



1500+ 5 STAR REVIEWS



UCS ISO Referral Partner Signup Process Guide

A screen recording of the entire signup process can be found here:

[WATCH PROCESS](#)

<https://www.loom.com/share/e51e091f30a14d08a68d7c7044888f11>



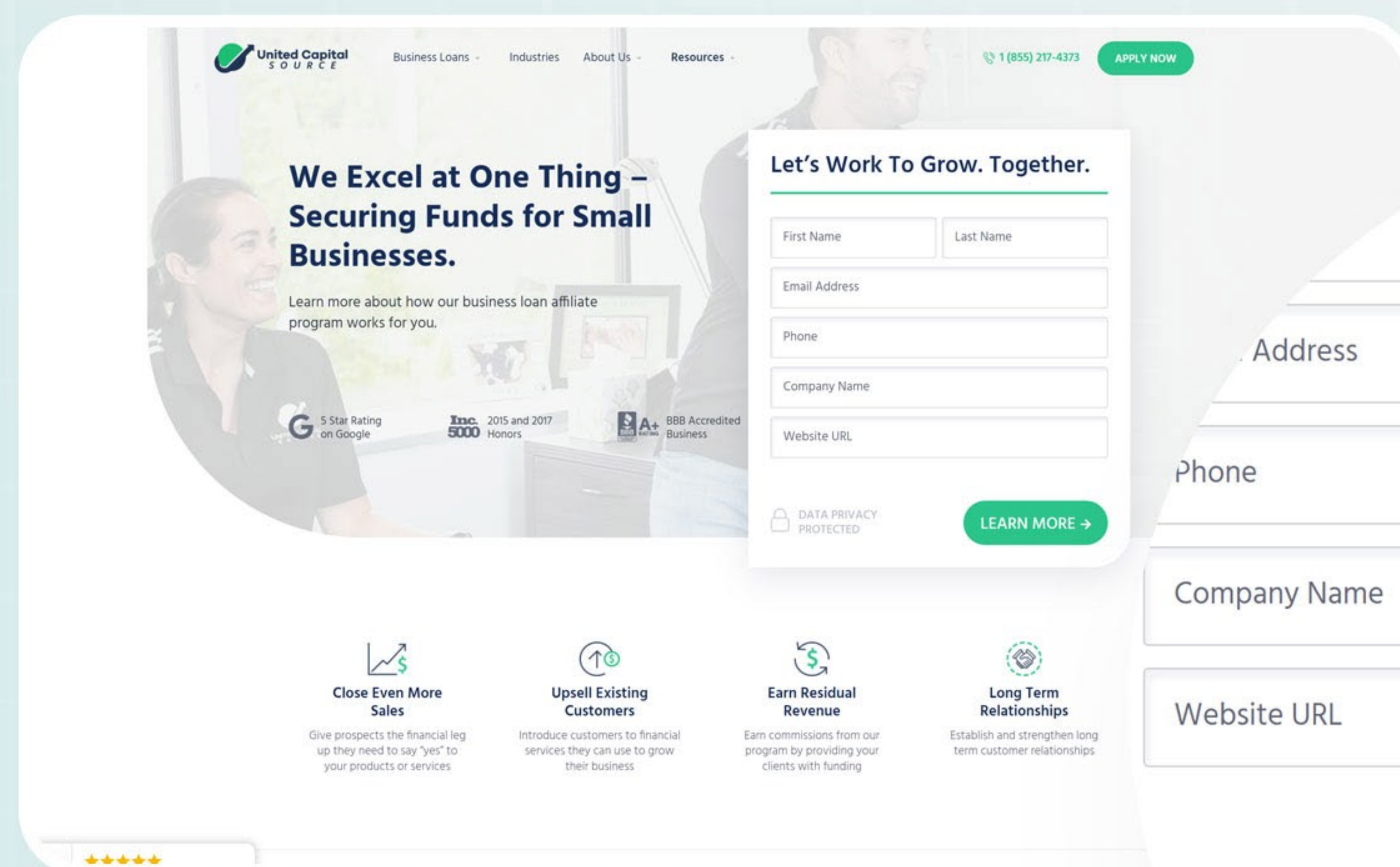
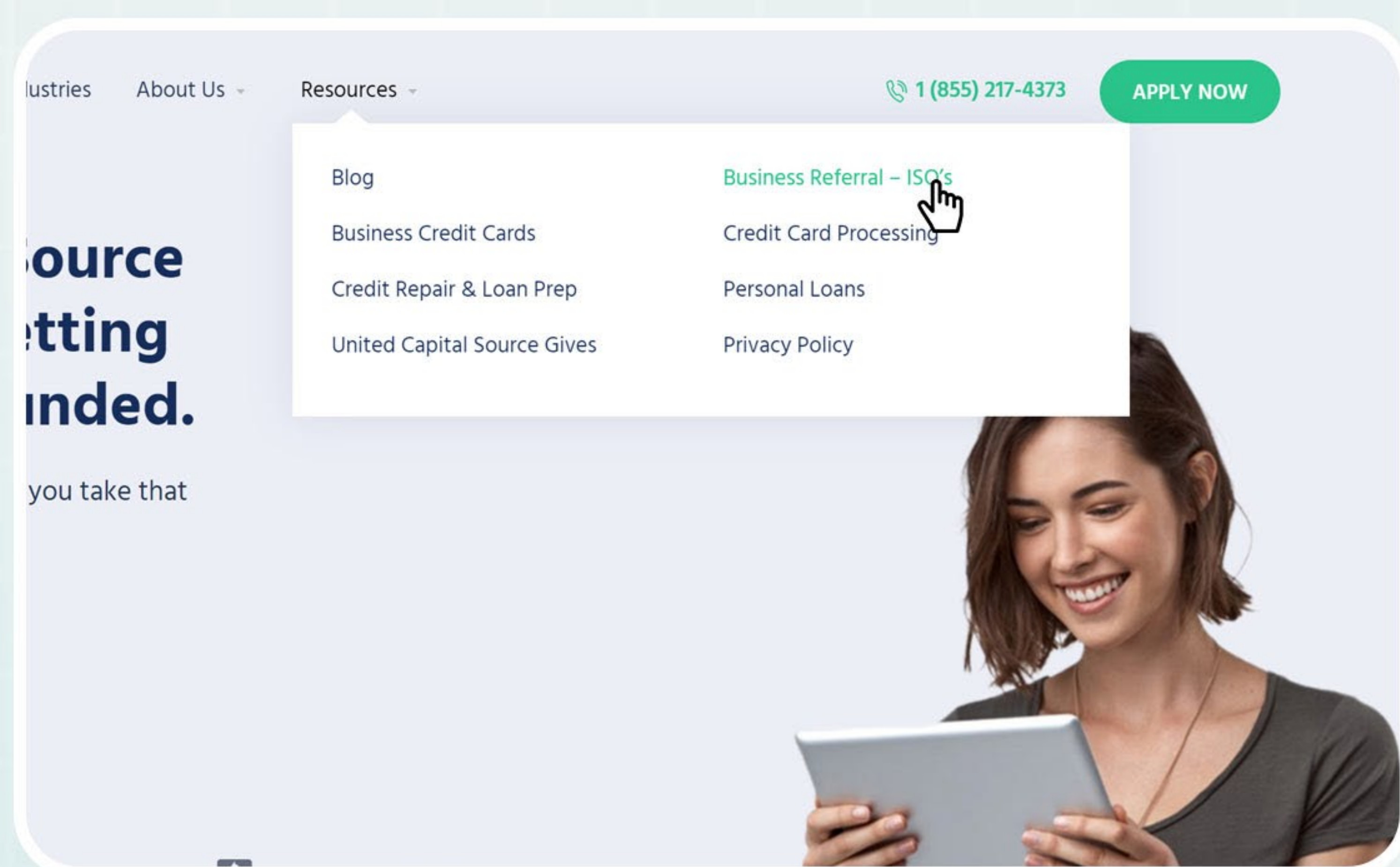


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STEP 1

Visit our referral partner page and fill out the form at:

<https://www.unitedcapitalsource.com/iso>

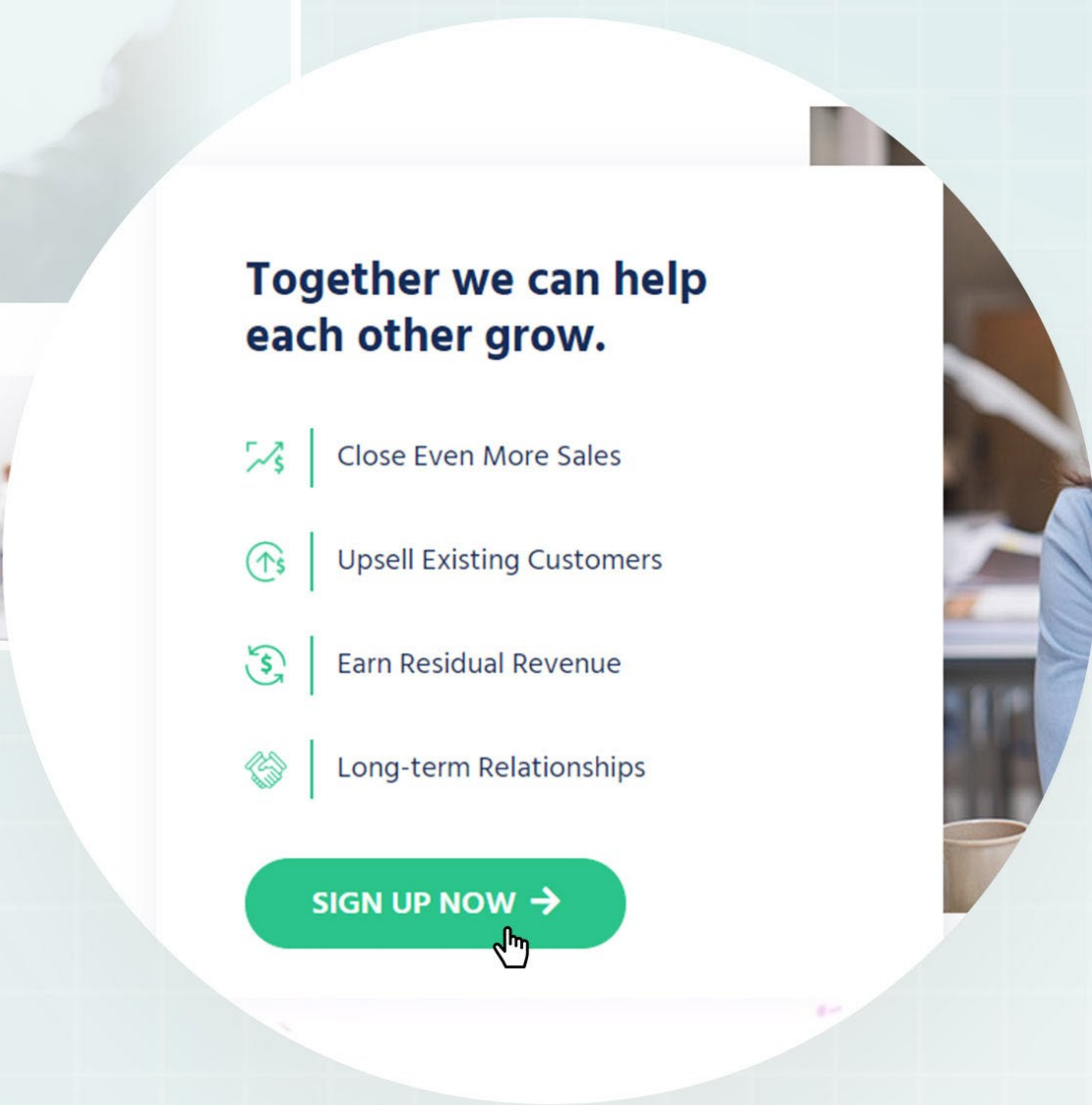
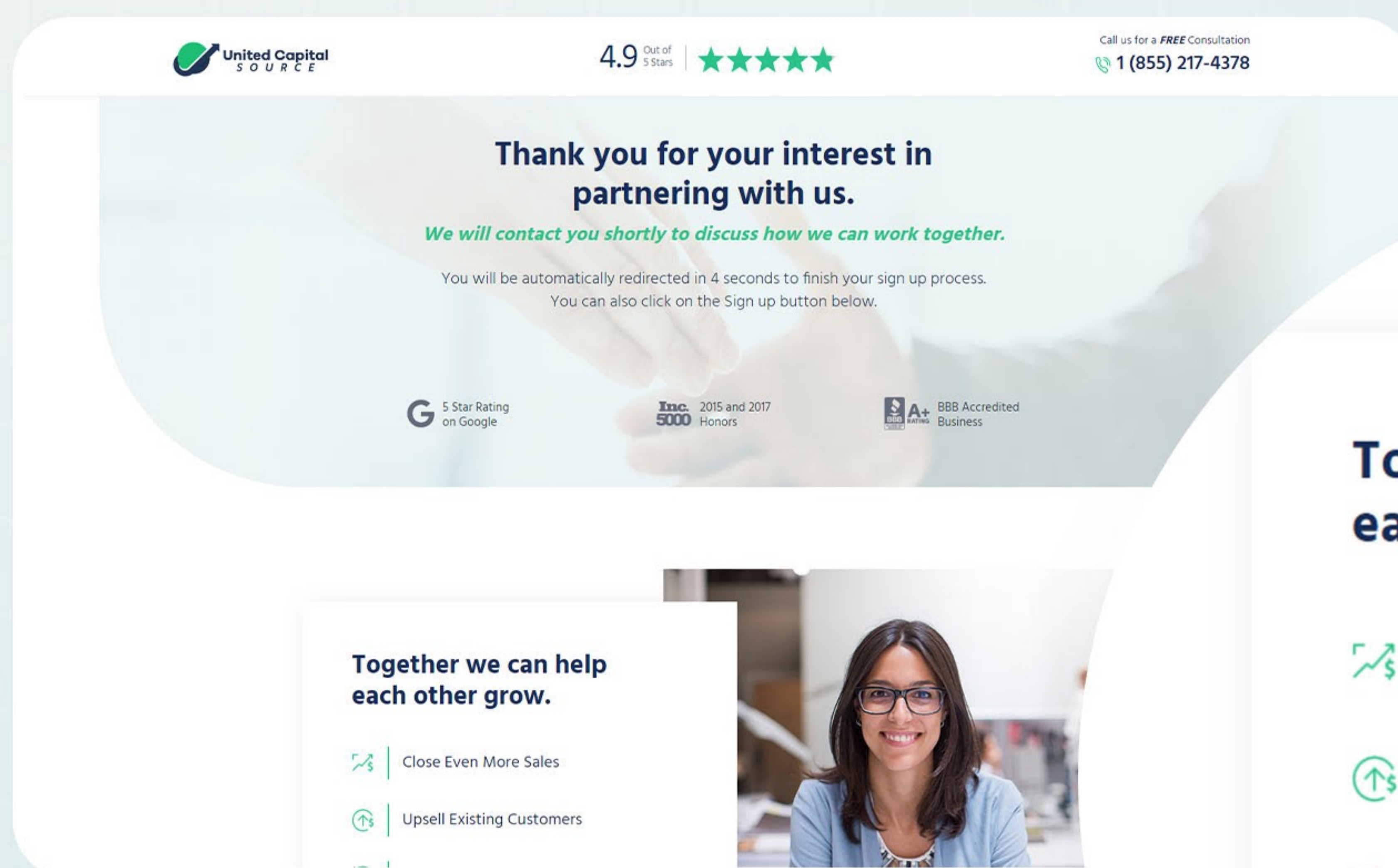




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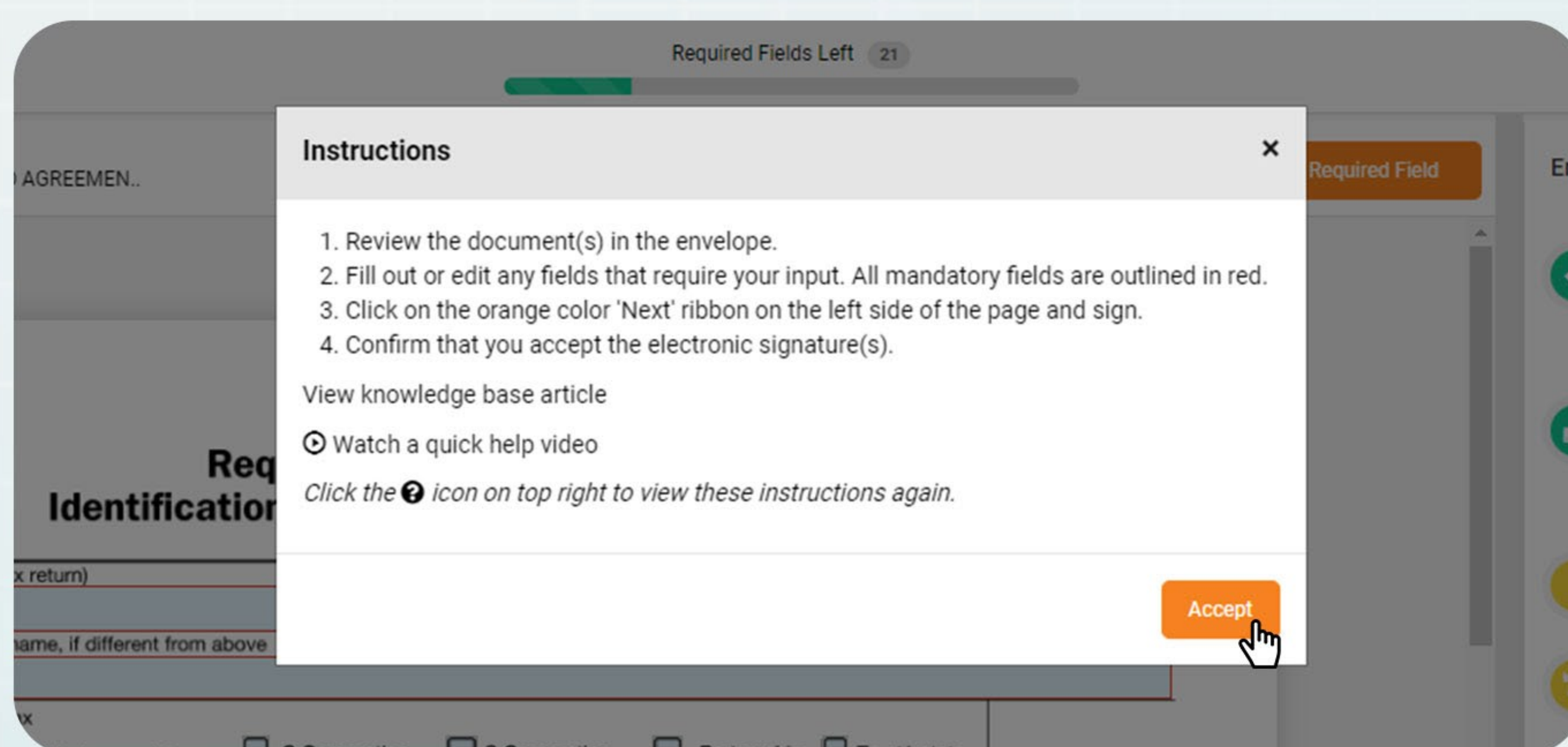
STEP 2

You'll then be redirected to the thank you page; scroll down and click the "**SIGN UP NOW**" button.

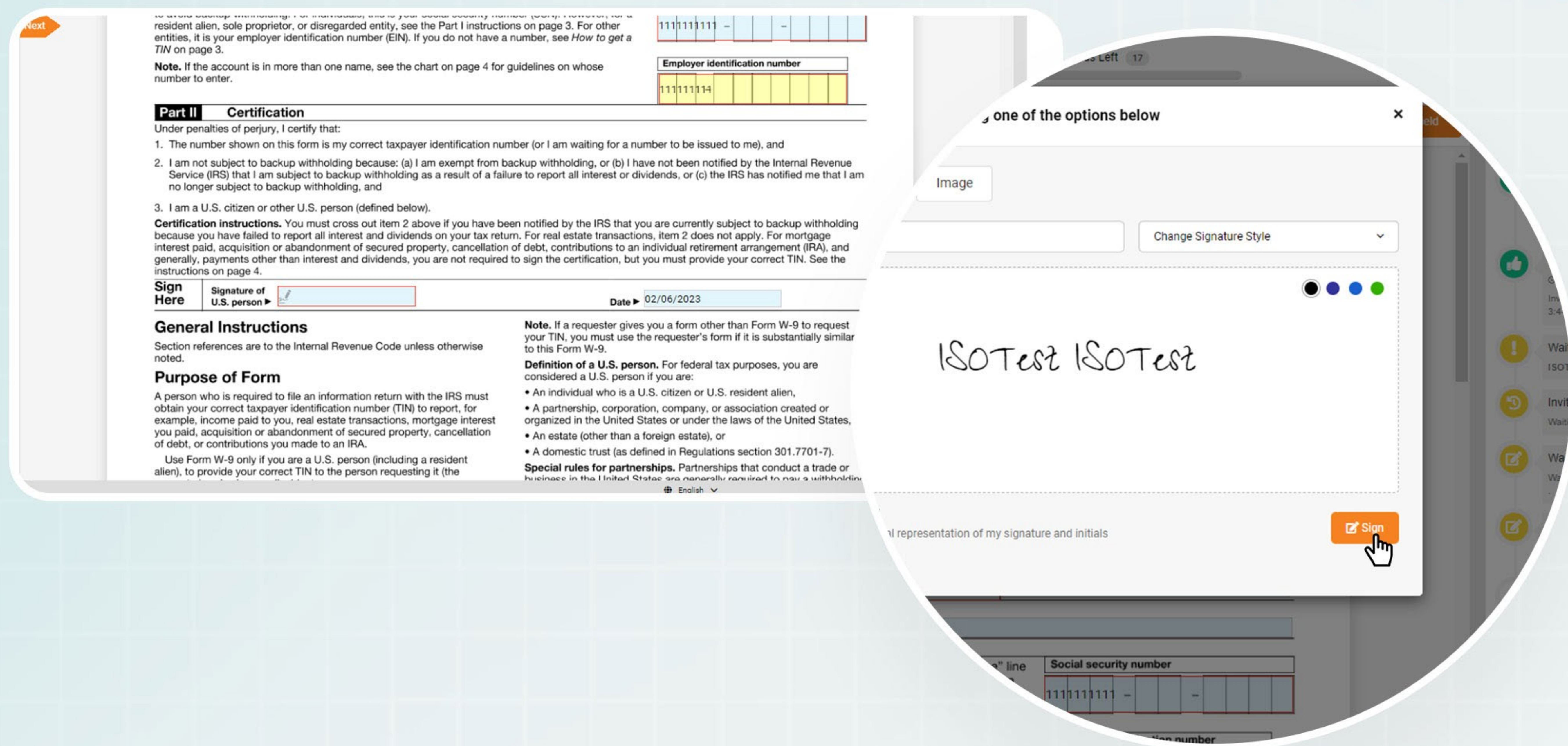


STEP 3

You'll then be redirected to the W-9 Form. Click the "**Accept**" button on the Instructions Pop-up, choose your entity type, and fill out all the required fields of the W-9.



When all required fields are completed, click the "**Signature of U.S. Person**" field and click the "**Sign**" button on the Pop-up.





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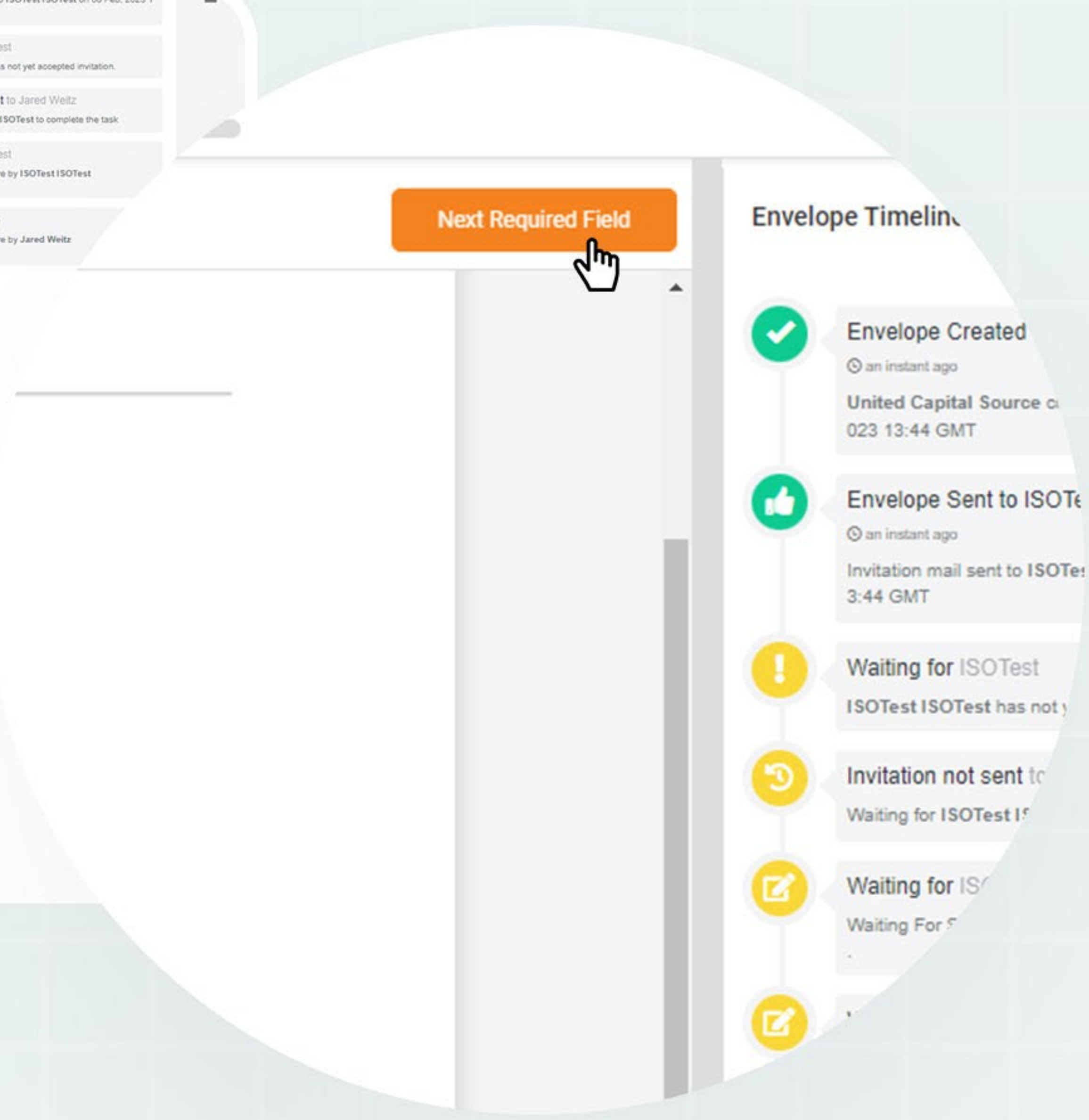
STEP 4

You will then be redirected to the ACH Authorization Form, where you can fill out your banking information and **upload a copy of a voided check.**

Once completed, go to the top right of the form and click the **"Next Required Field"** button.

The screenshot shows the ACH Authorization Form interface. The form includes fields for Applicant Name, Office Name, Address, Bank Name, Bank Contact Name, Bank Contact Phone, Account#, and Routing#. A 'Next Required Field' button is highlighted in orange at the top right of the form area. To the right of the form is an 'Envelope Timeline' section with a list of events: 'Envelope Created by United Capital Source', 'Envelope Sent to ISOTest', 'Waiting for ISOTest', 'Invitation not sent to Jared Weitz', 'Waiting for ISOTest', 'Waiting For Signature by ISOTest ISOTest', and 'Waiting for Jared'. A 'More Actions' dropdown menu is visible in the top right corner.

This screenshot shows the same ACH Authorization Form, but with a focus on the bottom section. A blue button labeled 'ATTACH VOID CHECK HERE!!!' is highlighted with a hand cursor. The 'Next Required Field' button is also visible and highlighted in orange. The 'Envelope Timeline' and 'More Actions' menu are also present.

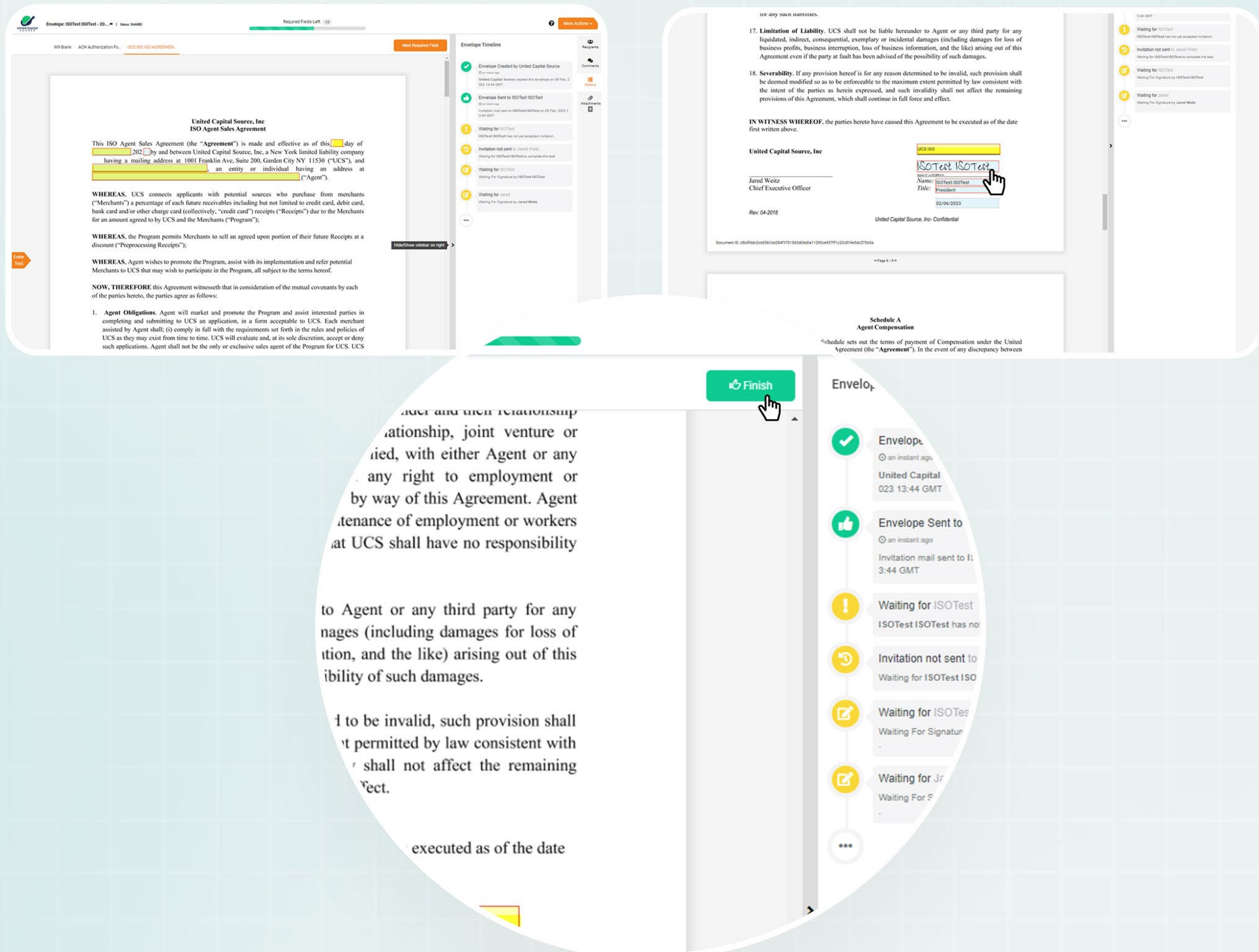




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STEP 5

Next, you will be redirected to the ISO Agent Sales Agreement. Fill out all required fields and click to sign. Once the form is complete, go to the top right of the form and click the "Next Required Field" button, which will then turn into a green "Finish" button. Click the "Finish" button.



✔ STEP 6

Congratulations, you're done signing up! You'll receive an email with a link to our ISO Submission Portal, where you'll be given your ISO # and Portal Submission information to submit your files!

Please note that for any submission, we'll ask you for your signed merchant application, 3 months' business bank statements and the portal application with all required fields completed.

