SALES PARTNER ONBOARDING AGREEMENT

A clear working agreement for qualified referrals and partner communication

This draft is designed for review before a final agreement is issued through Zoho Sign or another approved signature workflow. It does not create compensation terms, territory exclusivity, or authority to bind the company unless those terms are separately confirmed in writing.

Company 305 Underground Construction	**Partner** _____
Effective date _____	**Territory / focus** _____

1. Purpose and relationship

The company and the partner want a consistent process for identifying and introducing residential and commercial construction opportunities. The partner may introduce opportunities and support communication, subject to the company's review and approval. The partner is an independent referral or sales partner unless a separate written agreement states otherwise.

2. Partner responsibilities

• Represent the company and its services accurately and professionally.

• Collect only information the customer has chosen to share and send it through the approved process.

• Provide useful context: property, project type, scope, timing, access notes, and decision-maker contact.

• Avoid duplicate submissions and promptly communicate material updates.

• Complete required orientation, acknowledgements, and account-security steps before using the partner portal.

3. Customer and lead standards

A qualified opportunity should be specific enough for the project team to understand the customer's goal and determine the next step. The partner must not promise pricing, availability, approvals, permitting outcomes, construction start dates, or a particular result before the company reviews the opportunity. The company may accept, decline, defer, or request more information for any opportunity.

4. Confidentiality and information handling

• Protect customer contact details, property information, plans, photos, and other non-public information.

• Use company-approved accounts, forms, and portal tools for business communication.

• Do not sell, reuse, publish, or share customer information outside the approved project process.

• Notify the company promptly if information is sent to the wrong person or an account may be compromised.

5. Communications and compliance

The partner will follow applicable marketing, privacy, anti-spam, consumer-protection, and solicitation rules. The partner may not make statements that are deceptive, discriminatory, unsafe, or inconsistent with the company's written guidance. The partner has no authority to sign contracts, change scope, approve work, collect funds, or make commitments on the company's behalf unless expressly authorized in writing.

6. No unauthorized promises or side arrangements

• Do not represent that a customer is approved, that work is guaranteed, or that a price, discount, schedule, permit, result, or warranty is fixed.

• Do not request, accept, route, or hold customer deposits, cash, checks, gift cards, or other consideration on behalf of the company.

• Do not sign a customer document, alter scope, make a side agreement, or use a personal channel to bypass the approved handoff.

• Do not disappear after a referral: respond to reasonable operations requests, preserve the communication record, and promptly report any complaint, cancellation, dispute, or suspected misrepresentation.

• If a customer asks for a commitment the partner cannot authorize, the partner must say that the project team must review it and route the question through an approved company channel.

7. Compensation and commercial terms

Any referral fee, commission, payment trigger, expense policy, tax treatment, territory, exclusivity, or sales target must be stated in a separate written schedule or agreement signed by the parties. This onboarding agreement does not establish a payment amount or guarantee payment.

8. Portal access and security

Portal access is role-based and may be limited, suspended, or revoked. The partner is responsible for protecting credentials, using only their assigned account, and reporting suspected unauthorized access. Portal access does not itself create ownership of a customer, deal, commission, or project.

9. Term and ending the relationship

Either party may end the onboarding relationship by written notice. The company may immediately suspend access or stop a referral process when it believes there is a security, privacy, compliance, customer-care, or reputational concern. Ending access does not remove obligations to protect confidential information or complete any required records handoff.

10. Acknowledgment

By signing or accepting this agreement through an approved digital workflow, the partner confirms that they read and understand the onboarding standards, will use approved channels, will not make unauthorized promises or side arrangements, will remain responsive after a referral, and will ask the company when a situation is unclear. The partner understands that final commercial terms, if any, require a separate written agreement.

Partner legal name	Company representative

_____	_____
Signature / digital acceptance	Signature / digital acceptance
_____	_____
Date	Date
_____	_____