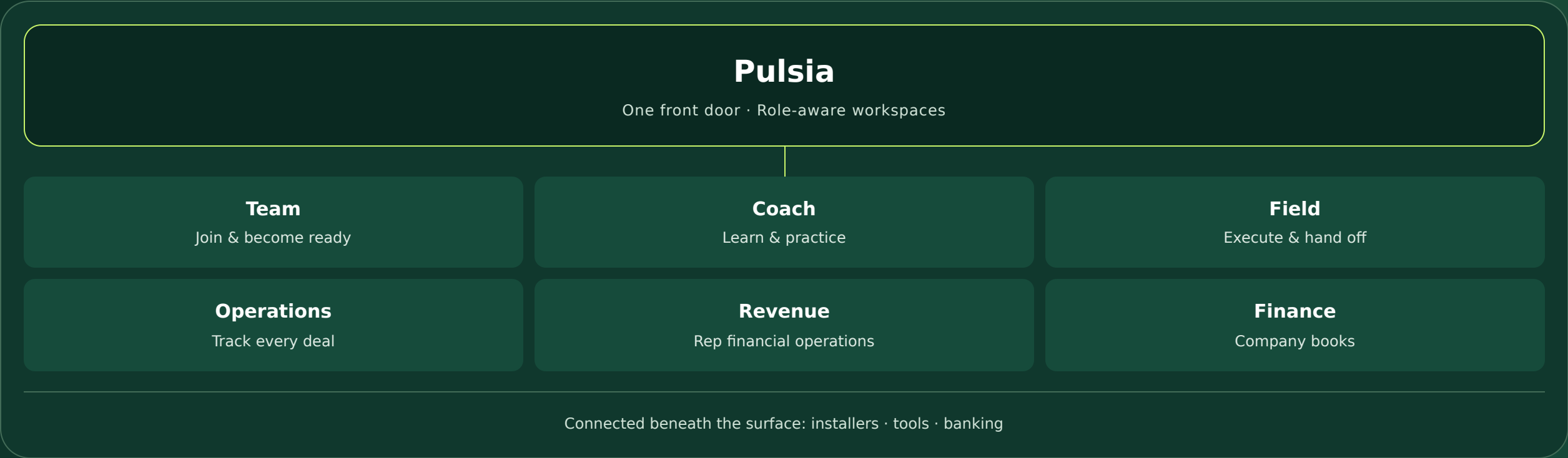


One Pulsia.

The whole HRN operating journey.

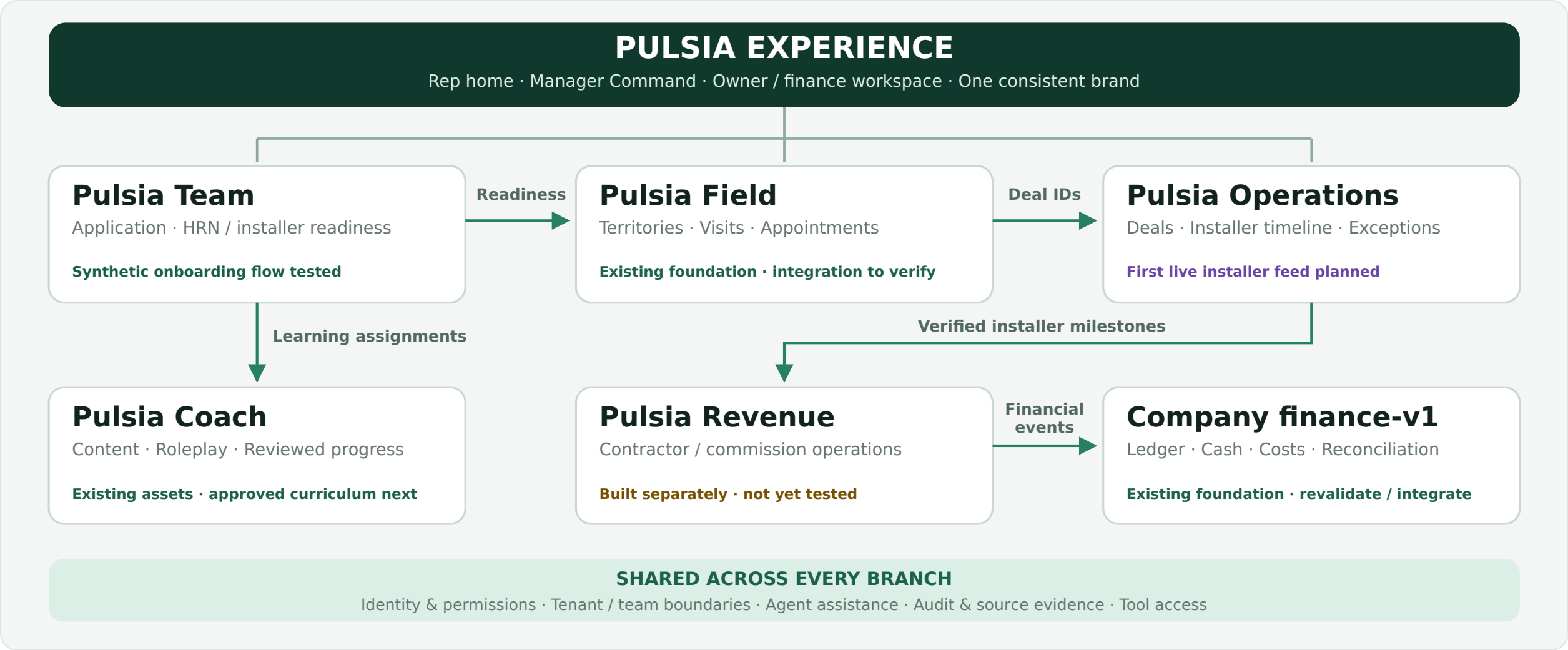
From a rep’s first application to an installed deal and reconciled company finances.

Prepared for John & Erica · A shared planning map, not a claim that every connection is live.



One front door. Connected operating branches.

A shared rep workspace and manager Command view, with separate permissions for company finance.



Integrate the tools. Keep Pulsia the experience.

External systems retain their specialist responsibilities. Pulsia brings the permitted facts and next actions together.

INSIDE PULSIA

OUTSIDE PULSIA

Team · HRN readiness Separate screening and document states	Screening & hosted paperwork Checkr / approved document providers
← Status references, not sensitive report bodies	
Team · Installer tracks & tools Requirements per installer / region	Installer portals & tools Recheck for Sunvena where required
← Requirements, access evidence, approved links	
Operations · Deal timeline Acceptance through installation	Installer / EPC API First partner to select · read-only first
← Project IDs, source statuses, dates, blockers	
Coach · Learning & practice Role- and product-specific knowledge	Approved content & coaching HRN / installer sources · supported tools
← Reviewed materials and scoped coach services	
Revenue · Contractor operations Existing build to inspect and test	Approved financial providers Provider selection / activation separately gated

Start your day knowing what comes next.

Your Pulsia home brings your HRN progress, installer requirements, training and tools into one clear view.

Pulsia

HomeRun Network · My dashboard

Your next step, right in front of you.

See what to finish, what you can use and who can help.

Preview of the planned experience

WHAT SHOULD I DO NEXT?

Pick up where you left off.

Find your next onboarding step or lesson, with clear instructions and a person to ask for help.

My next step

Ask for help

HOW AM I DOING?

Joining HRN

Your progress

Your installer

What's left to finish

Your training

Your next lesson

Ready to work?

Manager's go-ahead

WHAT CAN I USE?

Your tools, in one place.

See which tools are ready, which need setup and how to get started. No guessing where to go.

Field

Coach

Installer tools

My appointments

My deals

My training

My commissions

My team

For reps: follow your progress from joining HRN to working with your assigned installer, without hunting through messages.

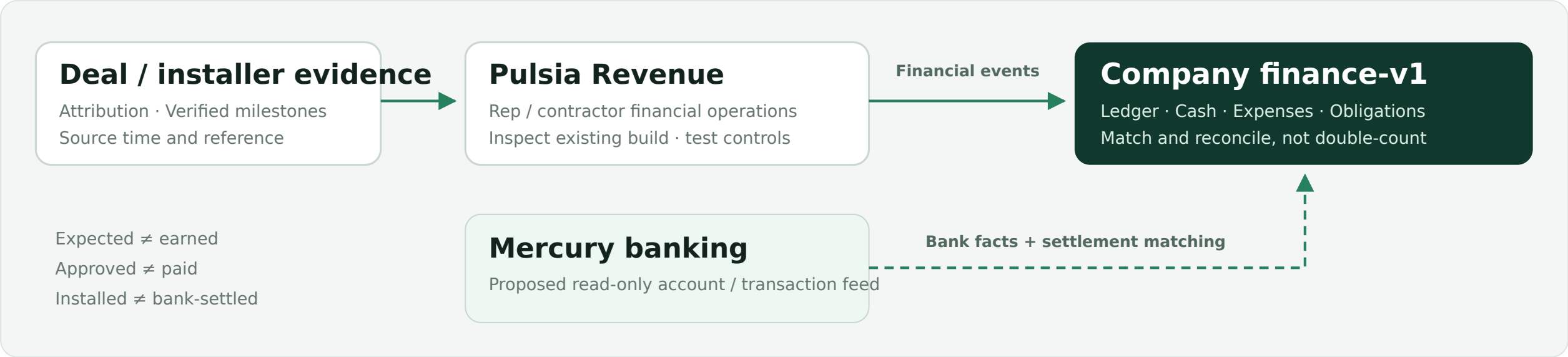
For managers: see who needs help, what they are waiting on and where a quick follow-up can keep them moving.

YOUR MANAGER CONFIRMS WHEN YOU ARE APPROVED TO WORK

04 / 08

Connect Revenue and Finance. Don't duplicate them.

Revenue explains rep obligations. Finance owns the company's books. Mercury provides bank facts to reconcile.



Revenue · untested build

Integrate, don't rebuild.

Inventory John's existing module, test its capabilities and agree the event contract.

Finance · existing foundation

Protect the company books.

Revalidate balanced entries, reversals, tenant isolation and accountant exports.

Mercury · planned connection

Visibility before money movement.

Verify supported API access. Start with read-only data and reconciliation.

Ask Pulsia. Get back to your day.

Instead of chasing updates across messages and websites, ask a question about your work in plain language.

A LOOK AT THE PLANNED EXPERIENCE

“What is holding up my installation, and what do I need to do?”

As a manager: “Which deals on my team need attention today?”

01 / ASK

Get a clear answer.

See what has happened with your deal, when it was last checked and what needs attention.

02 / CHECK

Look for an update.

Ask Pulsia to check for newer information. If the installer has not provided it, you’ll know.

03 / FOLLOW UP

Have a message ready.

Ask for a follow-up to the installer, with your deal details and the question you need answered.

04 / REVIEW

You stay in control.

Review the message and who will receive it before you approve sending. Keep the reply with your deal.

For reps: spend less time chasing an answer and more time knowing what to do next.

For managers: spot the deals that need help and keep the right people informed.

Build a usable rep home. Start integrations early.

Progress in small accepted releases, with installer discovery and financial intake running in parallel.

People & daily work

The primary product path

1 · Close the entry release

Application-to-approval gates, branding and clear errors.

2 · Rep workspace

Real HRN content, one installer track, tools and next actions.

3 · Training pilot

One approved learning path, practice and human review.

Installer & deal flow

Start discovery alongside the workspace

Select the first partner

API contact, access, real stage definitions and required fields.

Prove a read-only feed

Deal matching, source freshness, retries and exception handling.

Add requested assistance

Shared status views, answers and governed follow-up.

Revenue & company books

Reuse existing builds

Intake & validate

Inspect Revenue and finance-v1; resolve overlaps and permissions.

Agree event contracts

Rep, company, deal and financial references with auditability.

Reconcile with Mercury

Authorized read-only bank facts matched to company records.

Across every lane: preserve Pulsia branding, mobile usability, data boundaries and human approvals. Continue existing Field work without silently enabling connectors. Dates follow partner access, content readiness and accepted scope.

What we have. What we decide next.

A working test journey is a strong foundation. The next step is a small, real operating slice for HRN.

Current planning baseline

AREA	EVIDENCE LEVEL	NEXT GATE
Onboarding flow	Synthetic test passed	Production gates, real content and branding fix.
Field / Coach	Existing foundations	Verify current fit, integration and approved content.
Pulsia Revenue	Built, not tested	Receive handoff, inspect and validate.
finance-v1	Earlier isolated tests	Revalidate current build and integrate.
Installer / Mercury	Connections planned	Confirm capability, access and source mapping.

Discussion with Erica

Which installer should we prove first?

Choose the partner, product, region and contact who can validate its requirements and deal feed.

What must a new rep finish before working?

Confirm HRN vs installer requirements, the content approver and the manager sign-off boundary.

What should be visible every day?

Prioritize the rep’s next action, manager exceptions and the most useful deal updates.

Our next useful release: one Pulsia-branded rep workspace, one approved HRN onboarding path and one installer requirements track, while the first API connection is prepared.