Analysis

Understanding the partnership economics and how to price a deal.

- Your Schedule A, walked line by line — revenue share, costs, and the miscellaneous monthly line for fee exclusions
- Pricing models: interchange-plus, cash discount, and flat rate, and which suits which merchant
- Statement analysis in ISO Amp — mapping interchange-plus pricing, projecting your residual, and generating a merchant proposal
- Working through real merchant statements to find savings

What you'll get: Pricing Strategy & Industry Alignment Guide, Sales Enablement & Objection Handling Guide.
Bring: a prospect's current processing statement, so we can run it live.

Session 2a — MX Connect Fundamentals

Learning your main workspace.

- Navigating the Applications, Clients, and Merchant tabs
- Building reusable pricing templates (App Engines) for tiered, dual pricing, and surcharge setups
- How your portfolio and any sub-agent hierarchy appear

What you'll get: Boarding an Application in MX Connect — a screen-by-screen walkthrough to follow on your own, plus the MX Connect overview deck.

Session 2b — The Boarding Process

What underwriting needs and why.

- Required documentation: business licenses, voided checks, driver's licenses
- The Quick App process end to end, from corporate information through the processing profile
- What your merchant sees when they receive and sign the application
- Underwriting timelines — typically 24–48 business hours for manual review

What you'll get: Partner Merchant Boarding Guide, and the Merchant Profile Sheet for sending merchant details to our team.

Session 2c — Your First Live Application

Submitting a real deal with your trainer on the call.

- Entering a live application together, checking accuracy as you go
- Following it through Received, Under Review, and Pend
- Clearing pends — responding to underwriting requests for documents or corrections

Most partners board their first merchant during this session rather than practicing on a mock account.

Session 3a — Operations & Implementation

Managing the account after approval, and getting hardware in place.

- Meeting Client Services and understanding the handoff after approval
- VAR sheets and file build requests
- Ordering equipment — available devices and how deployment works

Requesting a VAR: if you're submitting your own cases in MX Connect, follow the VAR sheet requirements in the Priority knowledge base. Otherwise, send us a case by email or phone and we'll handle the request for you — that's usually the faster route.
What you'll get: DataCap Rental Program Activation steps, if DataCap middleware applies to you. Note that DataCap sends an activation link directly to you, and setup can't be completed until you click it.

Session 3b — Merchant Management & Compliance

Giving your merchant their tools and keeping them compliant.

- MX Merchant — Quick Pay, reporting, and statements. Statements live here; there's no paper.
- PCI and TIN compliance, and how to display compliant pricing on signage and receipts
- Same Day Funding through the Defyne/Privvy portal, including offer codes, if you're eligible

What you'll get: PCI Compliance FAQ and the Defyne/Privvy application steps.
Worth flagging to your merchants early: PCI compliance carries a 60-day clock from approval, and a monthly non-compliance fee applies after that.

Session 4 — Review & Graduation

Wrapping up and setting the ongoing rhythm.

- A recap across pricing, MX Connect, equipment, and compliance
- An open retrospective — what worked, what didn't, and what we should

change
- Introduction to your ongoing relationship team and the monthly check-in schedule

Where to get help

Team	When	Contact
Revenue Operations	Before the MID exists — applications, boarding, pricing, training, statement analysis	prm@boldpay.io · (877) 515-6464 Opt 2
Client Services	After the MID exists — merchant setup, hardware, boarding updates, funding	support@boldpay.io · (877) 515-6464 Opt 1
Open a case	Either of the above, in writing	kb.versitech.com/bold/s/open-a-support-case

Simplest rule: before the MID, Revenue Operations. After the MID, Client Services.

Notes for the build team — remove before publishing

Link that will not work for partners: the DataCap VAR sheet instructions were provided as a priorityis.lightning.force.com URL. That's Priority's internal Salesforce interface — partners can't open it. The partner-facing equivalent lives on priorityis.my.site.com. Same issue applies to the ACH.com public-inquiries link captured in the contact directory. Both need their community-site URLs before they can be linked from the Hub.

MX Connect Information deck — the DocSend link is a 5-page overview from Priority's SMB Product Strategy Team. Two cautions: DocSend links are view-tracked and can be revoked by the sender, so it's worth requesting the source file from Priority for the Hub rather than linking through DocSend. Confirm also that its content matches our current MX Connect UI.

Still missing, referenced above as "what you'll get":

- Generic Schedule A presentation (partner-agnostic) — Session 1
- ISO Amp walkthrough (partner-agnostic) — Session 1. Confirm whether ISO Amp and "ISOQuote" are the same tool.
- Residual introduction — no source recording exists; needs a session with Gus
- Hardware ordering SOP — Session 3a. The VAR guidance above is drawn from what was supplied and needs Client Services to confirm.
- MX Merchant written guide — Session 3b. Six module videos exist with no

companion one-pagers.

Content decisions embedded above, worth a check: the Independent vs. Bold Advantage comparison table states the revenue share is higher for Independent partners. That's accurate per the program description, but the table is the most direct statement of it we'd publish — worth Colette or Peggie confirming the framing. The PCI non-compliance fee is described as "a monthly fee" rather than the specific amount, since that figure should be verified before it goes on a public page.