

Welcome to the Agent Portal!

We're excited to partner with you and help you succeed. This guide provides a detailed walkthrough of the Agent Portal's features and functionalities, ensuring you can maximize efficiency and deliver seamless services to your clients.



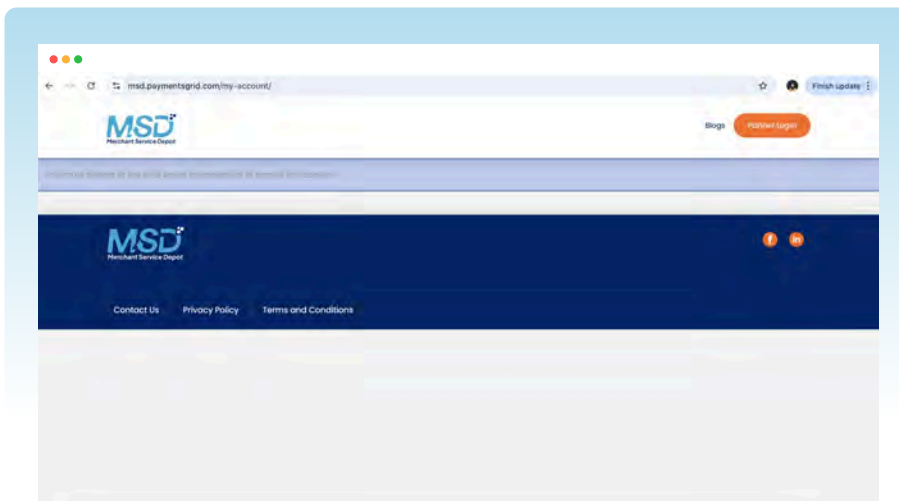
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Getting Started with the Portal

• Access the Portal:

Locate the link provided in your welcome packet and open it to access the login page.

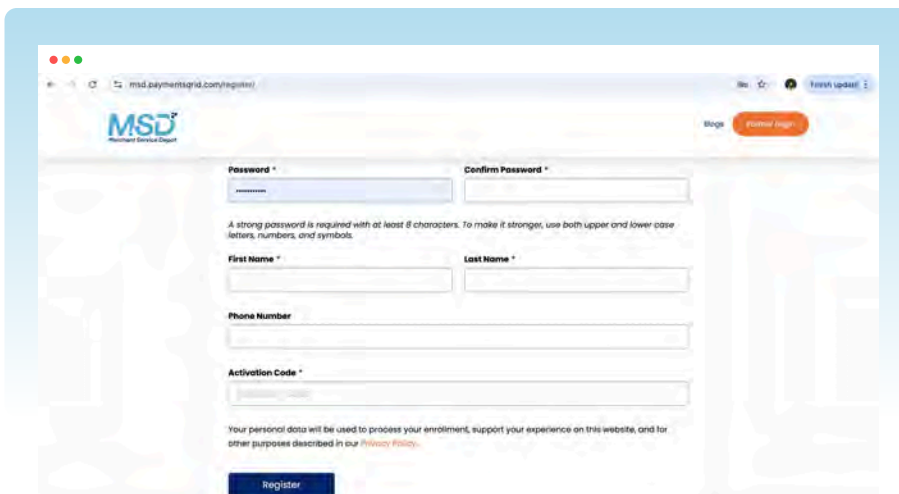


• Register Your Account:

Click "**Partner Login**" and select "**Register Now**" at the bottom of the login page.

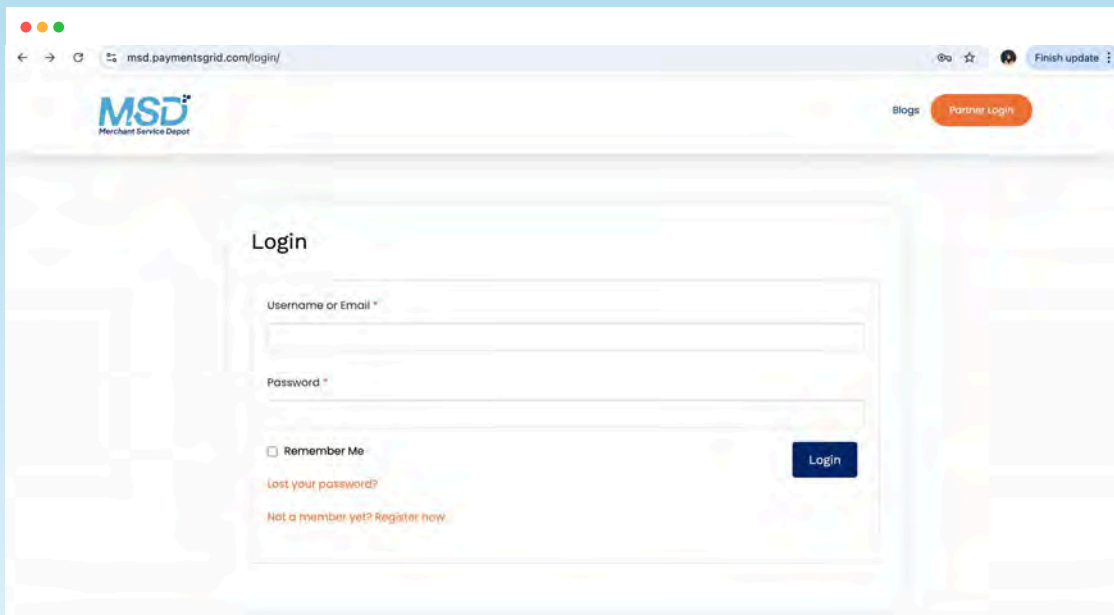
Fill out all required fields, including your contact information, and create a strong password.

Click "**Register**" to complete your account setup.

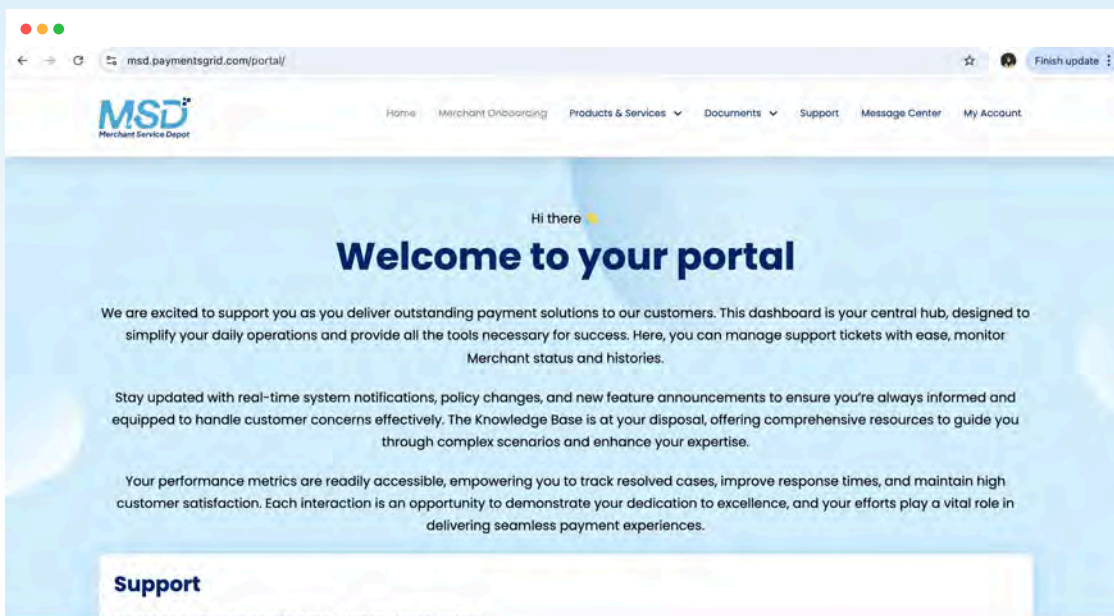


• Log In

Use your registered email and password to log in. You'll be redirected to the portal's homepage upon successful login.



The screenshot shows the login page of the MSD Merchant Service Depot. The browser address bar displays 'msd.paymentsgrid.com/login/'. The page features the MSD logo in the top left corner and a 'Partner Login' button in the top right corner. The main content area is titled 'Login' and contains a form with two input fields: 'Username or Email *' and 'Password *'. Below the password field is a checkbox labeled 'Remember Me'. To the right of the 'Remember Me' checkbox is a blue 'Login' button. Below the 'Login' button are two links: 'Lost your password?' and 'Not a member yet? Register now'.



The screenshot shows the homepage of the MSD Merchant Service Depot portal. The browser address bar displays 'msd.paymentsgrid.com/portal/'. The page features the MSD logo in the top left corner and a navigation menu in the top right corner with links: Home, Merchant Onboarding, Products & Services, Documents, Support, Message Center, and My Account. The main content area has a blue background and contains the following text:

Hi there 🌟

Welcome to your portal

We are excited to support you as you deliver outstanding payment solutions to our customers. This dashboard is your central hub, designed to simplify your daily operations and provide all the tools necessary for success. Here, you can manage support tickets with ease, monitor Merchant status and histories.

Stay updated with real-time system notifications, policy changes, and new feature announcements to ensure you're always informed and equipped to handle customer concerns effectively. The Knowledge Base is at your disposal, offering comprehensive resources to guide you through complex scenarios and enhance your expertise.

Your performance metrics are readily accessible, empowering you to track resolved cases, improve response times, and maintain high customer satisfaction. Each interaction is an opportunity to demonstrate your dedication to excellence, and your efforts play a vital role in delivering seamless payment experiences.

Support

Merchant Onboarding Process

The portal streamlines merchant onboarding into two key stages: Pre-Vetting and Boarding. Each stage is designed for accuracy and speed to ensure a smooth onboarding experience.

Step 1: Pre-Vetting

Pre-vetting determines the most suitable processor for a merchant's business model before the formal onboarding process.

01 Navigate to the **"Merchant Onboarding"** tab and select **PreVet a Merchant**.

02 Complete the pre-vet form:

- Enter basic details about the merchant (e.g., business name, industry, estimated monthly volume).
- Specify any unique business requirements or challenges.

03 Click **"Submit"** to send the request to the onboarding team

04 The onboarding team will:

- Reach out to multiple processors to identify the best fit.
- Notify you of the results within 24 hours.

Important Notes:

- Pre-vets may take longer if processors require additional details.
- Ensure the information provided is accurate to avoid delays.

Step 2: Boarding a Merchant

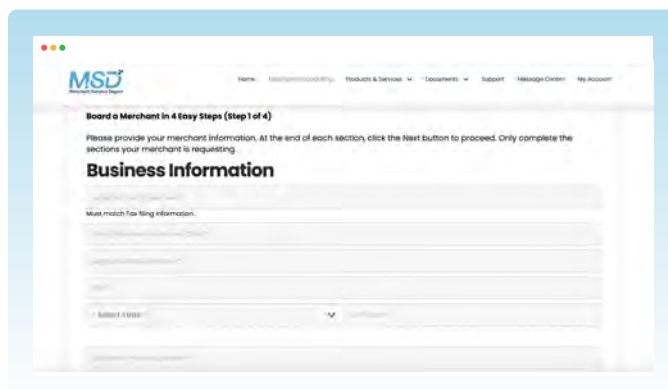
Once pre-vetting is complete, you can proceed to formally onboard the merchant.

Important Notes:

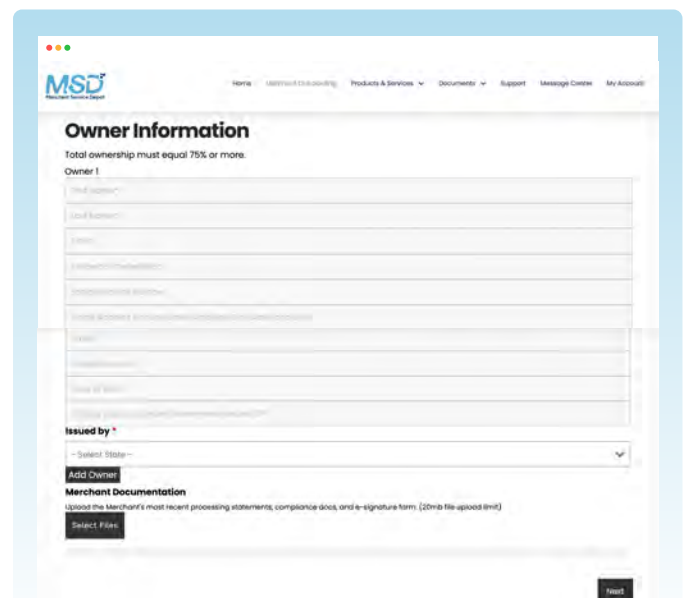
Note – Pre-vetting all merchants before onboarding is not required. If you are certain of the appropriate processor for approval, you can proceed directly to the onboarding tab to complete the application and upload the necessary supporting documents Go to the "Board the Merchant" section.

Business and Owner Details:

- Fill in all mandatory fields, such as business address, tax identification number, and owner's personal details.
- Use the **"Select Files"** button to upload all required documents, including proof of business and identification.



The screenshot shows the 'Board a Merchant' form, Step 1 of 4: Business Information. The form includes fields for Business Name, Business Address, Business Phone, Business Email, and Business Website. There is a 'Select Files' button for uploading documents. The form is titled 'Board a Merchant in 4 Easy Steps (Step 1 of 4)' and includes instructions: 'Please provide your merchant information. At the end of each section, click the Next button to proceed. Only complete the sections your merchant is requesting.' The form is titled 'Business Information' and includes a note: 'Must match tax filing information.'



The screenshot shows the 'Owner Information' form. The form includes fields for Owner Name, Owner Address, Owner Phone, Owner Email, and Owner Website. There is a 'Select Files' button for uploading documents. The form is titled 'Owner Information' and includes a note: 'Total ownership must equal 75% or more.' The form is titled 'Owner Information' and includes a note: 'Total ownership must equal 75% or more.' The form is titled 'Owner Information' and includes a note: 'Total ownership must equal 75% or more.'

Step 2: Boarding a Merchant

Processing Information:

- Indicate whether the merchant requires processing by checking the **"My Merchant needs Processing"** box.
- Enter relevant details, including estimated transaction volumes and preferred processing type.

Additional Options:

- If issuing is required, select the appropriate checkbox and provide necessary details.
- For gateway setup, choose the appropriate options and input pricing details.

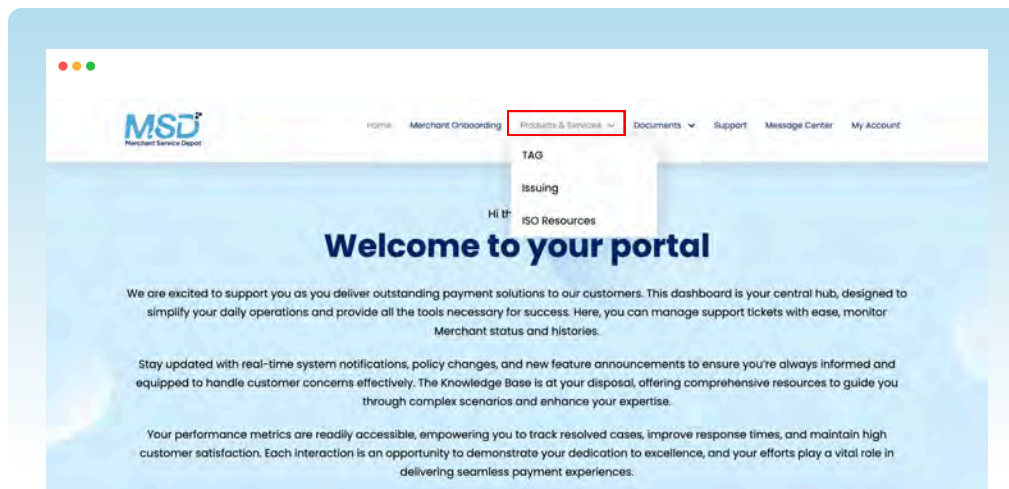
Review all information and click "Send" to finalize the submission.

- A copy of the application will be sent to your registered email.
- The onboarding team will review the submission and provide updates.

Portal Navigation and Features

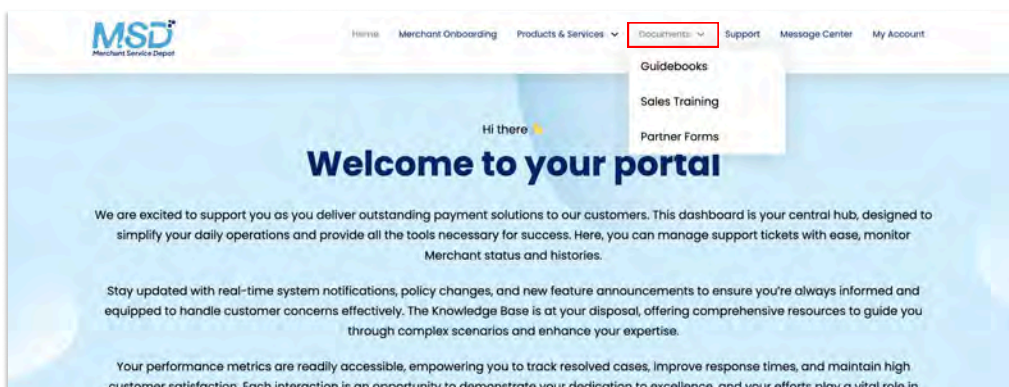
Products and Services

- Explore the comprehensive list of products MSD offers.
- Access detailed documents for each product, including feature guides and specifications.
- If you need further assistance or customization options, create a support ticket. A sales expert will contact you promptly.



Documents

- This tab provides a centralized location for all relevant documents.
- Quickly download forms, templates, and other resources to support your operations.



Guidebooks

Access extensive resources, including:

- **Gateway setup instructions**
- **Operational guidelines**
- **Checklists for smooth onboarding and processing**

Guide Books

Gateway Handbook

Download

MSD High Risk UW Guidelines

Download

MSD Issuing Handbook

Download

Schedule A 2025

Download

US Checklist & Boarding Requirements

Download

Sales Training

Find training materials to enhance your skills, including:

- **Toolkits for pitching products effectively**
- **Pre-written scripts for client interactions**
- **Checklists for smooth onboarding and processing**

Sales Training

MSD Agent Tool Kit Email

Download

MSD Agent Tool Kit Objection

Download

MSD Agent Tool Kit Sales Acumen

Download

MSD Agent Tool Kit Script

Download

Support

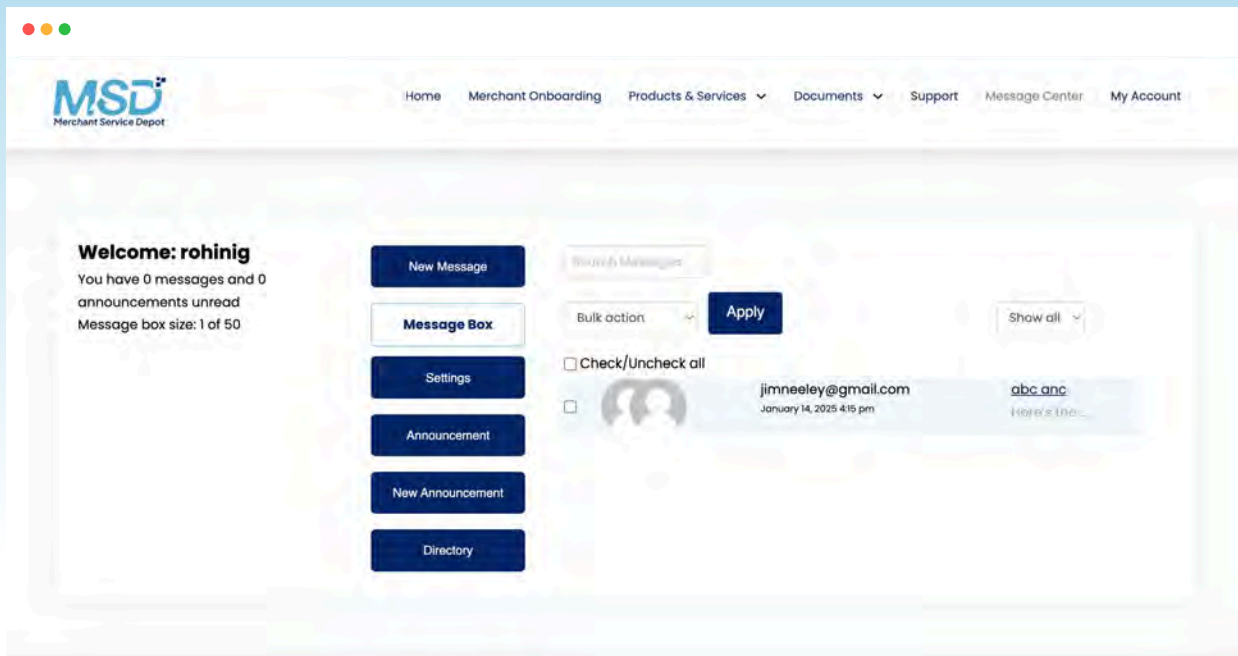
Organized by department, this section ensures your queries are routed efficiently:

The screenshot shows the MSD Merchant Service Depot Support page. At the top, there is a navigation bar with links: Home, Merchant Onboarding, Products & Services (with a dropdown arrow), Documents (with a dropdown arrow), Support (highlighted), Message Center, and My Account. Below the navigation bar, the page title is "Support" with a subtitle: "Please select the department that aligns with your inquiry to ensure faster assistance." There are three buttons: "Sales" (highlighted with an orange underline), "Onboarding", and "Support". Below these buttons, there is a text prompt: "For inquiries related to products, pricing, or proposals." This is followed by a form with two input fields: "First Name" and "Last Name". Below these fields is a "Topic" dropdown menu. At the bottom of the form is a "Message" label and a large text area for the user to enter their inquiry details.

- ➔ Select the department that aligns with your issue (e.g., technical support, account management).
- ➔ Submit detailed support requests to expedite resolution.

Message Center

This tab consolidates all notifications related to:



➔ Pre-vet submissions

➔ Onboarding updates

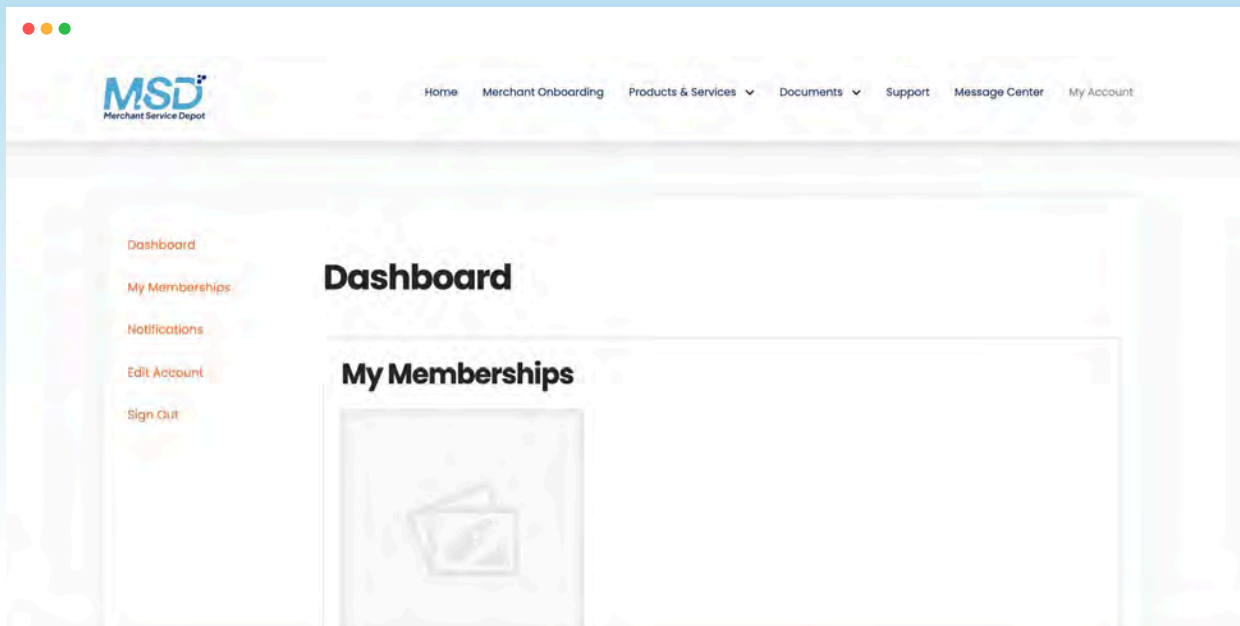
➔ Support ticket responses

Important Notes:

This feature is read-only and designed for updates and notifications. As an agent, you cannot initiate conversations. For inquiries, submit your request via the support tab. The MSD team will review and initiate a conversation, after which you can respond through the message inbox.

My Account

Manage your account settings with ease:



➔ Update personal details

➔ Change your password


➔ Review your account activity

Key Tips for Maximizing Efficiency:

1. Double-check all information before submitting forms to prevent delays.
2. Keep track of application statuses via the Message Center.
3. Use the Guidebooks tab as a quick reference for processes and best practices.
4. Reach out to the support team promptly if you encounter any issues or need clarification.

Key Tips for Maximizing Efficiency

- 01 Double-check all information before submitting forms to prevent delays.
- 02 Keep track of application statuses via the Message Center.
- 03 Use the Guidebooks tab as a quick reference for processes and best practices.
- 03 Reach out to the support team promptly if you encounter any issues or need clarification.



The whole MSD team would like to welcome you to our family. We couldn't be more excited to provide you excellent service and collaboration.

At the end of the day we are here to earn the right to your business, and we appreciate the opportunity to do so.

The Merchant Service Depot team