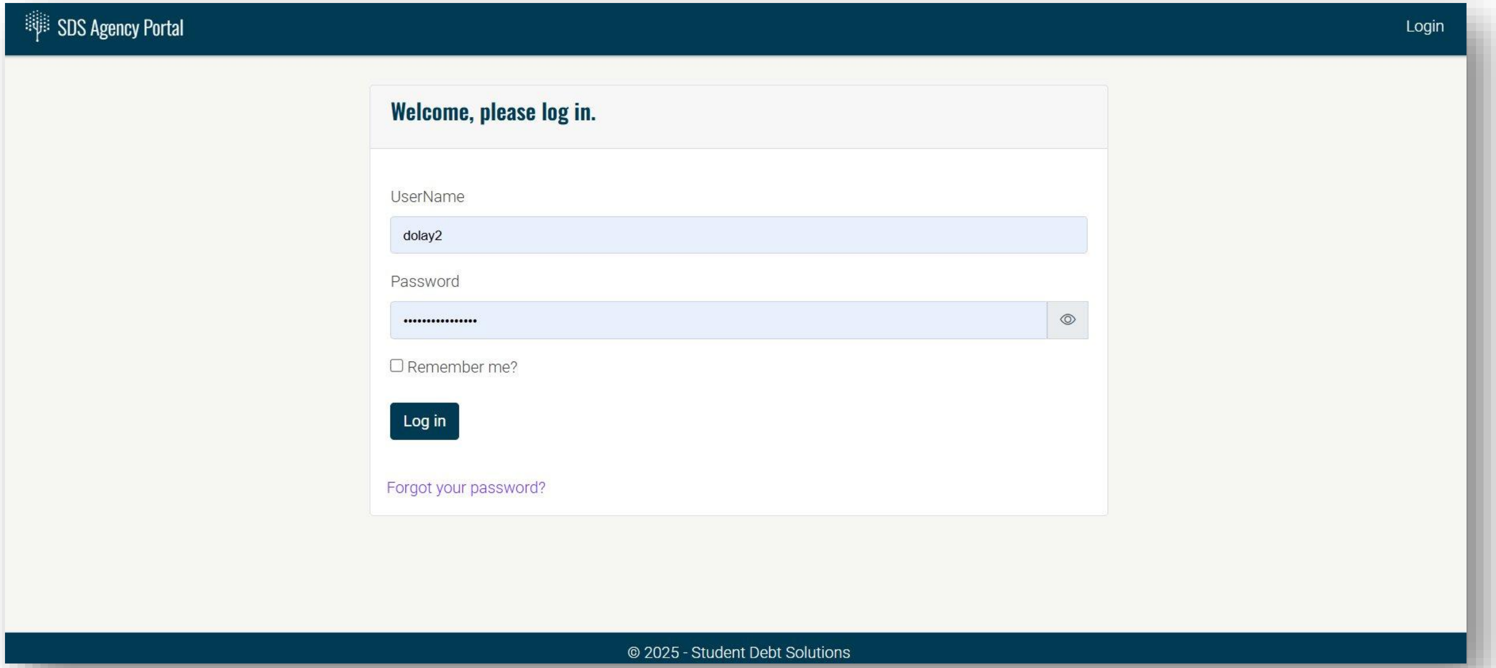
Student
Debt
Solutions

Agency Portal Deep Dive

Webinar Objectives

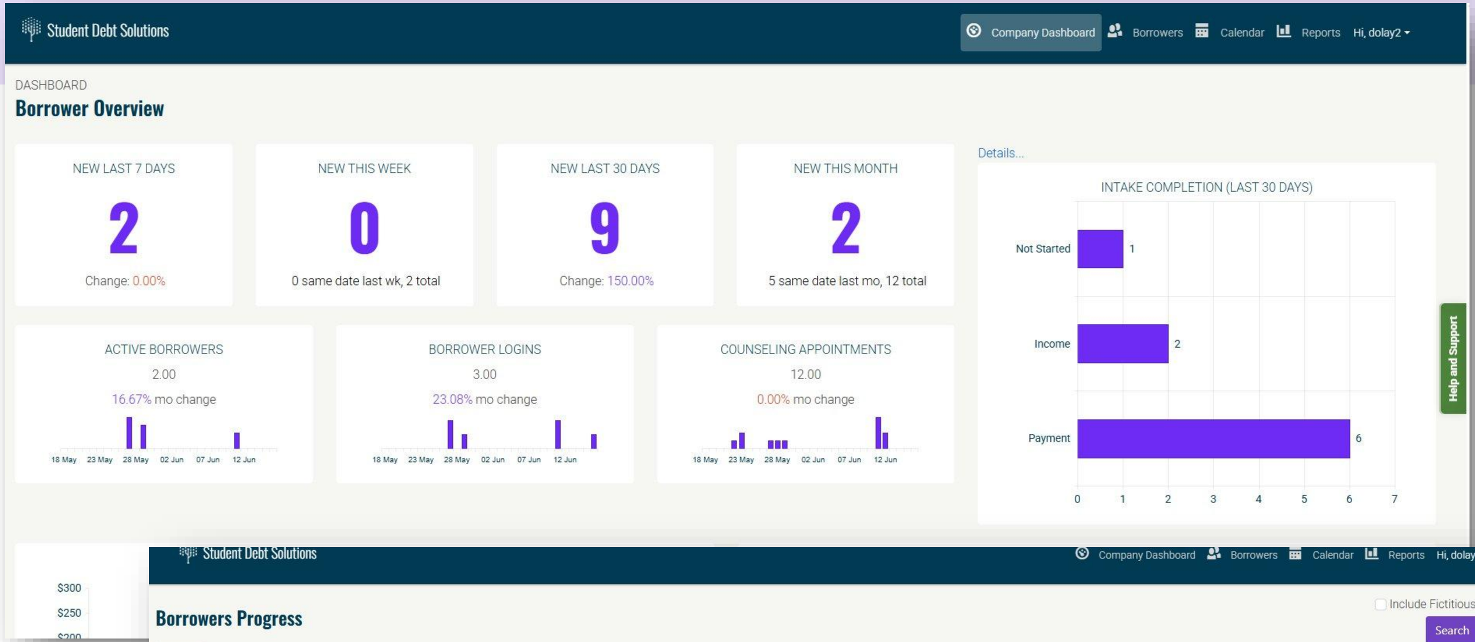
Goals:

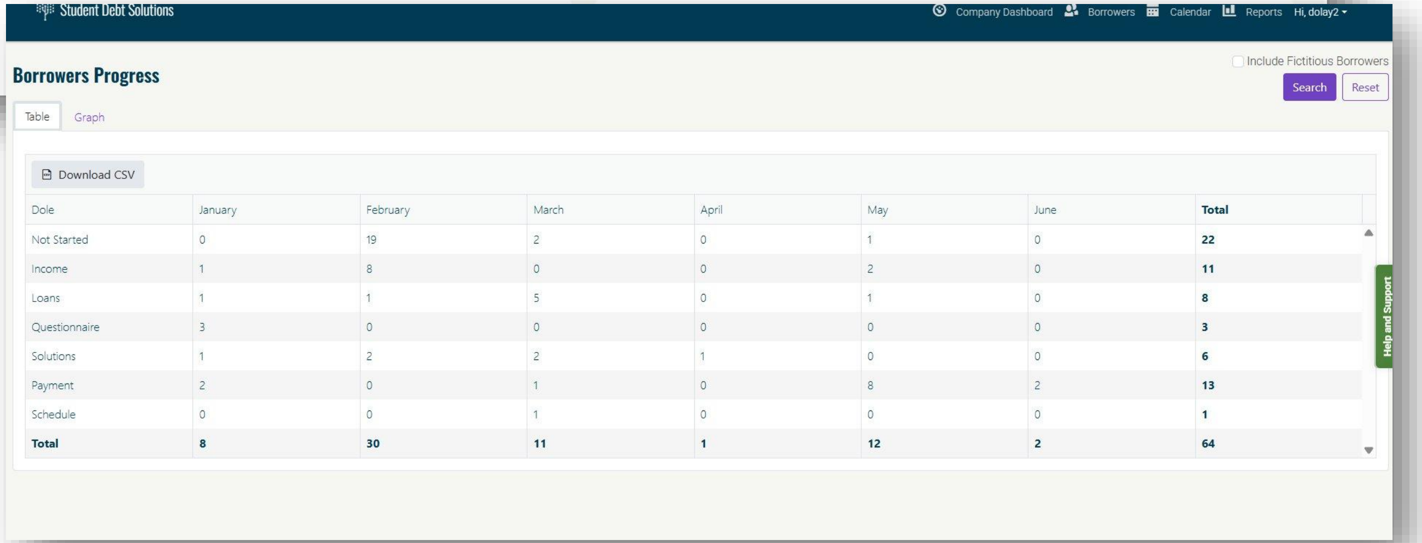
- Take a deep dive into the Agency Portal and discover how to maximize its features for tracking borrower progress, generating reports, and managing client cases efficiently.
- Understanding SDS Support functions and workflows
- Understand best practices for ticket creation for both agencies and borrowers.



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

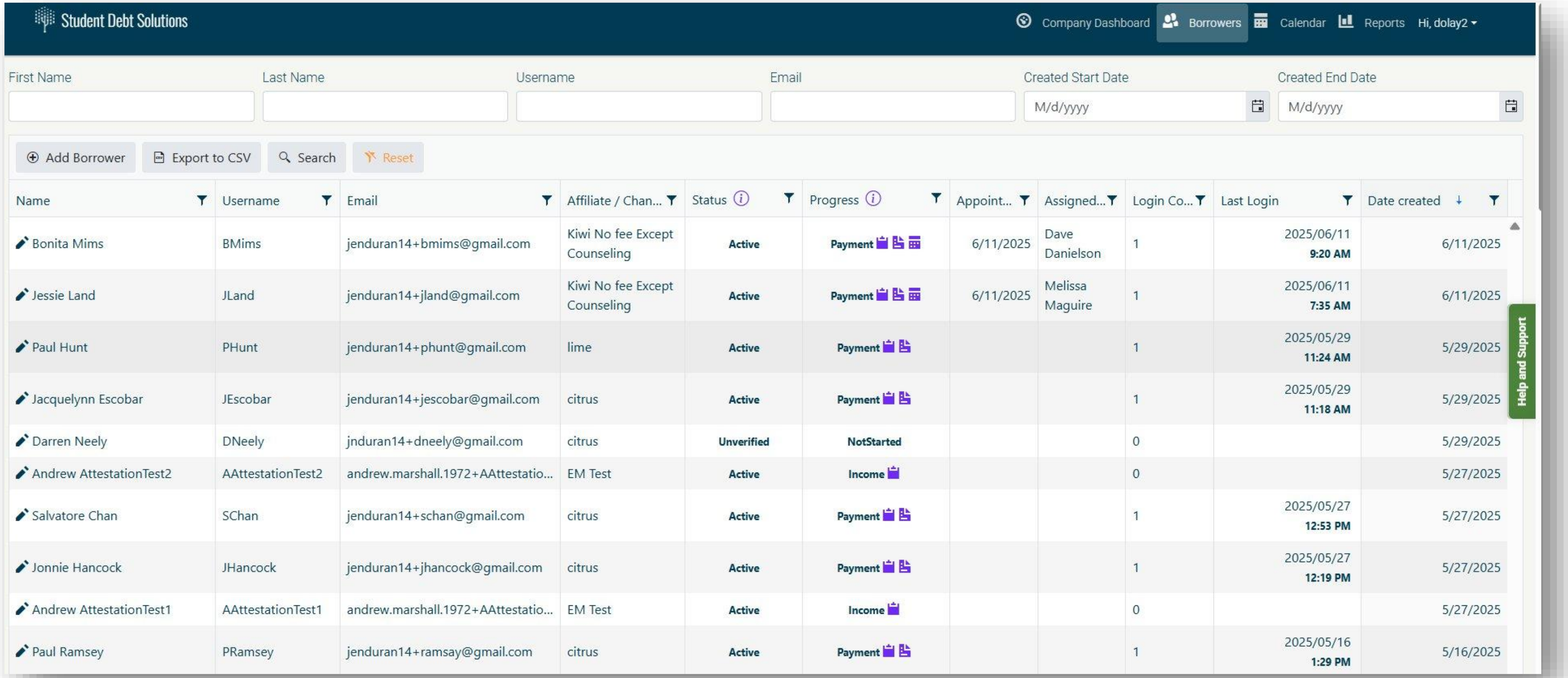




Dole	January	February	March	April	May	June	Total
Not Started	0	19	2	0	1	0	22
Income	1	8	0	0	2	0	11
Loans	1	1	5	0	1	0	8
Questionnaire	3	0	0	0	0	0	3
Solutions	1	2	2	1	0	0	6
Payment	2	0	1	0	8	2	13
Schedule	0	0	1	0	0	0	1
Total	8	30	11	1	12	2	64

Agency Portal:
Borrowers

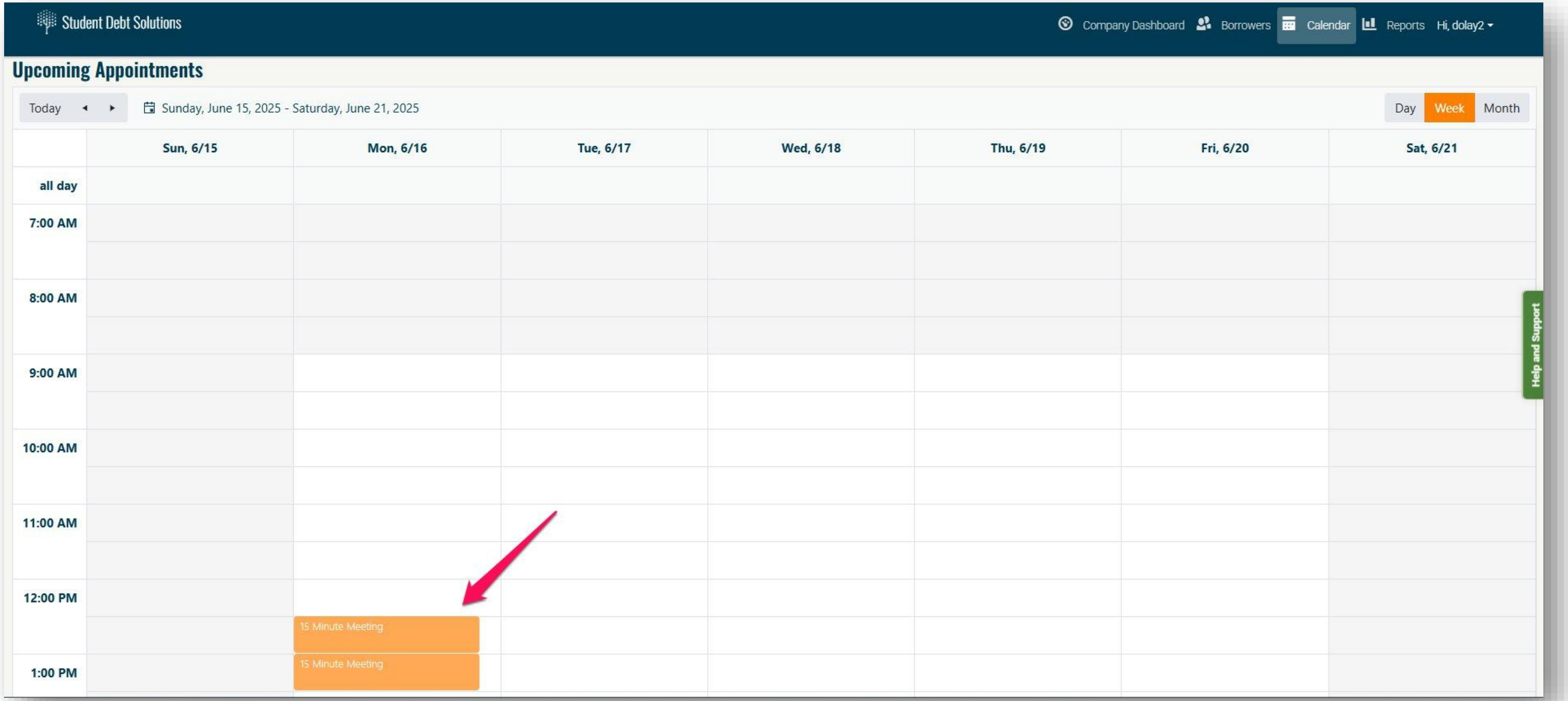
- Search/Filter Borrowers List
- Export Borrowers List to CSV
- Add a New Borrower
  - Expert Mode
  - BK Adversary Analysis
- Borrower Statuses
  - Active/Verified
  - Last Step completed
  - Icon Identifies



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

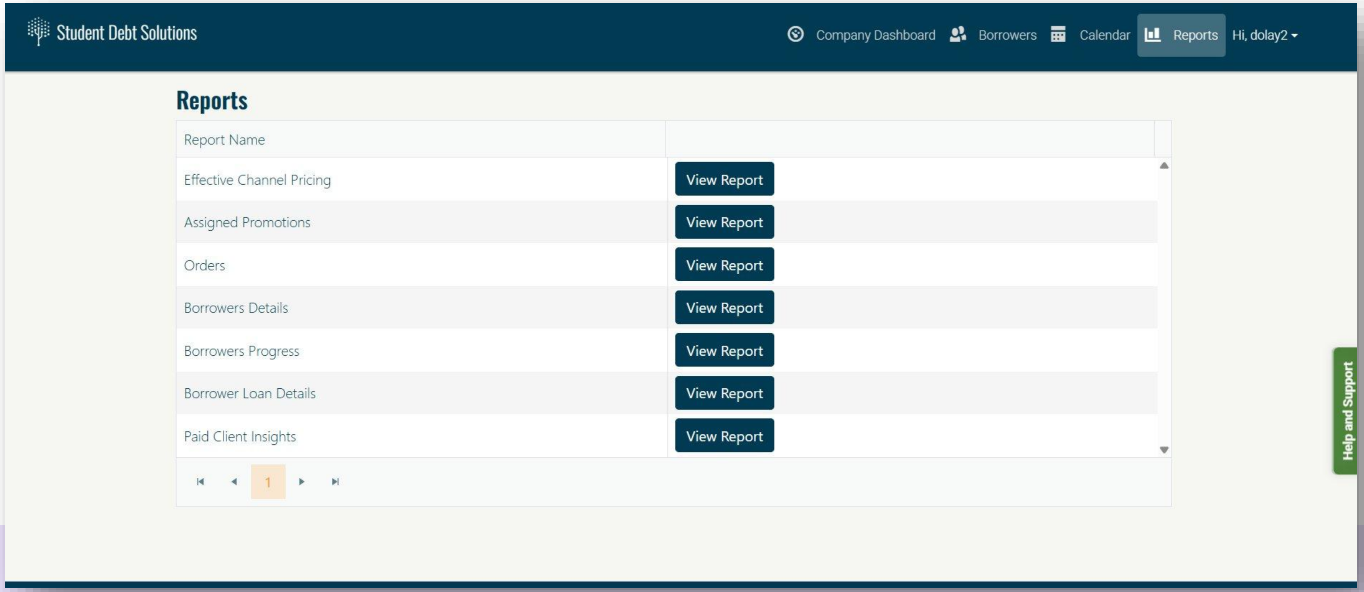
Agency Portal:
Calendar

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



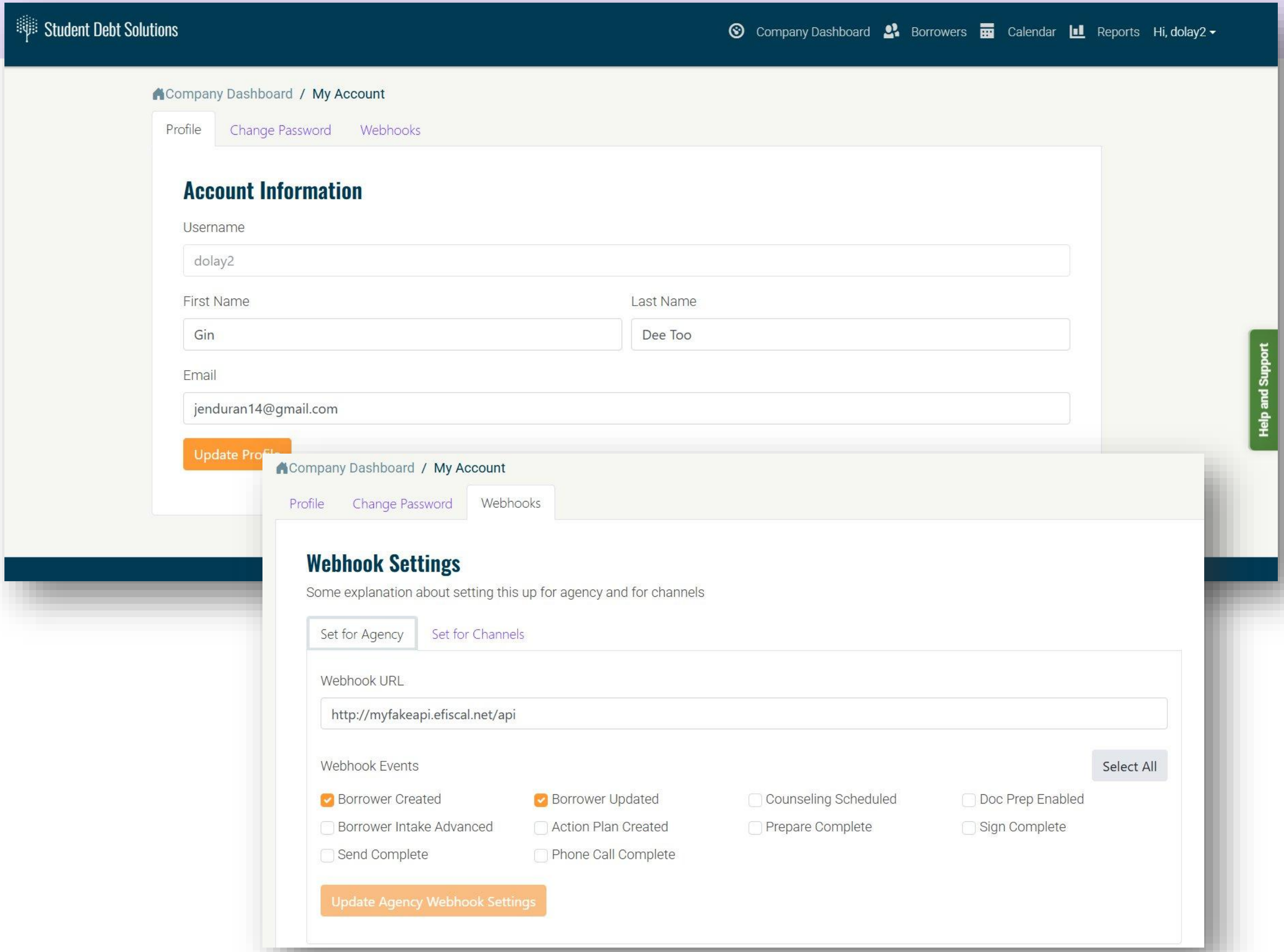
Agency Portal:
Reporting

- 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



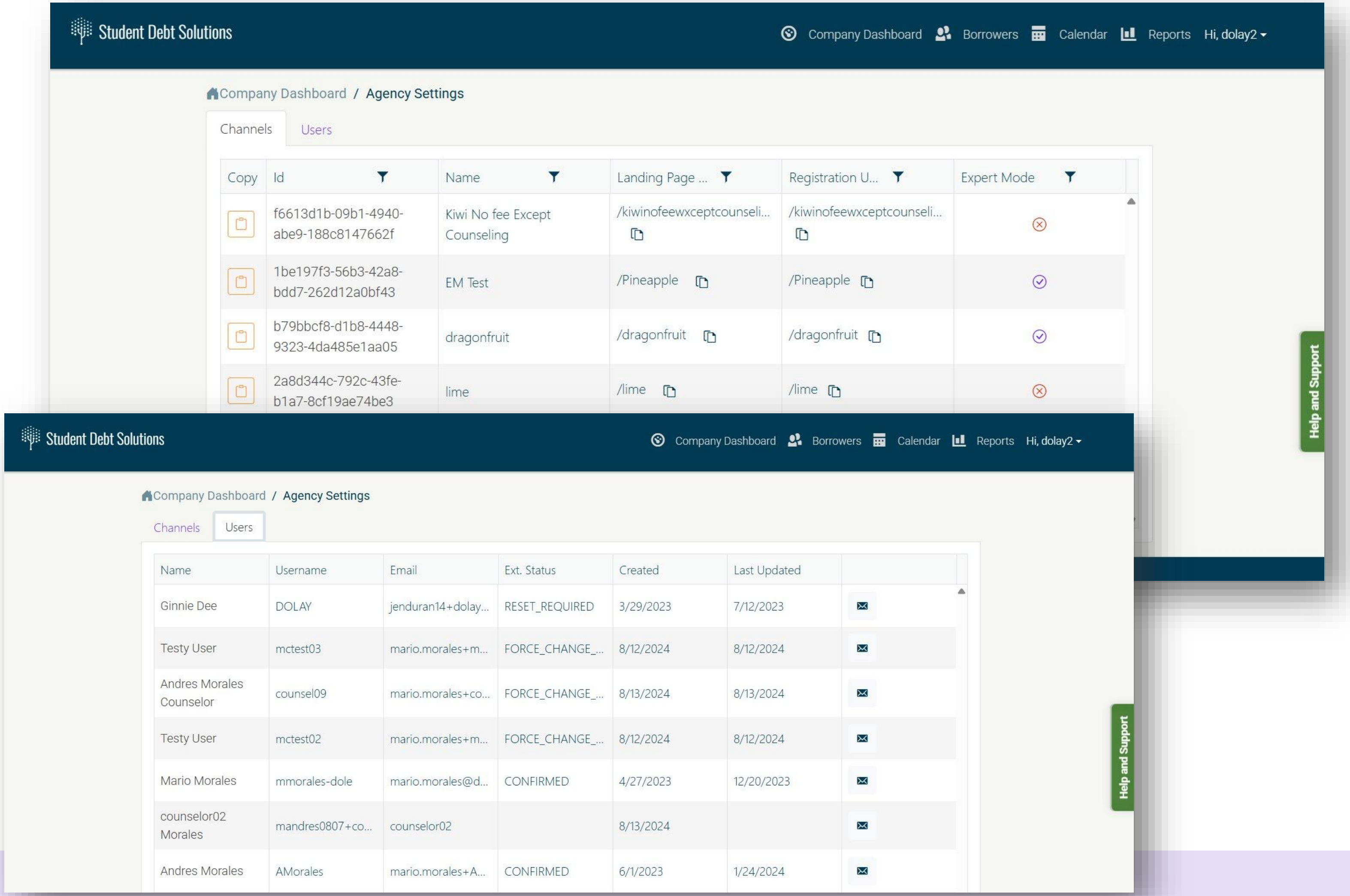
Agency Portal:
My Account

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



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



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:

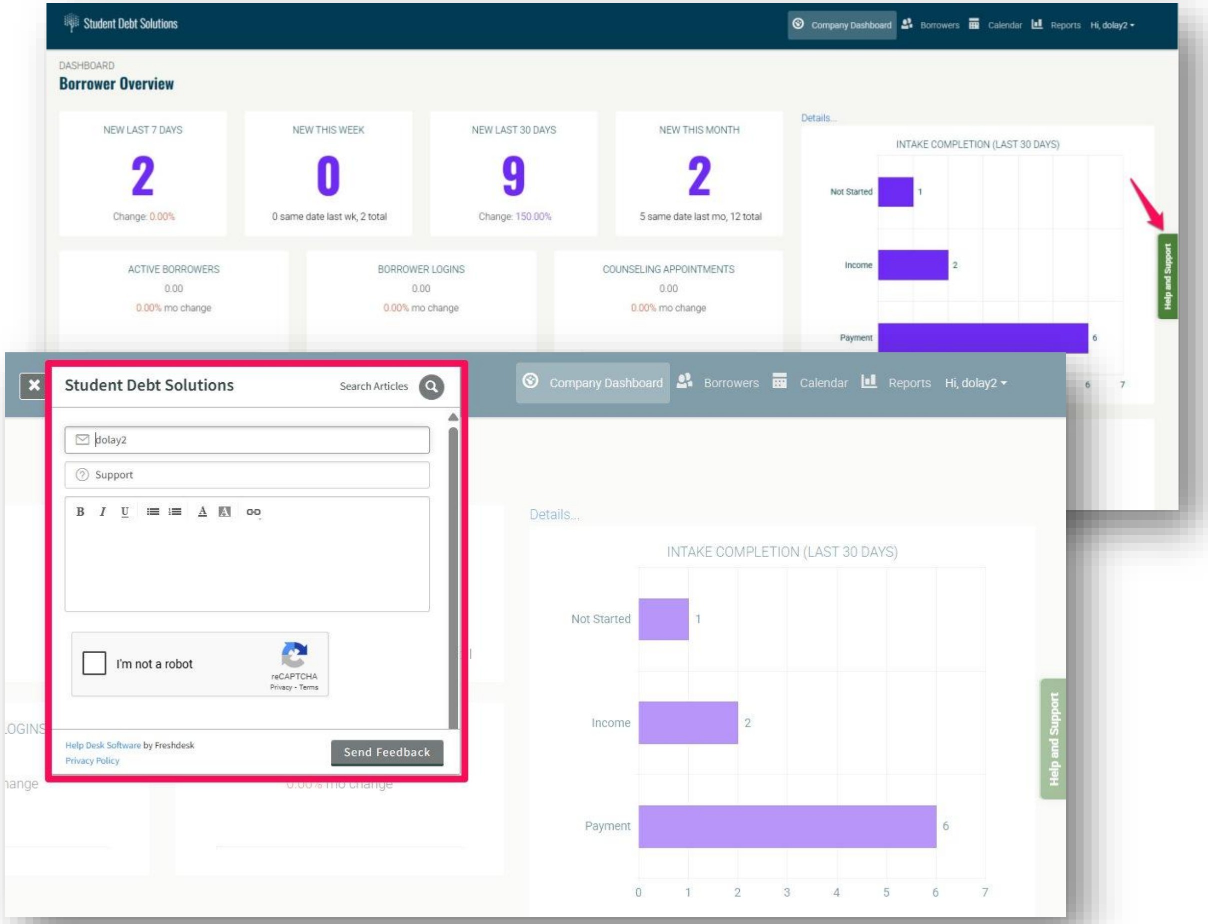
Partner Guide

- 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

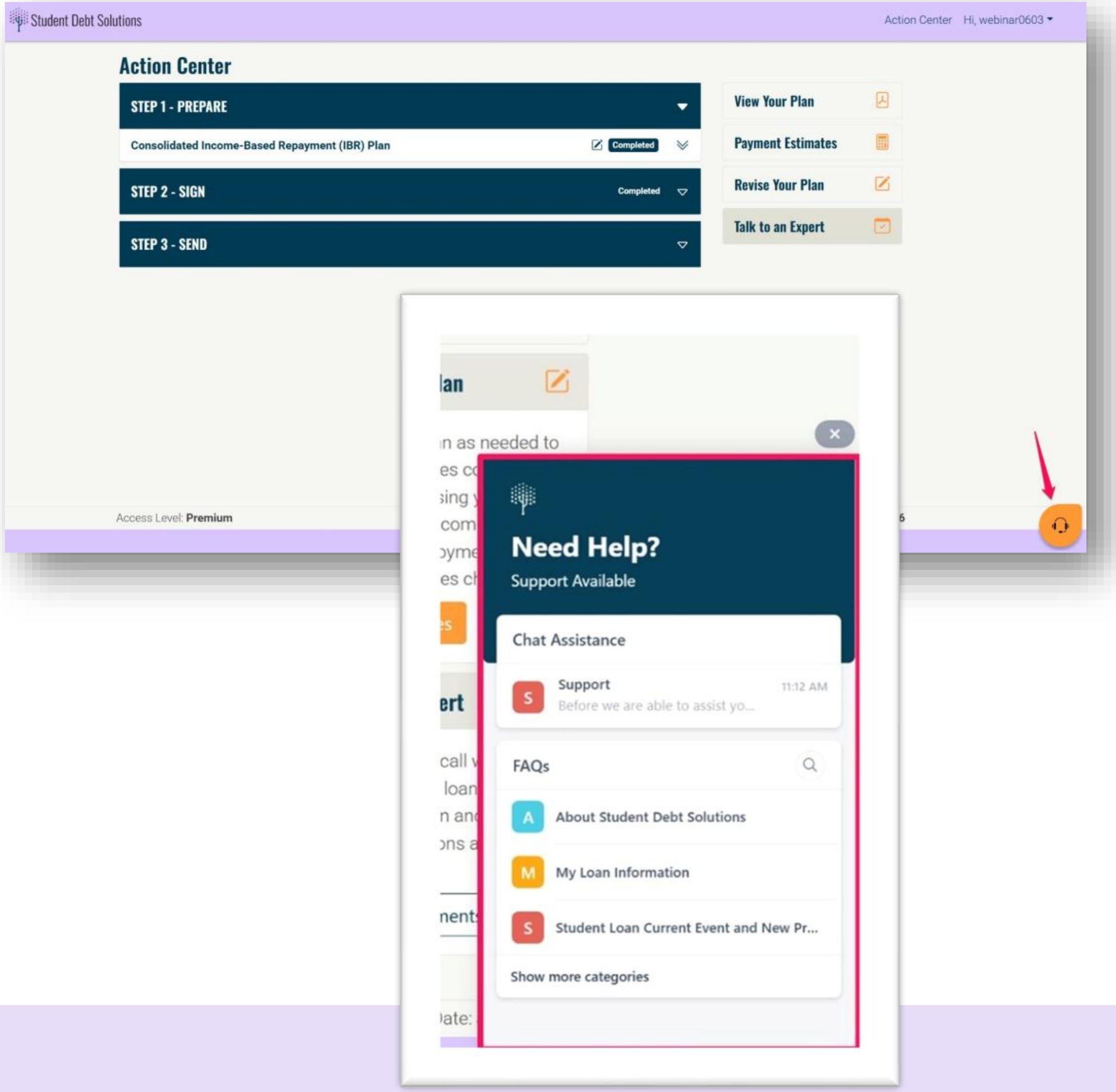
- To contact our staff in the event you need to escalate a customer concern please utilize our ticket system. This system helps us organize, track and maintain communication for ongoing concerns.
- Ways to create a ticket:
  - Email us at support@myresolvent.com this will automatically create a ticket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



SDS Support:

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