

Partner Onboarding Journey - What to Expect

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Welcome to the Bold Payments partner ecosystem. This map outlines your path from initial kickoff to your first live merchant transaction. Our structured program is designed to provide you with the tools, training, and strategic support necessary for long-term growth.

Program Fundamentals

Before diving into the weekly phases, here is the baseline for your onboarding experience:

- **Duration:** A standard six-week timeline.
- **Time Commitment:** Approximately 3 hours per week for training and strategy sessions.
- **Dedicated Support:** You will be assigned a dedicated Growth Manager or Rev Ops Team
- **Primary Goal:** Successful submission and "Go-Live" status of your first merchant account.

The Onboarding Timeline

Phase	Focus	Key Activities
Phase 1: Foundation	Strategy & Pricing	Kickoff call, revenue share review, and pricing model analysis.
Phase 2: Platform	System Mastery	MX Connect CRM training and ISO Amp statement analysis.

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Phase	Focus	Key Activities
Phase 3: Execution	Live Boarding	Master underwriting guidelines and submit your first live application.
Phase 4: Growth	Ops & Graduation	Equipment ordering, post-approval support handoff, and program retrospective.

Weekly Session Breakdown

Week 1: Strategy & Analysis

- **Schedule A Review:** Walkthrough of your revenue share structure and costs.
- **Pricing Models:** In-depth discussion of Interchange Plus, Cash Discount, and Flat Rate models.
- **Statement Analysis:** Hands-on training with ISO Amp to identify merchant savings opportunities.

Weeks 2-3: Platform Fundamentals & Boarding

- **MX Connect Navigation:** Mastering the Applications, Clients, and Merchant tabs.
- **Pricing Templates:** Creating "App Engines" for standardized, reusable pricing.
- **Underwriting Training:** Reviewing documentation requirements (Business Licenses, Voided Checks) and SLA expectations.
- **Live Submission:** Real-time trainer support while entering your first live deal.

Weeks 4-5: Operations & Merchant Management

- **Implementation:** Introduction to Client Services and the technical VAR/File build process.
- **Equipment Strategy:** Reviewing available hardware (PAX, etc.) and the online ordering portal.

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- **Compliance:** Reviewing PCI standards and compliant pricing displays.

Week 6: Review & Graduation

- **Feedback Loop:** An open retrospective to discuss your experience and identify process improvements.
- **Success Metrics:** Verification of "Go-Live" status and first transaction success.
- **Handoff:** Formal transition to Growth Management/Rev Ops team

Support Directory

Department	Purpose	Contact Info
Partner Support	Pre-MID, Application & Boarding Support	prm@boldpay.io / 877-... ▾
Client Services	Post-MID, Account & Processing Support	support@boldpay.io / ... ▾
Technical Support	VAR Requests & Equipment Issues	support@boldpay.io / ... ▾

Next Steps

1. **Schedule Kickoff:** Ensure your kickoff meeting is on the calendar for .
2. **Submit Readiness Guide:** Confirm all technical and operational requirements are collected.
3. **Identify First Lead:** Prepare a merchant statement for analysis during Session 1.

Trainer:

Partner:

Date: