LULU STEP-BY-STEP GUIDE

Hire an onboarding partner and pay safely

For store owners and staff who manage the plan: choose an onboarding partner, message them, approve an offer, pay through the platform, and follow the order through delivery, revisions and acceptance — with your money held safely until you accept the work.

For: Store owners · About 9 minutes · 9 steps · Updated November 20, 2026

Before you start You need the "Manage plan and billing" permission on your staff account to send messages that involve money, approve or decline offers, and buy a package. Any staff member can read the conversation and view offers. Onboarding partners are optional — you can always set up your own store instead.

Steps at a glance

1. Choose how you want to set up your store
2. Browse partners and their packages
3. Message a partner
4. Receive and approve an offer
5. Pay for the package or offer
6. Follow the order page
7. Request a revision if the delivery isn't right
8. Approve or decline a deadline extension
9. Accept, dispute, or cancel

STEP 1

Choose how you want to set up your store

The first time you open your admin home after your store's sign-up payment settles, a window asks "Set up your store yourself, or hire an onboarding partner?". Click "Choose a partner" to go straight to the onboarding partner directory, or "I'll do it myself" to close it and set things up on your own. Whichever you pick is remembered — the window only appears once. Closing it with Esc or the X asks again next time you open the home page.

- This choice has no effect on your billing or your store's features. You can still browse and hire a partner later from Home or from the partner's own page.
- Only staff with "Manage plan and billing" see this window.

STEP 2

Browse partners and their packages

On a partner's page you'll see their rating, response time, and packages. A package with a fixed price shows a "Buy this package" button when on-platform buying is turned on for your store; otherwise you'll see "Request a quote" further down the page. If you'd rather agree on scope and price directly with the partner first, message them instead — they can send you a custom offer.

- "View your order" appears instead of "Buy this package" if you already have an order open for that package.
- A grey note under a package (for example "Buying on-platform isn't turned on for this store yet") explains why buying isn't available right now.

STEP 3

Message a partner

Click "Message" on a partner's page, or open Onboarding partners → Messages (or "Messages & offers" on a request under My requests), to start a conversation. The partner answers in the same conversation and you are emailed when they write — you don't need to wait for an email reply. Anyone on your team can read the conversation; only staff with "Manage plan and billing" can send messages, accept or decline offers, or pay. Attachments are links only (up to 5 per message) — there's no file upload. Every order event also appears here as part of the same activity feed, so this is where you'll see updates even after you've bought something.

- Never pay a partner directly through a link, bank transfer or wallet mentioned in a message. Payments made outside the platform have no escrow or refund protection — you'll see this warning if a message looks like it's asking for one.

STEP 4

Receive and approve an offer

A partner can send you a custom offer instead of (or in addition to) a fixed package: a price (sometimes discounted from a package's price), a delivery time in days, and a number of included revisions. The offer appears in your conversation with the partner. Review the price, discount, delivery time and revisions before accepting — an offer expires after the date shown, though one you're actively paying for stays valid until that payment finishes.

- "Decline" tells the partner you're passing, with an optional reason. They can send you a new offer any time.
- If the price is $0, accepting only records the agreement — you'd then pay the partner directly, with no escrow protection.

STEP 5

Pay for the package or offer

Click "Buy this package" or "Accept and pay" and confirm in the window that opens. Read the note there: your payment is held by the platform until you accept the delivered work — if something goes wrong before then, you can ask for a revision, dispute it, or cancel for a refund while it's late. Confirm to open the payment page. If the payment window doesn't finish (you closed it, or it's still processing), go back to the order — it shows a "Continue payment" button until the payment resolves.

- The confirmation also repeats the platform's rule: pay and get paid only through the platform. Never send money to a partner outside it.
- "Check payment status" on the order page re-checks a payment that seems stuck.

STEP 6

Follow the order page

Once paid, the order page shows a live countdown to the delivery date (it turns into "LATE" after the deadline, and "Very late" a day after that), an activity feed combining every order event with your conversation, and an action bar on the side with the buttons available to you right now. The delivery clock starts as soon as you pay — send the partner your brief and any access they need (for example, a collaborator login) right away so they can get started.

- If the order needs your input, the partner will ask for it in the conversation — the clock keeps running while you sort that out.
- Give the partner access with "Grant store access" under Onboarding partners → My requests. Never share your own password.
- A partner starts with default access: no customer export, no order export, no store backup export and no finance. You choose what else they may do under Settings → Users → Collaborators → "Edit access".
- Settings → Activity shows what the partner changed in your admin. Only the store owner can open it.

STEP 7

Request a revision if the delivery isn't right

After the partner delivers, "Request revision (n left)" is available if your offer or package included revisions and you haven't used them all. Explain what needs to change; the partner delivers again and your review window opens fresh. Once all revisions are used, the button disappears and you can only accept or dispute what was delivered.

- A revision has no separate deadline of its own — the partner works from your note until they deliver again.

STEP 8

Approve or decline a deadline extension

A partner can ask for one extension per order, once. You'll see a banner on the order page with the new date they're proposing and their reason. "Approve new date" moves the delivery deadline (a late order stops being late if the new date is still ahead); "Decline extension" keeps the original date and the partner can't ask again for this order. The original deadline keeps counting down while you decide.

STEP 9

Accept, dispute, or cancel

Once you're happy with the delivery, click "Accept delivery" — this releases the payment to the partner (minus the platform's commission). If you don't act, the order accepts itself automatically 7 days after the partner's delivery notice, so it never stays stuck. If something is genuinely wrong and a revision won't fix it, click "Dispute" and explain — a platform administrator reviews it and decides, not the partner. If the partner hasn't delivered and it's more than 24 hours past the due date, "Cancel and get a full refund" becomes the main option; you can also cancel any time before delivery for a full refund of what's left to refund.

- A dispute pauses the auto-accept clock while it's reviewed.
- Canceling before delivery, or once an order is very late, refunds you in full — the partner is told why.

Check your work

- The order page shows "Paid" and a delivery countdown right after you pay.
- You can see the partner's delivery note and any links they shared once they mark it delivered.
- A requested revision shows in the activity feed and the partner is notified.
- Accepting the delivery moves the order to a completed status and stops the countdown.
- A canceled or fully refunded order shows the refund in the Refunds list on the order page.

Troubleshooting

I don't see "Buy this package", only "Request a quote".

On-platform buying isn't turned on for your store yet, or the package's price isn't fixed. Ask support to enable it, or request a quote and arrange payment off-platform with the partner (no escrow protection in that case).

The payment page closed before I finished.

Go back to the order — it shows "Continue payment" as long as the payment session is still open, or "Check payment status" to re-check one that might already have gone through. Nothing was charged if the payment never completed.

The offer I wanted to accept says it expired.

Ask the partner to send it again with "Send again" on their side — it becomes a new offer with a fresh expiry date. An offer you were actively paying for stays valid past its expiry until that payment finishes.

"Request revision" isn't there any more.

You've used all the revisions included with your package or offer (the order page shows "None included" or "0 of N left"). At that point you can accept the delivery or dispute it if something is genuinely wrong.

A partner asked me to pay them directly, outside the platform.

Don't. Payments made outside the platform aren't covered by escrow, refunds or dispute resolution. Keep the conversation and payment on-platform, and let support know if this keeps happening.

Need a hand? Contact support at https://lulu.us.com/contact. Screenshots use demonstration accounts; personal details were replaced.