

From application to your first deal

How a business becomes a Pulse partner in Pulse Deals, and exactly what happens on its own — from approval to your first protected, quoted deal.

Part 1 Getting your partner account set up

Six steps from application to your first registered deal. One approval builds everything you need across the Pulse suite, and one sign-in opens all of it.

1 Apply

At the partner portal choose **Become a partner**. Tell us your company, contact and territory, how you will partner (referral, reseller or tech advisor) and which Pulse services you want. Entity, tax ID, address and phone are required; the optional details prefill your paperwork.

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2 Set your password

A welcome email arrives straight away with a sign-in link, valid for seven days. Use it to set your password and open the **Onboarding** checklist. Your tax ID is encrypted and only ever shown as its last four digits.

WELCOME EMAIL

3 Sign your partner packet

On **Onboarding**, click **Review & sign**. The packet opens inside the portal with your application details already filled in. Payout and tax-form details are entered only inside the secure signing session, never stored in the portal.

E-SIGNED IN THE PORTAL

4 Get approved and tiered

Pulse reviews your application, sets your starting tier and countersigns your packet. You get an email when the documents are fully executed, with your copies available from the e-signature completion email.

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5 Everything is built for you

Approval creates your billing account, your Pulse sign-in and product access for the services you chose, and your workspaces. Payment processing and text-to-pay go through a separate merchant boarding step with our team.

ONE APPROVAL

6 Accept your invite and go

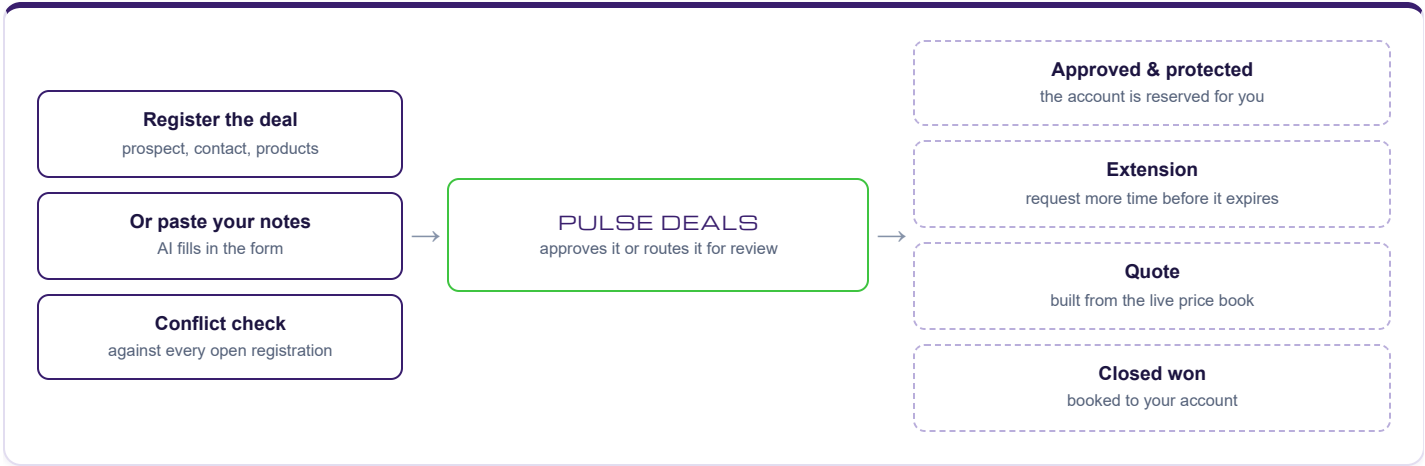
Once every account is ready, Pulse sends your invite: one sign-in for every Pulse product you resell. Open them from **Products**, then register your first deal under **My deals**.

ONE SIGN-IN

Part 2 Where every deal goes

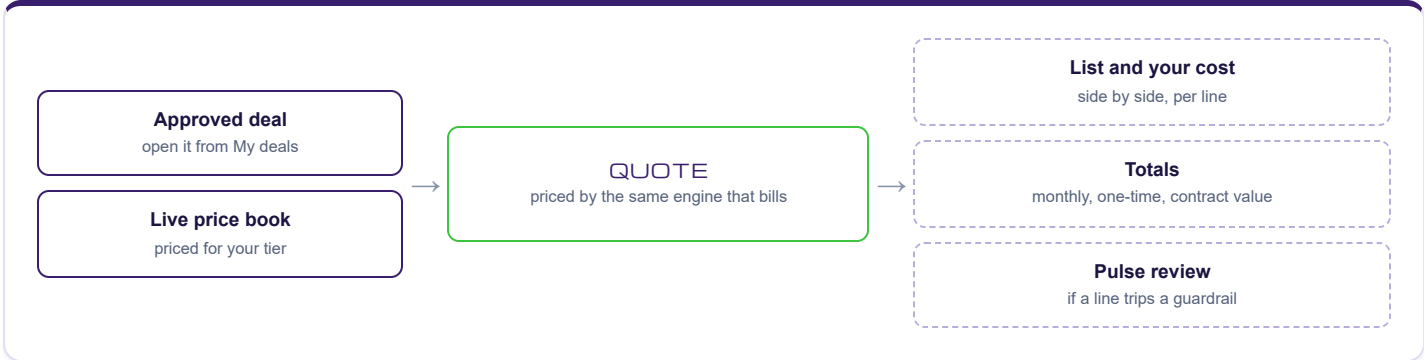
A registered deal follows one path: checked for conflicts, protected while you work it, quoted from the live price book, and closed.

FROM REGISTRATION TO CLOSE



What the picture shows: every registration is checked against the other open registrations so two partners never chase the same account. Clean deals can be approved automatically; anything else goes to Pulse channel review, and you are emailed with the decision either way. An approved deal is protected for a window set by your tier, and you can request an extension from the deal before it runs out.

QUOTING AN APPROVED DEAL



What the picture shows: the quote builder pulls every Pulse product from the live catalog already priced for your tier, so each line shows the list price next to what it costs you. Add a term and the quote shows monthly, one-time and total contract value. Nothing is priced from a spreadsheet, so your quote, the customer's invoice and your margin all come from the same numbers.

Part 3 How partners earn

Pulse partners are paid by margin. There is no separate claim to file and no payout request to chase.

BUY RATE	Every Pulse product has a list price. Your buy rate is that list price less your tier discount. Sell at or above your buy rate and the spread is yours. Your discount is in your agreement and on every line of the price book.
CARD PROCESSING WORKS DIFFERENTLY	There is no list price to mark up on payment processing, so it is paid on the terms in your partner agreement instead of by margin.
TIERS MOVE ON THEIR OWN	Your tier is reviewed every month against billed revenue. One qualifying month schedules a promotion; two short months in a row schedule a demotion. Changes take effect on the first of the next month and you are emailed first.

TIER IS MORE THAN PRICE

Your tier also sets how long an approved deal is protected, and some library collateral opens only at higher tiers.

SEE IT IN THE PORTAL

Commissions lists anything that accrues and **Statements** gives you a monthly statement. Every list in the portal exports to CSV.

Part 4 Your portal, beyond deals

Pulse Deals is your front door to the whole program. Here is what else is in it.

PRICE BOOK

Always the live version, so quotes and payouts stay in step. It unlocks as soon as your packet is signed and your partner agreement is accepted.

TRAINING & CERTIFICATION

Short courses for every Pulse product, each ending in a quiz. Pass it to earn a certification. Marketing contacts complete **Pulse Brand Training** before using Pulse brand assets.

RESOURCES & CO-BRAND

The library holds sell sheets, getting-started guides and customer guides for every product. Upload your logo once and generate co-branded PDFs; new co-branded material is approved by Pulse before it goes out.

YOUR TEAM

Partner admins invite teammates from **Security**. Everyone signs in with their own email, and two-factor authentication is one QR code away.

PREMIUM

Leads routed from Pulse, marketing development funds, the partner community and a public directory listing come with the Premium plan.

HELP WHEN YOU NEED IT

Ask **PIP**, the Pulse assistant, from any page, read **Help**, or open a ticket under **Support**.

BEFORE YOUR FIRST DEAL

- | | |
|--|---|
| ☐ Application submitted with business details | ☐ Password set from the welcome email |
| ☐ Partner packet signed in the portal | ☐ Partner agreement accepted |
| ☐ Invite accepted; product tiles open | ☐ Two-factor turned on under Security |
| ☐ Logo uploaded under Co-brand | ☐ First certification earned |
| ☐ Brand training done before any co-marketing | ☐ Price book opens: onboarding is complete |

THE SHORT VERSION

Apply, sign your packet in the portal, and let one approval build your accounts. Accept your invite and you have one sign-in for every Pulse product you sell. Register a deal to protect it, quote it from the live price book, and keep the spread above your buy rate.

Questions? partners@pulsetechnologies.ai · (850) 80-PULSE · portal.pulsetechnologies.ai