

**Student
Debt
Solutions**

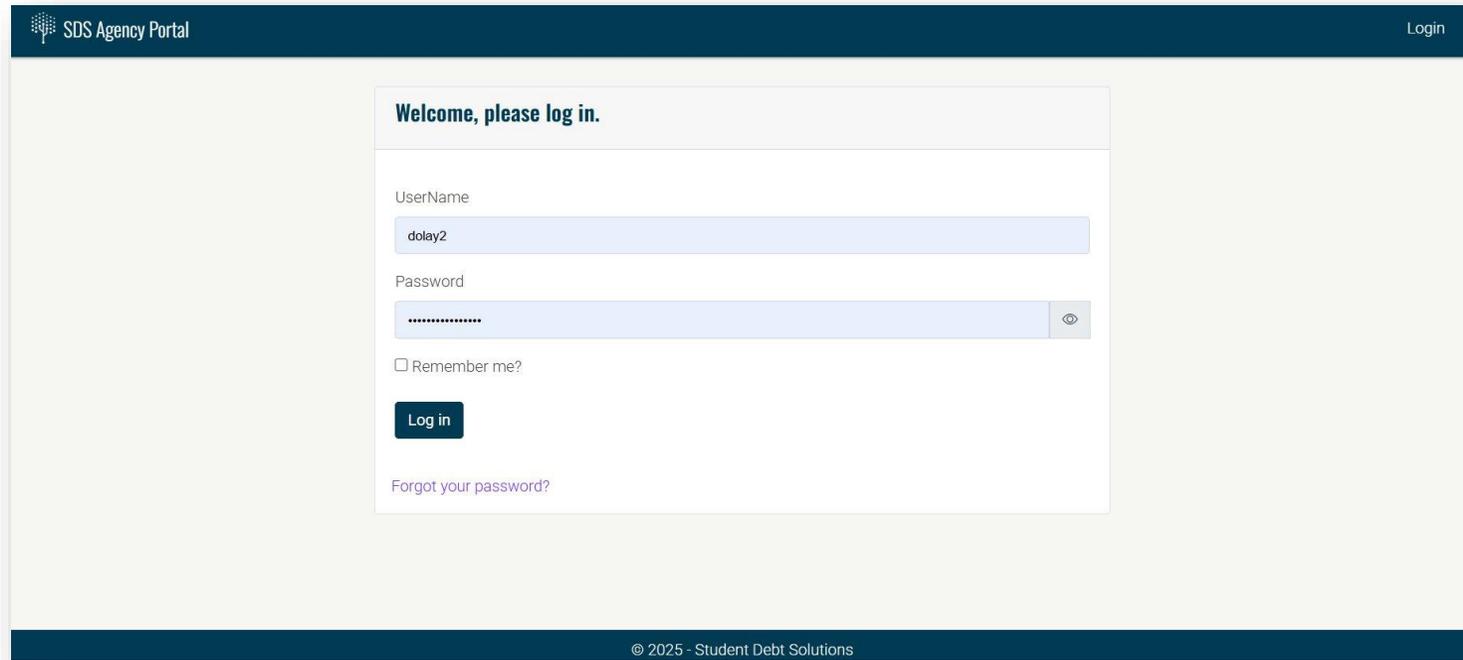
Agency Portal Deep Dive



Webinar Objectives

Goals:

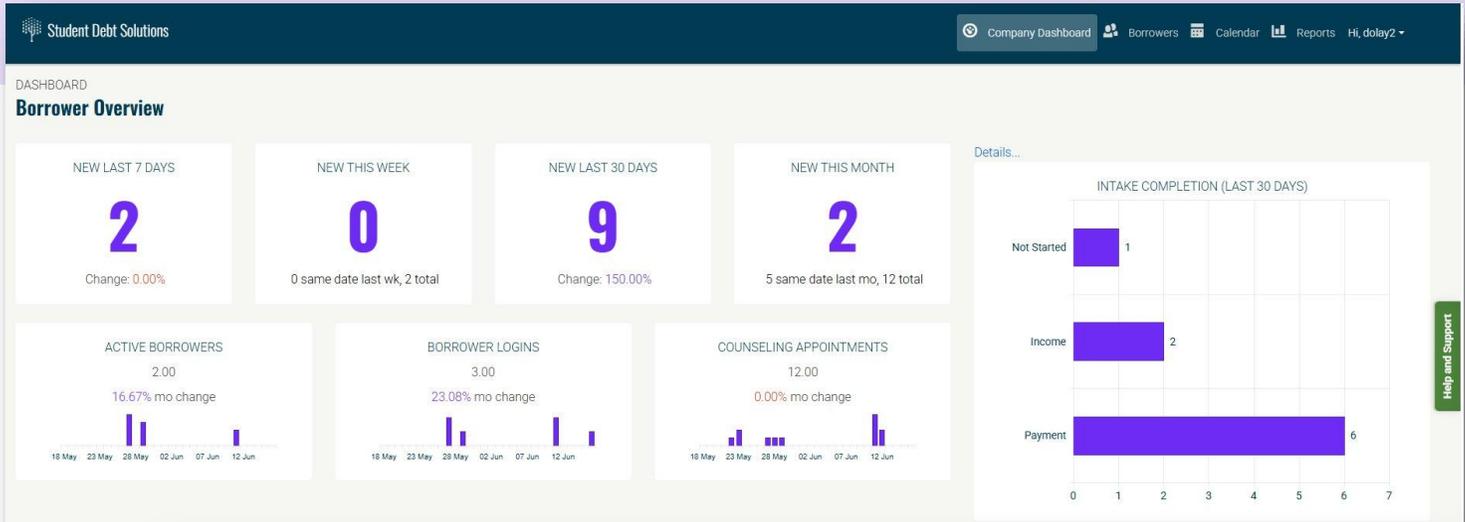
- Take a deep dive into the Agency Portal and discover how to maximize its features for tracking borrower progress, generating reports, and managing client cases efficiently.
- Understanding SDS Support functions and workflows
- Understand best practices for ticket creation for both agencies and borrowers.



The screenshot displays the login interface for the SDS Agency Portal. At the top left, the text "SDS Agency Portal" is visible next to a small icon. At the top right, there is a "Login" link. The main content area features a white box with a light blue header that reads "Welcome, please log in." Below this header, there are two input fields: "UserName" with the text "dolay2" and "Password" with a masked password "*****". To the right of the password field is an eye icon for toggling visibility. Below the password field is a checkbox labeled "Remember me?". A dark blue "Log in" button is positioned below the checkbox. At the bottom of the white box, there is a link that says "Forgot your password?". The footer of the page contains the copyright notice "© 2025 - Student Debt Solutions".

SDS Agency Portal: Dashboard

- Agency Overview
 - New Activity
 - New Last 7 days
 - New last 30 days
 - New in the Last Month
 - New in the last week
- Borrower Progress Trends and Insights
 - Expand to view a detailed breakdown
 - Gather insights on borrower progress
- Per Channel Activity Break Down
 - Compare borrower volume from different sources/programs
- Upcoming Counseling Sessions



Dole	January	February	March	April	May	June	Total
Not Started	0	19	2	0	1	0	22
Income	1	8	0	0	2	0	11
Loans	1	1	5	0	1	0	8
Questionnaire	3	0	0	0	0	0	3
Solutions	1	2	2	1	0	0	6
Payment	2	0	1	0	8	2	13
Schedule	0	0	1	0	0	0	1
Total	8	30	11	1	12	2	64

Agency Portal: Borrowers

- Search/Filter Borrowers List
- Export Borrowers List to CSV
- Add a New Borrower
 - Expert Mode
 - BK Adversary Analysis
- Borrower Statuses
 - Active/Verified
 - Last Step completed
 - Icon Identifies

Name	Username	Email	Affiliate / Chan...	Status	Progress	Appoint...	Assigned...	Login Co...	Last Login	Date created
Bonita Mims	BMims	jenduran14+bmims@gmail.com	Kiwi No fee Except Counseling	Active	Payment	6/11/2025	Dave Danielson	1	2025/06/11 9:20 AM	6/11/2025
Jessie Land	JLand	jenduran14+jland@gmail.com	Kiwi No fee Except Counseling	Active	Payment	6/11/2025	Melissa Maguire	1	2025/06/11 7:35 AM	6/11/2025
Paul Hunt	PHunt	jenduran14+phunt@gmail.com	lime	Active	Payment			1	2025/05/29 11:24 AM	5/29/2025
Jacquelynn Escobar	JEscobar	jenduran14+jescobar@gmail.com	citrus	Active	Payment			1	2025/05/29 11:18 AM	5/29/2025
Darren Neely	DNeely	jnduran14+dneely@gmail.com	citrus	Unverified	NotStarted			0		5/29/2025
Andrew AttestationTest2	AAttestationTest2	andrew.marshall.1972+AAttestatio...	EM Test	Active	Income			0		5/27/2025
Salvatore Chan	SChan	jenduran14+schan@gmail.com	citrus	Active	Payment			1	2025/05/27 12:53 PM	5/27/2025
Jonnie Hancock	JHancock	jenduran14+jhancock@gmail.com	citrus	Active	Payment			1	2025/05/27 12:19 PM	5/27/2025
Andrew AttestationTest1	AAttestationTest1	andrew.marshall.1972+AAttestatio...	EM Test	Active	Income			0		5/27/2025
Paul Ramsey	PRamsey	jenduran14+ramsay@gmail.com	citrus	Active	Payment			1	2025/05/16 1:29 PM	5/16/2025

Agency Portal: Calendar

- View Scheduled Counseling Sessions for your Agency all in one place.
- Only viewable for Agency users with Admin or Counseling Permissions.

The screenshot displays the 'Upcoming Appointments' calendar interface. The header includes the 'Student Debt Solutions' logo, navigation links for 'Company Dashboard', 'Borrowers', 'Calendar', and 'Reports', and a user profile 'Hi, doday2'. The calendar is set to 'Week' view for the period from Sunday, June 15, 2025, to Saturday, June 21, 2025. The grid shows two orange appointments labeled '15 Minute Meeting' on Monday, June 16, 2025, at 12:00 PM and 1:00 PM. A red arrow points to the 12:00 PM appointment. A 'Help and Support' button is visible on the right side of the calendar.

	Sun, 6/15	Mon, 6/16	Tue, 6/17	Wed, 6/18	Thu, 6/19	Fri, 6/20	Sat, 6/21
all day							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
12:00 PM		15 Minute Meeting					
1:00 PM		15 Minute Meeting					

Agency Portal: Reporting

- Effective Channel Prices
 - View current pricing/product configurations for your Agency
- Assigned Promotions
 - Past and current promo codes in effect for your Agency/Channels
- Orders
- Borrowers Details
- Borrowers Progress
- Borrowers Loan Details
- Paid Client Insights

The screenshot shows the 'Reports' section of the Student Debt Solutions Agency Portal. The page has a dark teal header with the logo and navigation links: Company Dashboard, Borrowers, Calendar, Reports (active), and Hi, dolay2. The main content area is light green and features a table of reports. Each row contains a report name and a 'View Report' button. The reports listed are: Effective Channel Pricing, Assigned Promotions, Orders, Borrowers Details, Borrowers Progress, Borrower Loan Details, and Paid Client Insights. A vertical 'Help and Support' button is on the right side. At the bottom of the table, there are navigation icons and a page number '1'.

Report Name	
Effective Channel Pricing	View Report
Assigned Promotions	View Report
Orders	View Report
Borrowers Details	View Report
Borrowers Progress	View Report
Borrower Loan Details	View Report
Paid Client Insights	View Report

Agency Portal: My Account

- View User Profile
- Reset Password
 - This can also be done at any time from the login page as well
- View Webhooks

Student Debt Solutions

Company Dashboard Borrowers Calendar Reports Hi, dolay2

Company Dashboard / My Account

Profile Change Password Webhooks

Account Information

Username
dolay2

First Name Last Name
Gin Dee Too

Email
jenduran14@gmail.com

Update Profile

Company Dashboard / My Account

Profile Change Password Webhooks

Webhook Settings

Some explanation about setting this up for agency and for channels

Set for Agency Set for Channels

Webhook URL
http://myfakeapi.efiscal.net/api

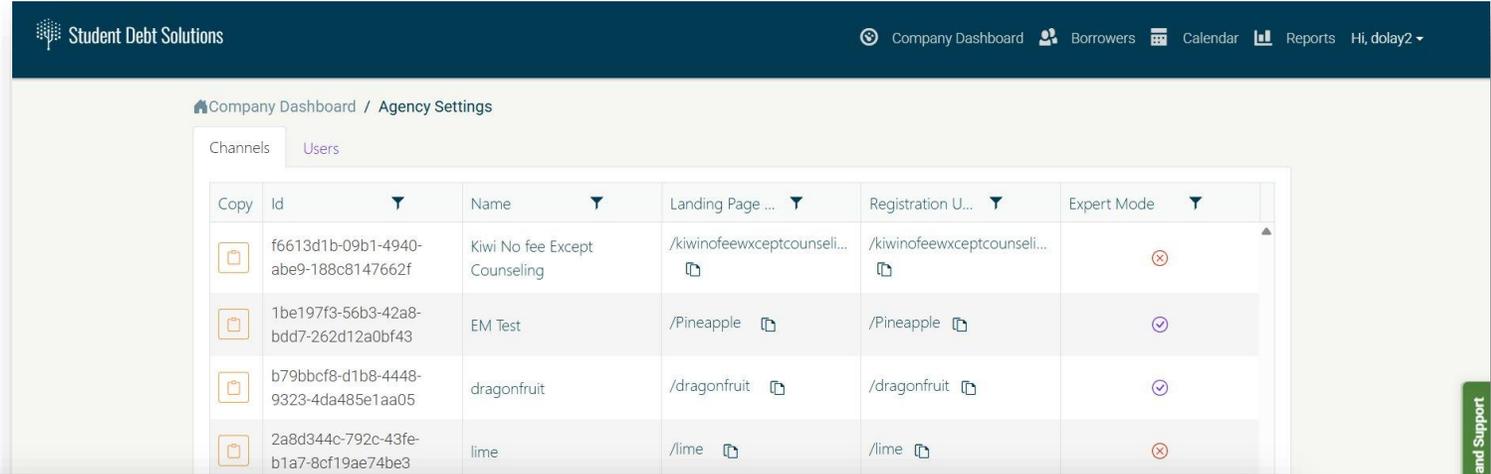
Webhook Events Select All

<input checked="" type="checkbox"/> Borrower Created	<input checked="" type="checkbox"/> Borrower Updated	<input type="checkbox"/> Counseling Scheduled	<input type="checkbox"/> Doc Prep Enabled
<input type="checkbox"/> Borrower Intake Advanced	<input type="checkbox"/> Action Plan Created	<input type="checkbox"/> Prepare Complete	<input type="checkbox"/> Sign Complete
<input type="checkbox"/> Send Complete	<input type="checkbox"/> Phone Call Complete		

Update Agency Webhook Settings

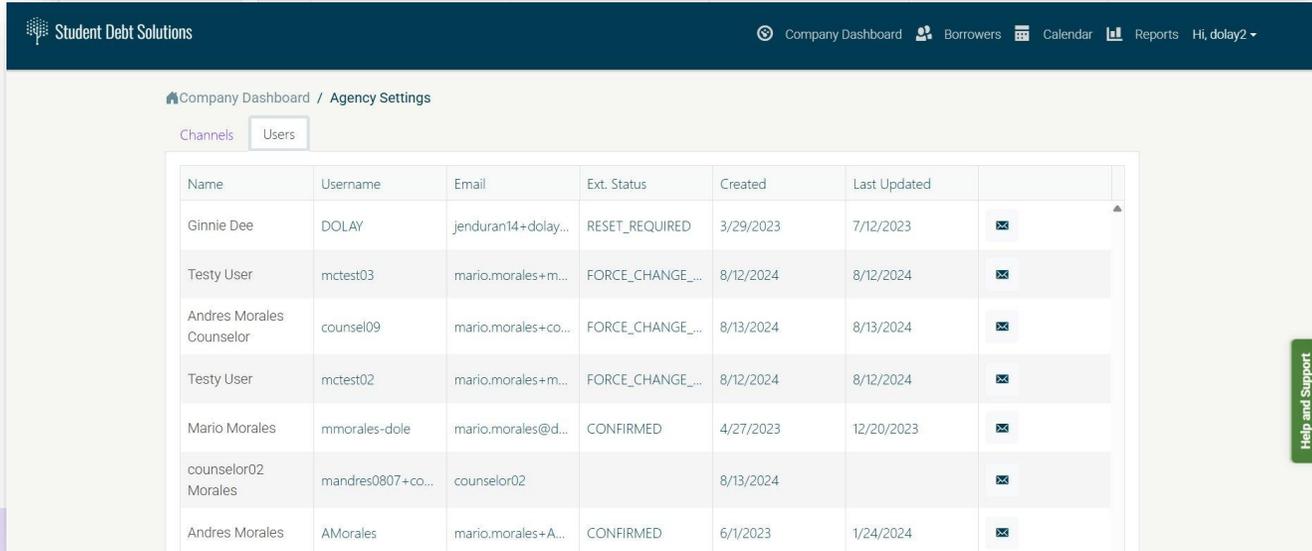
Agency Portal: Agency Settings

- Channel settings and details
 - Channel ID
 - Copy URL's easily
 - Channel type (standard/expert)
- User settings
 - For adding or deactivating users/permissions contact SDS admin



The screenshot shows the 'Channels' tab in the Agency Settings section. It displays a table with columns for Copy, Id, Name, Landing Page, Registration URL, and Expert Mode. There are four rows of channel data.

Copy	Id	Name	Landing Page ...	Registration U...	Expert Mode
	f6613d1b-09b1-4940-abe9-188c8147662f	Kiwi No fee Except Counseling	/kiwinofeeexceptcounseli...	/kiwinofeeexceptcounseli...	
	1be197f3-56b3-42a8-bdd7-262d12a0bf43	EM Test	/Pineapple	/Pineapple	
	b79bbcf8-d1b8-4448-9323-4da485e1aa05	dragonfruit	/dragonfruit	/dragonfruit	
	2a8d344c-792c-43fe-b1a7-8cf19ae74be3	lime	/lime	/lime	

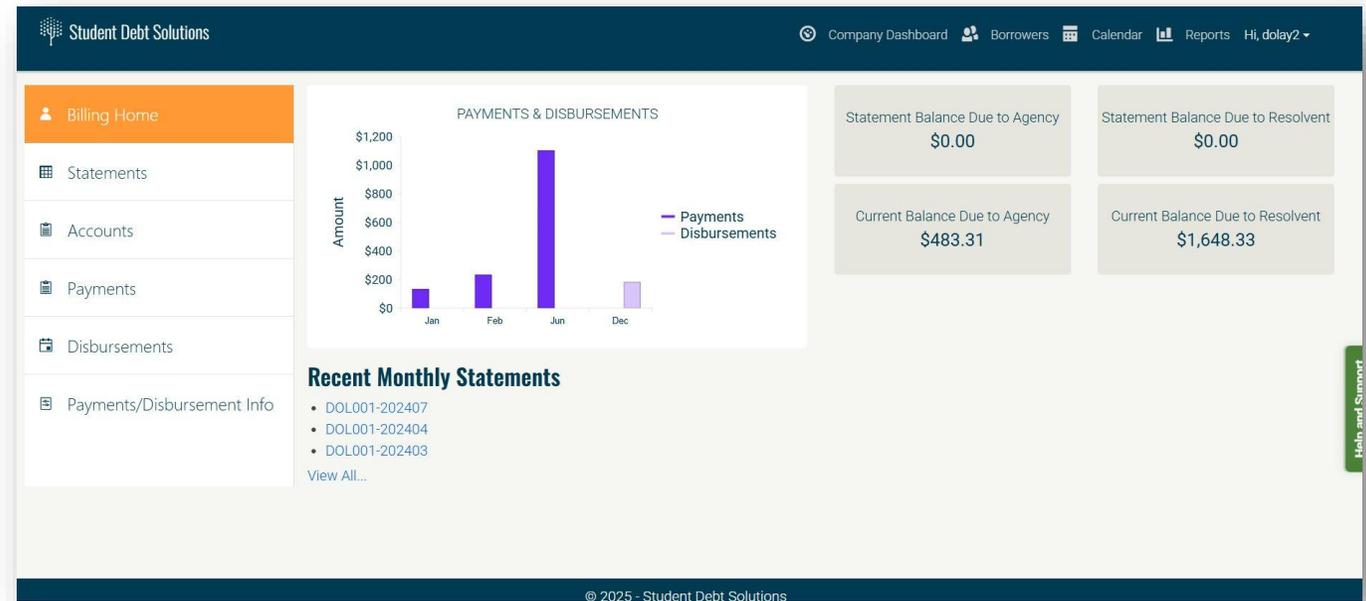


The screenshot shows the 'Users' tab in the Agency Settings section. It displays a table with columns for Name, Username, Email, Ext. Status, Created, Last Updated, and an action icon. There are seven rows of user data.

Name	Username	Email	Ext. Status	Created	Last Updated	
Ginnie Dee	DOLAY	jenduran14+dolay...	RESET_REQUIRED	3/29/2023	7/12/2023	
Testy User	mctest03	mario.morales+m...	FORCE_CHANGE_...	8/12/2024	8/12/2024	
Andres Morales Counselor	counsel09	mario.morales+co...	FORCE_CHANGE_...	8/13/2024	8/13/2024	
Testy User	mctest02	mario.morales+m...	FORCE_CHANGE_...	8/12/2024	8/12/2024	
Mario Morales	mmorales-dole	mario.morales@d...	CONFIRMED	4/27/2023	12/20/2023	
counselor02 Morales	mandres0807+co...	counselor02		8/13/2024		
Andres Morales	AMorales	mario.morales+A...	CONFIRMED	6/1/2023	1/24/2024	

Agency Portal: Billing Module

- Only visible for Agency users with that enable on their User Profile
- View past and current statements
- See past payments and disbursements
- View revenue/payment info by channel
- Make credit card payments for Statements with a balance owed to Resolvent
- Safely and securely enter your ACH information for payments/disbursements

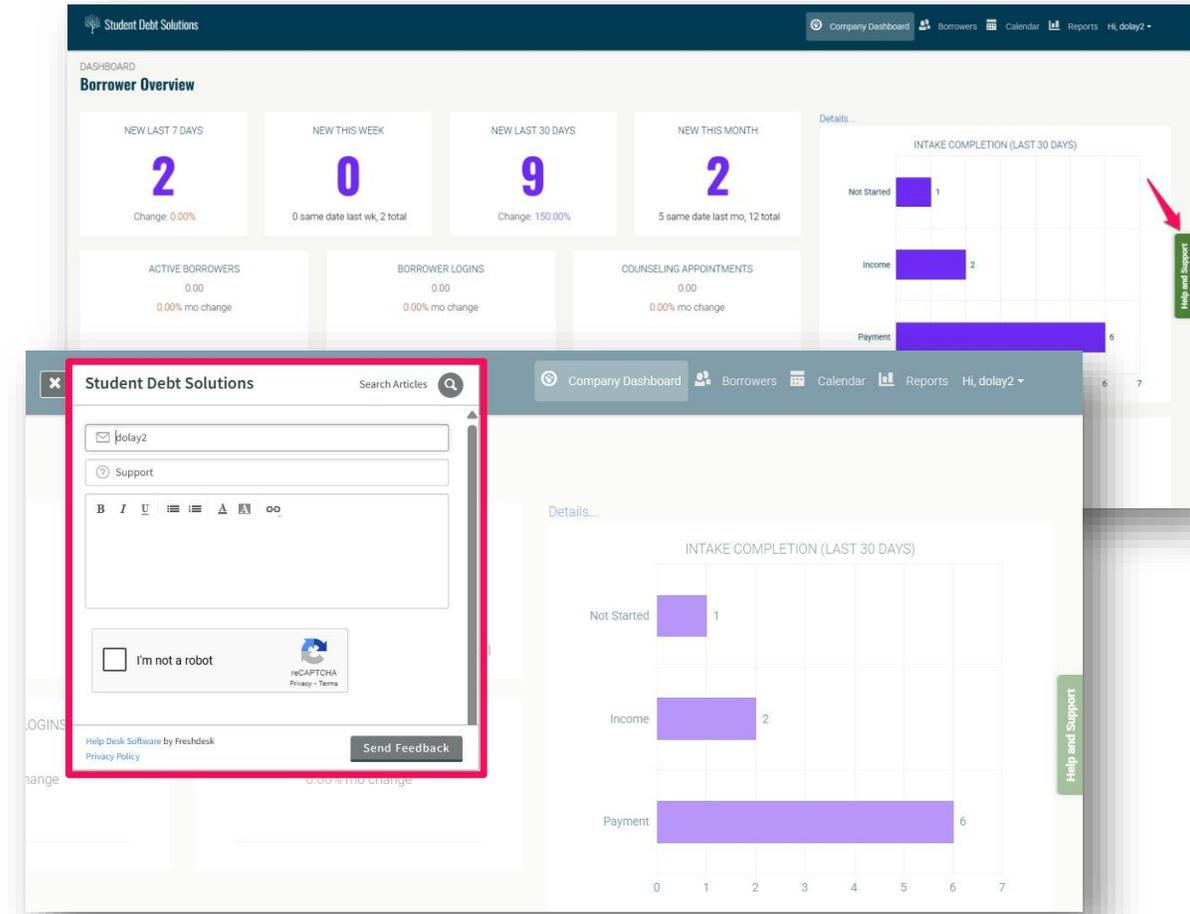


SDS Support: Partner Guide

- Be familiar with the application so you can be aware of what the user workflows look like and can give informed guidance to the clients/borrowers before or during their SDS sessions.
- Be specific and clear when you discuss how Student Debt Solutions works and what it offers to the borrower
- Know your agency/company/firm's channels, product offerings and prices

SDS Support: Contacting SDS Support

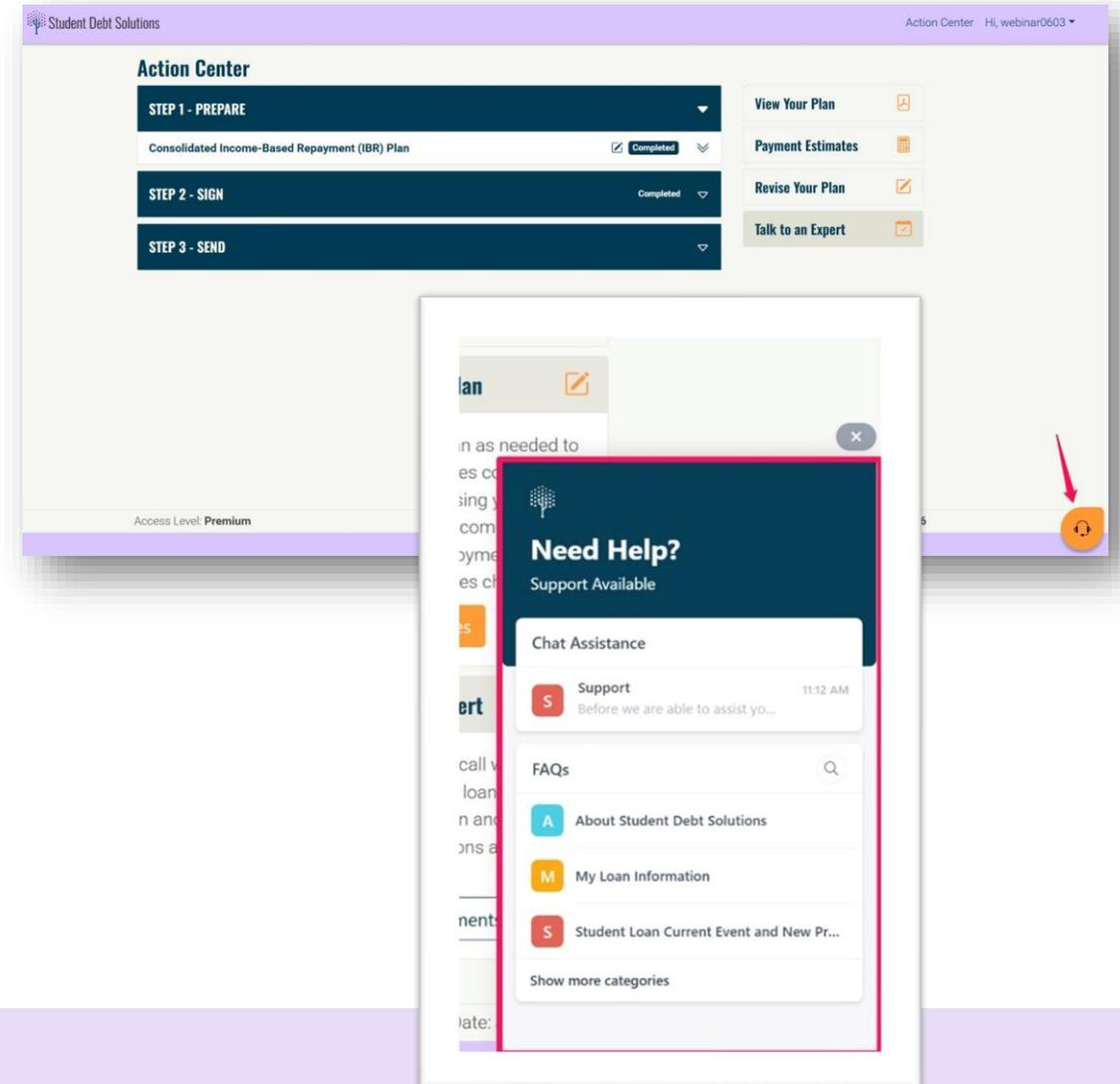
- To contact our staff in the event you need to escalate a customer concern please utilize our ticket system. This system helps us organize, track and maintain communication for ongoing concerns.
- Ways to create a ticket:
 - Email us at support@myresolvent.com this will automatically create a ticket in the system.
 - Use the Help and Support contact form in the Agency Portal to create a ticket directly from the SDS application.



SDS Support:

Connecting the Borrower to SDS

- Determine whether you are going to involve the client in the ticket conversation or if you will converse on their behalf.
 - Submit on behalf of the client and manage the ticket using the tab in the Agency Portal to submit the ticket.
 - Involve the client in ticket responses by sending an email to support@myresolvent.com and CC the client on the ticket request when it is sent
 - Submit a ticket and specify in the body somewhere the client's email address to request that they are CC'd on all responses.
 - Direct the client to use the in-app chat bot feature to submit a ticket on their own.



Best Practices for Support Requests

- Context Matters!
 - Explain where and how the issue occurred
- A Picture is Worth a Thousand Words.
 - Use screenshots or video screenshare recordings to help describe the issue
- Categorize your Concern
 - Content Questions
 - General Feedback
 - Bug/Error
 - Enhancement/Feature Request- Something not developed but that would be a useful function to add to a form or process.

SDS Standard Operating Procedures

1. Automated Email Notification to customer upon ticket creation
2. Automated Email Notification to Tier 1 Agent on duty
3. Automated Notification of New ticket in Slack dedicated SDS channel
4. Typical First Response Time: 1-2 hours
5. No Customer Response: Follow-up after 2 business days.
6. No Customer Response: Customer Support Ticket closed by default after 4 business days with no response.
7. Resolution Due: 4 business days with exceptions
 - Exceptions placed in Pending status for continued follow up.
 - Exceptions may be due to ongoing conversation with client, Waiting on Customer status, or ongoing collaboration with development.

Pro Tips for Agency Users

- Sign up to receive monthly or weekly reporting on new or active borrowers automatically sent to your email
- Always be able to find your links, active promos, pricing configuration in your Agency Portal's Account settings
- Use support for questions and supply us with feedback! We always want to hear what we are doing right and how we can improve the process for our Partners or Borrowers!

Q & A





Thank You!

For more information:

Student Debt Solutions:

Website: www.myresolvent.com

Partner Inquiries: www.myresolvent.com/partner-with-us

Schedule a Personal Demo: [Schedule Demo](#)

Customer Support: support@myresolvent.com

Video Demo: [SDS Video Demo](#)