LULU STEP-BY-STEP GUIDE

Follow one onboarding job from both sides

One onboarding job from start to finish, seen from the merchant's store admin and from the partner portal: getting listed, the request, in-app messages, a custom offer and payment, store access, delivery, review, hand-over of a client transfer store and customer registration.

For: Everyone · About 15 minutes · 18 steps · Updated November 20, 2026

Before you start Steps marked "Merchant:" happen in the store admin at admin.lulu.us.com; steps marked "Partner:" happen in the partner portal at partners.lulu.us.com/partners. The partner needs an approved partner account and a Published onboarding profile with at least one active package — a Draft or In review profile is not in the directory, so nobody can find it, message it, request a quote or buy from it, and it receives no requests. On the merchant side any staff member can read requests and conversations; sending messages, accepting offers and paying need the "Manage plan and billing" permission, and granting store access also needs "Manage users" (usually the store owner). Requests are free and commit the merchant to nothing. All conversations and payments stay on the platform.

Good to know On Lulu, budgets and package prices are in US dollars and the partner directory is at partners.lulu.us.com/experts.

Steps at a glance

1. Partner: Get listed in the directory
2. Merchant: Find the partner
3. Merchant: Send the request
4. Partner: Open the request in Leads
5. Partner: Answer in Messages and offers
6. Merchant: Reply and follow the status
7. Partner: Send a custom offer
8. Merchant: Accept and pay — or decline
9. Merchant: Grant store access
10. Partner: Or ask for access with the 4-digit code
11. Partner: Work in the store
12. Partner: Deliver, ask for more time, or decline
13. Merchant: Accept the delivery
14. Partner: Follow orders and earnings
15. Merchant: Leave a review — Partner: reply once
16. Merchant: Remove access when the work is done
17. Partner: Build on a client transfer store and transfer it
18. Partner: Register a customer you are launching

STEP 1

Partner: Get listed in the directory

Open "Onboarding profile" (under More). The status box lists what is still missing; every item is required before you can submit: a business name, a one-line tagline (at least 10 characters), an About text of at least 80 characters, at least one service, at least one active package, a contact email and a logo. Click "Save", then "Submit for review". The status becomes "In review" and the platform team either publishes the profile or sends it back with a reviewer note — you are emailed either way. There is no fixed turnaround for a profile review.

- A directory listing also needs the directory tier (Plus by default) or an invitation. Below it, the page shows "Request invitation" instead of "Submit for review": finish the checklist, add an optional "Note for the reviewers" and click it — invitation requests are reviewed within 5 business days.
- Until the profile is Published you get no leads, messages or orders. Merchants can still reach you through a store you were already working with.

STEP 2

Merchant: Find the partner

In the store admin open "Onboarding partners" in the left menu ("Hire an expert to set up your store"), search or filter, and click a partner. Their page has three buttons at the top: "Message" (start a conversation), "Public page" (the same profile on the public directory) and "Request a quote". Under "Packages" each package shows one button: "Buy this package" for a fixed price you can pay online, "View your order" if you already have an open order for it, otherwise "Ask for a quote".

- "Buy this package" appears only when on-platform buying is switched on for the store and you have "Manage plan and billing".

STEP 3

Merchant: Send the request

Click "Request a quote" (or "Ask for a quote" on a package). The form says "Sending as <your name> (<your email>) for <your store>"; choose the package, service, budget and timeline, describe the job and click "Send request". The request appears under Onboarding partners → "My requests" (the page is titled "My partner requests") with the status "Sent", and you get an email confirming it went out.

STEP 4

Partner: Open the request in Leads

The request arrives in "Leads" (the menu badge counts new ones) and at your profile's contact email. Click it to see the merchant's contact details, store, package, budget, timeline and message. A request sent from a store admin also shows a "Store access" section and the "Messages and offers" conversation.

STEP 5

Partner: Answer in Messages and offers

Write your answer in the request's "Messages and offers" conversation, or click "Open full conversation" to continue under "Messages". The merchant reads it in their admin and is emailed that you wrote (at most one email per conversation every 15 minutes). Your first message moves the request from New to Contacted and records your "First reply" — the merchant's status changes to "Partner replied". You can also set the "Status" and a "Private note" yourself and click "Save".

- "Reply by email" opens your own email program. Use it for requests from the public directory: they are not linked to a store and have no in-app conversation.
- Links only — there is no file upload. A message that looks like a request to pay outside the platform shows a warning; payments outside the platform have no escrow, refund or dispute protection.

STEP 6

Merchant: Reply and follow the status

In "My requests" click "Messages & offers" on the request (or open Onboarding partners → "Messages"). The status column reads: Sent (the partner has not answered yet), Partner replied, Quoted (the partner sent an offer), Working together (you granted access or paid an order), Access removed (you granted access and later removed it, with no paid order on this request) or Closed (the partner closed the request as lost or spam).

STEP 7

Partner: Send a custom offer

In the conversation click "Send offer". In "Send an offer" either base it on one of your active packages (you can only lower its price) or choose "Custom offer (no package)" and set your own price and currency. Set "Delivery (days)" (1–90), "Revisions" (0–10) and how long the offer stays open (1–30 days, 14 by default), then click "Send offer" (or "Save draft"). The request moves to Quoted. A new offer for the same request replaces your previous one unless the merchant is already paying for it.

- You cannot send an offer to your own partner stores.
- Prices below the platform's minimum offer price are refused with a message.

STEP 8

Merchant: Accept and pay — or decline

The offer appears as a card in the conversation with the price, any discount, delivery days and revisions. Click "Accept and pay <price>" and complete the payment page — the platform holds the money until you accept the delivered work — or "Decline" (with an optional reason). An offer with a price of 0 shows "Accept offer": it only records the agreement, with no payment and no escrow. Once paid, the order appears under Onboarding partners → "Orders" for you and under "Orders" in the partner portal, and the request becomes Working together. The delivery clock starts when you pay.

STEP 9

Merchant: Grant store access

In "My requests" click "Grant store access". The dialog explains what the partner can do: they sign in with their own partner account and can work on themes, products, orders, apps, shipping and store settings, but cannot manage users, change your plan, approve paid app charges, see your finances or use Point of Sale, and they don't use a staff seat. Click "Grant access". The row shows "Access granted" and "Remove access", the status becomes Working together, and the partner is emailed.

- The partner starts with default collaborator access. It does not include exporting customers, exporting orders, exporting a store backup, finance or approving paid app charges. To change what this partner can do, open Settings → Users → Collaborators, find them under "Collaborator access" and click "Edit access". Tick or untick sections, then click "Save access". This works on every plan.
- Granting needs both "Manage users" and "Manage plan and billing", and you can only hand over permissions you hold yourself.
- A collaborator can never manage users or roles, change your plan, transfer or close the store, use Point of Sale or restore a backup.

STEP 10

Partner: Or ask for access with the 4-digit code

If the merchant prefers, ask them for the "Collaborator request code" shown under Settings → Users → Collaborators. In the lead's "Store access" section enter it, add an optional "Message" and click "Request access". The lead shows "Access requested — waiting for the merchant to approve it in Settings → Users → Collaborators"; the merchant is emailed and approves it under "Requests".

- A wrong code answers "No store matches that address and code". Codes are tried at most 10 times a minute, and the merchant can replace the code with "Generate new code" at any time — ask for the current one.
- Type the code carefully. After 5 wrong codes for a store, new requests to that store are locked for 60 minutes and the store is told by email. Nobody gets access. Wait, then ask the merchant for the current code.
- A wrong code, a wrong store address and a locked store all show the same message: "No store matches that address and code".

STEP 11

Partner: Work in the store

Stores that granted you access appear on your Dashboard under "Client stores"; click "Open admin" (also in the lead) to work in the normal store admin with your own login. Everything you do is recorded under your name.

STEP 12

Partner: Deliver, ask for more time, or decline

Open the order under "Orders". The "What's next" box offers "Deliver now" (write a delivery note and add up to 5 links, then "Mark delivered"), "Request extension" and "Decline order". You can ask for one extension per order, before you deliver, to a date at most 30 days after the current due date; the merchant approves or declines it and the original date keeps running meanwhile. "Decline order" (a reason of at least 10 characters) is only possible before you deliver and refunds the merchant in full.

- When the merchant asks for a revision the order shows "The merchant asked for a revision"; make the change and click "Deliver revision".
- Disputes are opened by the merchant and decided by the platform team, not by either side. Partners cannot issue a partial refund themselves — answer in the conversation and the platform team resolves it.

STEP 13

Merchant: Accept the delivery

On the order page click "Accept delivery" to release the payment to the partner. While revisions remain you can click "Request revision (n left)" instead; if something is genuinely wrong, click "Dispute". If you do nothing, the order accepts itself 7 days after the delivery notice. Before delivery you can "Cancel order" for a refund, and once the order is more than 24 hours late "Cancel and get a full refund" leads.

STEP 14

Partner: Follow orders and earnings

"Orders" lists your orders with a status filter ("All statuses", "Open", …). Tick "Include test orders" to also show orders paid while the platform's payments ran in test mode; a test order never counts toward earnings and is never paid out. "Earnings" shows, per currency, what is Held (delivered, not yet accepted), Due to you (accepted), In an open payout and Paid out.

- The platform's commission (10 % unless the platform sets another rate) comes off the price the merchant paid and is fixed on each order when it is bought.
- A package priced in LKR is paid and paid out in LKR; one priced in USD in USD. Payouts are prepared and transferred by the platform team, one currency at a time.

STEP 15

Merchant: Leave a review — Partner: reply once

As soon as the store has a request or an order with the partner, "Leave a review" is available in "My requests" — it does not wait for the work to finish. Choose 1–5 stars, an optional "Headline" and at least 20 characters under "What was it like to work with them?", then click "Publish review". It is published straight away; each store reviews a partner once. The partner answers from "Reviews" in the portal with "Reply": one public reply per review, which cannot be edited afterwards.

STEP 16

Merchant: Remove access when the work is done

Access does not end when an order is accepted or when the partner closes the request. It ends on its own only when the partner has not signed in to your store for 90 days; they get a warning email after 75 days, and you get an email when it expires. When you no longer need the partner, remove the access yourself: click "Remove access" in "My requests", or under Settings → Users → Collaborators open their row menu and choose "Remove collaborator". They are signed out of the store straight away, and a request that was only won through store access then shows "Access removed".

- Partners: open the store admin from your Dashboard before the date in the warning email to keep your access. If it expired, ask the store owner to give it back under Settings → Users → Collaborators.
- The Collaborators tab shows "Access ends <date> if not used" next to a collaborator.
- Store owners: Settings → Activity lists what each collaborator changed in your admin.

STEP 17

Partner: Build on a client transfer store and transfer it

To build a new store for a client, go to Dashboard → "Stores" → "Create store", choose "Client transfer store", type a store name and click "Create". It has Advanced plan features; tick "Enable Plus features" if your client needs Plus. When it is ready, click "Transfer to client", enter the "Client's email" and an optional "Personal message" (up to 500 characters) tick "The domain and the payment gateway accounts used by this store belong to my client, not to me." and click "Send transfer". The client gets an email with an accept link valid for 30 days; "Resend invite" sends a fresh one. When the client accepts, they become the store's owner and land on the Plan page to choose a plan; you keep collaborator access until they remove it, and the store moves to your "Client stores".

- The merchant sees: the transfer email with your message, an accept page, then Settings → Plan with a hand-over notice. Nothing changes on the store until they accept.
- "Transfer to client" is offered only on client transfer stores. Dev stores can't be transferred. Every partner store you created before 30 October 2026 is now a client transfer store.
- Until the transfer, the store is always password-protected and takes test orders only: no real payments, gift cards or store credit. It can't go live.
- A paid app plan is free on your partner stores only if it is a free plan, a plan marked "Free for partners", or (on dev stores) a plan of your own app. Other paid plans show "Not free on partner stores" and can't be chosen; the store owner picks them after the transfer.
- After the transfer, apps that were free on your store start the app's normal free trial, then bill the new owner.
- A paid Theme Store theme stays a trial on a partner store: you can customise and preview it, but its code (custom.js and head snippets) is read-only and it can't be published. The client buys it after the transfer.
- "Send transfer" stays greyed out until you tick the confirmation. Your confirmation is stored with the transfer.
- If a custom domain or a live payment gateway is connected, the drawer warns you and names it. After the transfer the store keeps using them, so make sure your client controls the domain's registration and DNS and that the gateway account is their own.
- If the client does not accept within 30 days, the invitation expires and we email you. Send a new one with "Transfer to client".

STEP 18

Partner: Register a customer you are launching

Under "Customers", fill in "Register a customer": "Program", "Merchant legal name", an optional business registration number, "Merchant contact email", the store domain if known, the "Intended plan" and "Merchant consent" — where the merchant agreed that you launch their store (for example "signed proposal #42" or "email of 3 Oct from the owner"). Keep the original: the platform may ask for it. Click "Register customer". The answer is always "Registered — under review. The registration holds for 90 days."

- Under review means the platform team checks the claim; you see it become Qualified, Converted (a store enrollment of this customer was confirmed), Rejected or Expired (90 days passed without one).
- Registering requires an approved Partner or Reseller Program membership with the current agreement accepted.

Check your work

- The partner's onboarding profile shows Published and the partner appears under Onboarding partners in the merchant admin.
- A request sent from the admin shows in the partner's Leads and in the merchant's My requests as Sent.
- The partner's first message in Messages and offers turns the merchant's status into Partner replied.
- A sent offer shows as Quoted; paying it creates an order on both sides.
- After Grant access the row shows Access granted and Working together, and the store is under the partner's Client stores.
- Access is removed deliberately when the work is done.

Troubleshooting

Partner: my profile is a Draft and I get no requests.

Draft and In review profiles are not in the directory, so merchants cannot message, request a quote or buy from them. Finish the checklist and click "Submit for review" — or "Request invitation" if your tier is below the directory minimum — and wait for the profile to be published.

Merchant: My partner requests says "Sent" although the partner answered.

The status follows the conversation: it changes to "Partner replied" as soon as the partner writes in Messages & offers, and to "Working together" once you grant access or pay an order. If the partner answered only by email outside the platform, the status stays "Sent" until they write in the conversation or update the request.

Merchant: the partner says they will reply from their own email.

That only applies to requests sent from the public directory, which are not linked to a store. Requests sent from your admin have an in-app conversation: ask the partner to answer under Messages & offers so the conversation and any offer stay on the platform.

Partner: "Include test orders" shows nothing.

Test orders exist only when the platform's payment gateway runs in test mode at the moment of purchase. Orders paid with live payments are real orders, listed without the tick.

Partner: I can't send an offer or the merchant can't buy.

You cannot sell to your own dev stores or client transfer stores, the profile must be Published and your account active, and on-platform buying must be switched on for the merchant's store.

Partner: the lead has no "Store access" section.

Only requests sent from a store admin are linked to a store. Ask the merchant to send the request from their admin, or to grant access from My partner requests.

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