IMRTechnologies

EXPERT NETWORK

Welcome, Expert. From sign-up to your first payout

What happens at each step, where to find it in your dashboard, what IMRTechnologies does to bring you work, and what we ask of you.

YOUR GUIDE AT A GLANCE

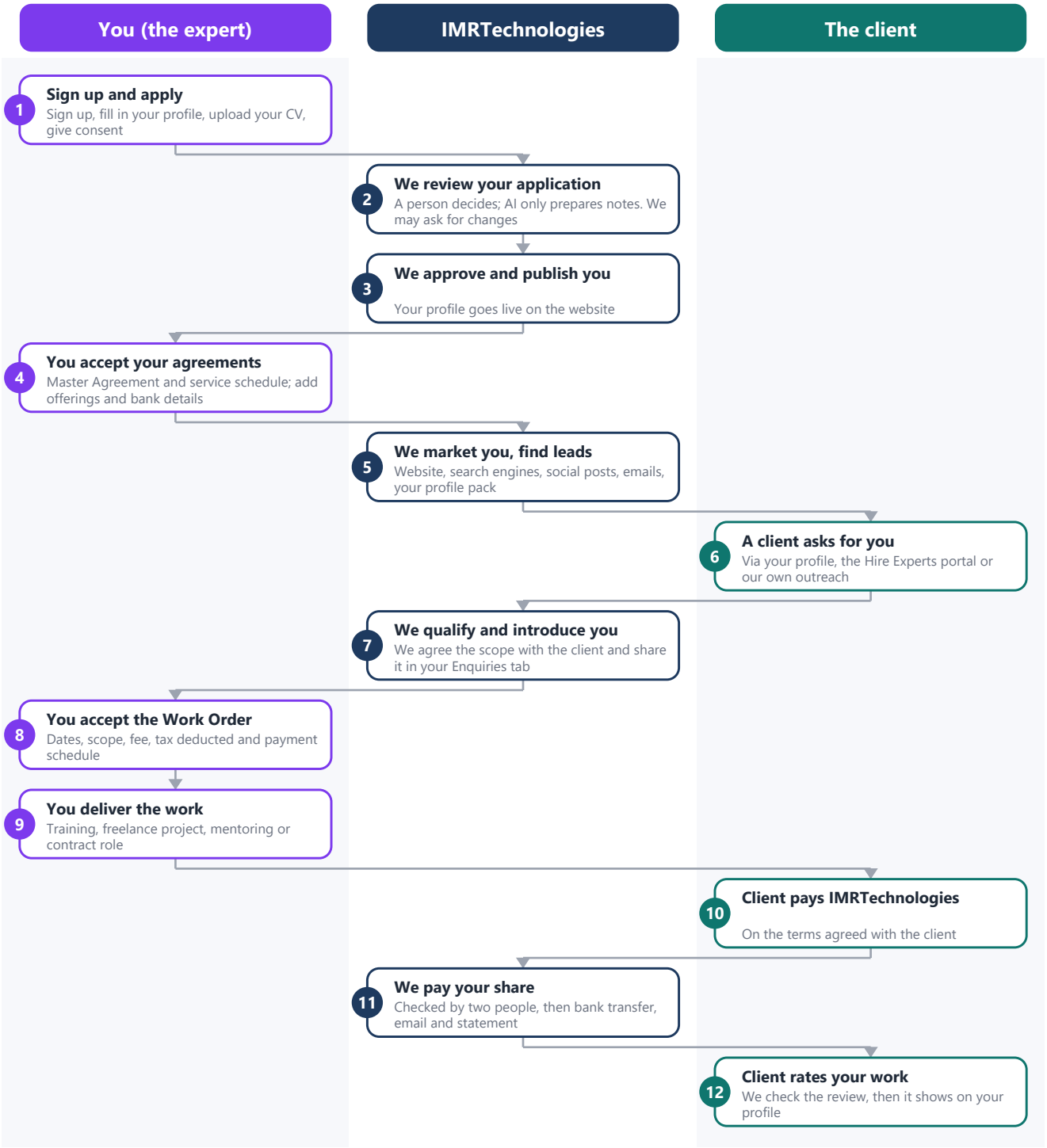
Where to look	What you will find	Where in the app	Page
The whole journey	One picture: every step from signing up to being paid and rated, and who does what.	This guide	2
What IMRTechnologies does for you	How we market your profile, bring you leads and keep you informed.	This guide	3
Step 1. Account, dashboard and application	Sign up, sign in, find your dashboard from the top-right menu, fill in the form field by field.	Website > profile menu > Dashboard	4
Step 2. Review	What happens after you apply and what each status means.	Dashboard > Expert Network > Overview	5
Step 3. Dashboard, offerings, mentoring	The tabs and what each is for; courses, packages, mentoring slots.	Offerings and Mentoring tabs	6
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Keep this guide. You can download the latest copy any time from your Expert dashboard.

OVERVIEW

Your journey, from sign-up to getting paid

Three parties take part: you, IMRTechnologies and the client. You stay independent. We find the work, handle the introductions, the paperwork and the payment; you do the work.



In simple terms

You build a good profile and do the work. **We** check, publish and market you, bring you clients, handle contracts and pay you. **The client** asks, pays and rates.

OUR ROLE

What IMRTechnologies does for you

Approval is the start. We put your profile in front of the people who need your skills, handle every lead and keep you informed.

How we market you	What we do
Our website	Your approved profile is in the Experts directory and, for trainers, on the Training page with your courses; profiles are in the site map for search engines.
Social media	We can feature a published expert by name, using only the facts on your approved profile (skills, certifications, experience). AI drafts the post, it is checked against your profile, a person approves it and our team posts it.
Email, outreach, portals	Our team writes to companies, training teams and past clients and recommends you by name. Companies with Hire Experts can also browse approved experts and send us a tracked request for you.
Your profile pack	From your CV and course outline we prepare a branded profile (PDF or Word) and a course outline to send with proposals. Send us your latest CV whenever it changes.

HOW A LEAD REACHES YOU

1. **A request arrives**
   From your profile, a company portal or our own outreach. Every request is recorded as a lead and our team is alerted.
2. **We talk to the client first**
   A coordinator finds out the need, dates, audience and budget, so you are only asked about real, suitable work.
3. **We introduce you**
   It appears in your **Enquiries** tab as **Shared with you**, and a coordinator may call or message you to confirm availability and fee. Client contact details stay with us.
4. **The deal is closed**
   If both sides agree we create the engagement and send you a Work Order. If not, the enquiry is closed.

HOW WE KEEP IN TOUCH

You hear from us by email at each milestone, and a coordinator may call or message you when a lead is shared. The full list of emails is on page 9.

An honest note: we market your profile and introduce you; we cannot promise a number of enquiries or a volume of work. Keep your phone, email and availability current under My profile > Private details.

STEP 1

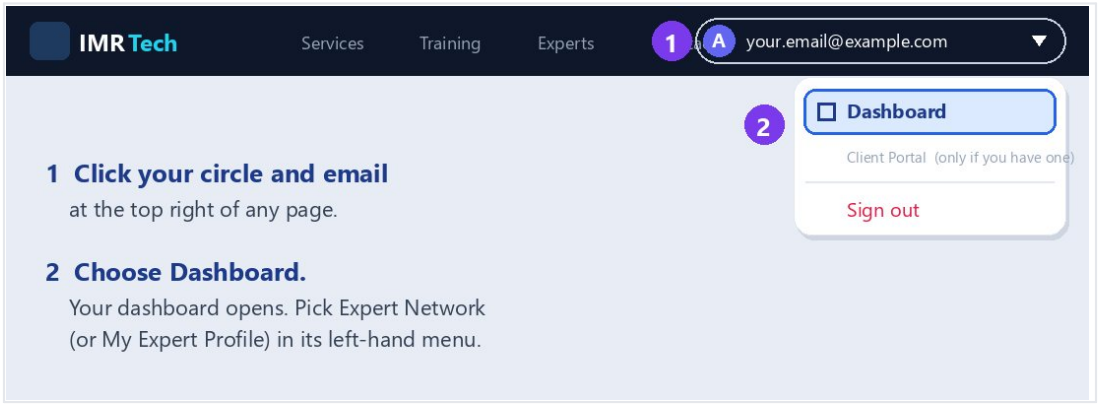
Create your account and find your dashboard

Have your CV ready (PDF or Word, up to 5 MB). The whole application takes about ten minutes.

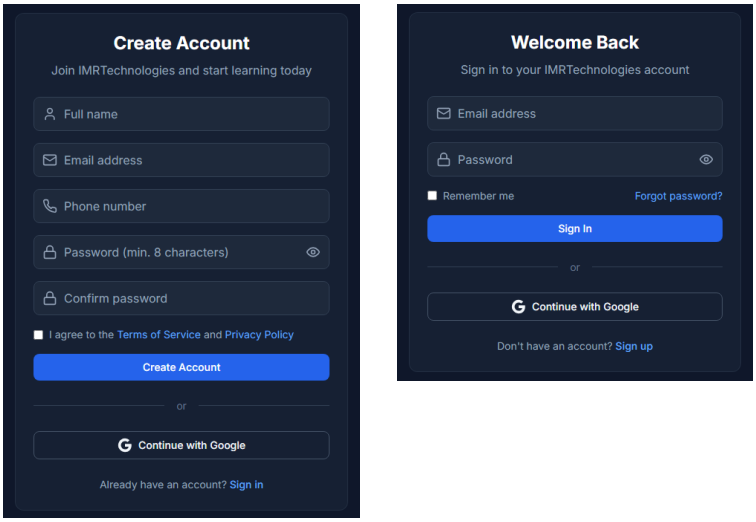
1. **Open the sign-up page**
   On the website choose **Join the Expert Network** (the bar at the top, or Expert Network in the menu), then **Create an account**. Already registered? Choose **Sign in to apply**.
2. **Fill in the form**
   Full name, email, phone, a password of at least 8 characters (twice) and tick Terms of Service and Privacy Policy. Press **Create Account**, or **Continue with Google**.
3. **Confirm your email**
   Open the link we send you once. Not there? Check spam.
4. **Sign in**
   Use your email and password (or Google). **Forgot password?** sends a reset link.

FINDING YOUR DASHBOARD

Once you are signed in, your dashboard is one click away from **any page** of the website. Click your **circle and email address at the top right**, then choose **Dashboard**. In the dashboard menu on the left, choose **Join the Expert Network**; after you apply it is called **My Expert Profile** (and Expert Network once you are approved).



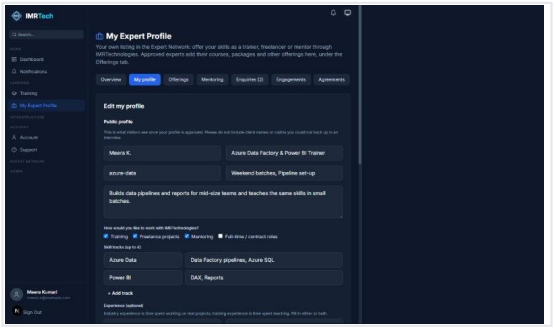
The top-right menu (illustration). If you also have a client portal, a Client Portal item appears above Dashboard.



Sign-up form (left) and sign-in page (right).

STEP 1 CONTINUED

Fill in the application form



My profile: the application form. You can save a draft and come back.

Field	What to write
Display name, headline	What visitors see. First name and initial is fine. Headline: one line on what you do, e.g. Power BI and Power Apps Trainer (max 120 characters).
Main platform and other technologies	Pick the closest main platform, then add every other technology you also teach or deliver in. Clients searching any of them can find you.
Summary, skill tracks	Summary: up to 800 characters, plain language, no client names. Up to 4 skill tracks: a technology plus topics, e.g. Power BI: DAX, data modelling.
Experience, certifications	Years in industry and in training; each certification with issuer and year. Only claim what you can show.
What you offer	Tick at least one: training, freelance projects, mentoring, full-time or contract roles.
Private details, resume	Contact email, phone, expected rates, availability, and your CV (PDF or Word, up to 5 MB). Only our team sees these.
Consent box	Agrees that we may show your public details once approved and use your private details to review you and connect you with opportunities.

Press **Submit application**. You see Application submitted and receive a confirmation email.

STEP 2. REVIEW: WHAT HAPPENS NEXT

Every profile is reviewed by a person. An automated assistant prepares notes but never decides. Your Overview tab shows where you stand.

Status you see	What it means	What you do
Under review	Our team is reading your profile and resume.	Nothing; you will get an email.
Changes requested	The reviewer left a note.	Update the profile and save; it returns to review.
Approved / Live on the website	Accepted and published; clients can enquire. Your roles switch on automatically.	Accept agreements, add offerings, check payment details.
Not accepted	We could not list you at this time.	Update and resubmit. Career gaps are never a reason.

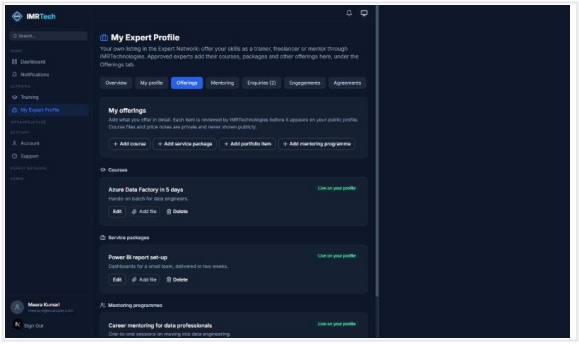
Editing later: changing public text on an approved profile sends it back for a quick review; changing private details does not.

YOUR DASHBOARD

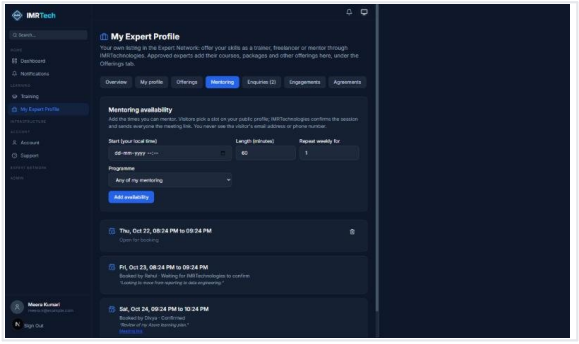
Finding your way around, offerings and mentoring

Tabs appear as you become eligible for them. Only approved offerings appear on the website.

Tab	Who sees it	What it is for
Overview	Everyone	Status, roles, link to your public profile.
My profile	Everyone	Edit your profile, replace your resume, or withdraw.
Offerings	Approved trainers, freelancers, mentors	Courses (with outline and technology tag), service packages, portfolio items, mentoring programmes. Reviewed before they go live.
Mentoring	Approved mentors	Add slots (15 min to 4 h, weekly if you like); we confirm bookings and email you the meeting link; press Mark completed afterwards.
Enquiries	Approved members	Requests we have shared with you. Client contact details stay with us.
Engagements	Approved members	Your work, share, payouts, payment details, statements and client reviews.
Agreements	Approved members	Read and accept agreements and Work Orders; download signed copies.



Offerings tab: add an item, submit it for review and track approval.



Mentoring tab: your slots and who booked them. Visitors see your open times in their own time zone.

STEPS 4 AND 5

From enquiry to engagement, and your agreements

Clients never contact you directly at first. This protects you from spam and protects clients from being approached by many people.

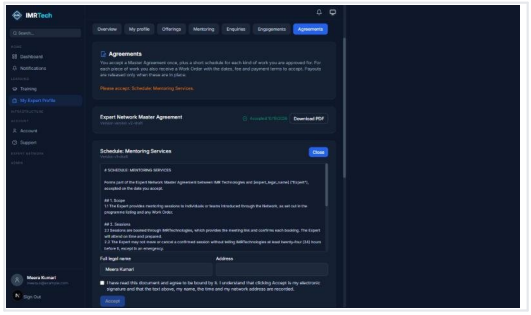
1. **We qualify the enquiry and introduce you**
   Shared in your **Enquiries** tab (see page 3).
2. **An engagement is created**
   Type (training, freelance, mentoring, contract), scope, dates and your share appear in **Engagements**.
3. **You accept the Work Order**
   Dates, fee, tax deduction and payment schedule. Accept, or ask for changes.
4. **You deliver, then we complete**
   Tell us if scope or dates change before anything is paid. On completion we ask the client to rate the work.

> **Please do not take the work off-platform**
> Introductions made here are covered by the non-circumvention clause of your Master Agreement. If a client asks you to work outside the network, tell us first.

YOUR AGREEMENTS (AGREEMENTS TAB)

Document	What it covers	You accept it
Master Agreement	How the relationship works: independence, confidentiality, data protection, IP, conduct, tax, non-circumvention, liability.	Once, and again if we publish a new version.
Service Schedule	Rules for the kind of work you are approved for.	Once per service.
Work Order	One engagement: dates, scope, fee, tax deduction, payment schedule.	For every engagement.

Open the Agreements tab, read the document, type your full legal name and address, tick the box and press **Accept**. This is your electronic signature; we record the text you saw, the time and a document fingerprint. Use **Download PDF** for your copy on our letterhead.



Accepting a schedule: type your legal name and address, tick the box, press Accept.

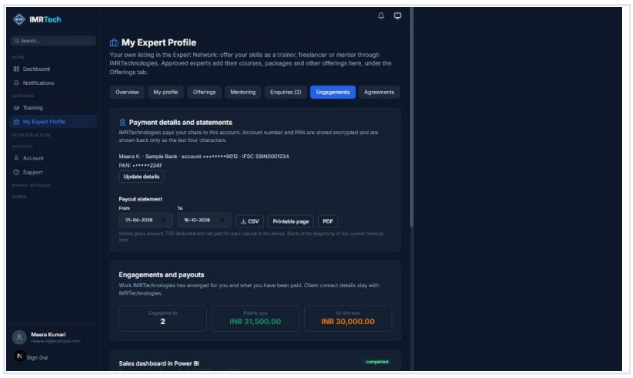
> **Payouts and agreements go together**
> A payout is released only after you accept the Master Agreement, the schedule and the Work Order. If one seems stuck, check the Agreements tab. You may have the agreements reviewed by your own adviser.

STEPS 6 AND 7

Getting paid, and client reviews

Everything money-related is in the Engagements tab.

1. **Add payment details once**
   Engagements > **Payment details**: account holder, bank, account number, IFSC and PAN. Stored encrypted and shown as the last four characters.
2. **Your share is set in the Work Order**
   Tax deducted at source (TDS) is shown separately.
3. **A payout is created and checked by a second person**
   Nobody can approve their own payout.
4. **We pay you**
   You get an email with the gross amount, TDS and net amount, and the bank reference.
5. **Download a statement**
   Pick a period (starts at 1 April) and download CSV, a printable page or PDF for your tax records.



Payment details and statements, at the top of the Engagements tab.

Payout status	Meaning
Being processed	Created by finance, waiting for a second person to approve.
Approved	Checked and ready to be paid.
Paid	Transferred; the bank reference and date are shown.

CLIENT REVIEWS

- When an engagement is completed the client is emailed a private link to rate the work from 1 to 5 stars, with an optional comment.
- Our team checks each review before it appears. Approved reviews show an average rating on your profile and directory card. You can see them in the Engagements tab.
- No review is shown without a real completed engagement behind it.

> **Keep your details right**
> Payouts to missing or incomplete bank or PAN details are held until you fix them. Update them before they change.

CONSENTS AND EMAILS

What you agree to, and the emails you will receive

Nothing is signed on your behalf. You agree to each item yourself, in this order.

When	What you agree to	Where
Creating your account	Terms of Service and Privacy Policy (tick box).	Sign-up form
Applying	Consent: we may show your public profile details on the website once approved, and use your private details and resume to review you and connect you with opportunities. You can edit or withdraw at any time.	Application form, tick box
After approval	Master Agreement (once, again if a new version is published) and a Service Schedule for each kind of work you are approved for. Type your legal name and address, tick the box, press Accept.	Agreements tab
For every engagement	The Work Order: dates, scope, fee, tax deduction, payment schedule. Accept, or ask for changes.	Agreements tab, and the email below

EMAILS YOU WILL RECEIVE

When	The email	What to do
You submit your application	Confirmation, with this Welcome Guide attached.	Nothing; we are reviewing.
A decision on your application	Approved (with a What to do next list), changes requested (with the reviewer's note) or not accepted.	Follow the list, or update and resubmit.
A decision on an offering	Approved, changes requested or not accepted, with the reviewer's note.	Edit and resubmit if asked.
A Work Order is ready	Work Order number and title.	Open the Agreements tab; accept or ask for changes.
A mentoring session is confirmed	Meeting link, then a reminder the day before.	Hold the session; mark it completed.
A payout is paid	Gross amount, tax deducted, net amount and bank reference.	Download your statement.

Not sent by email
A client request shared with you appears in your Enquiries tab (and a coordinator may call or message you); accepting an agreement shows in the Agreements tab with a downloadable PDF. Check your dashboard regularly, and keep your email address current. Emails come from IMRTechnologies; if they are missing, check your spam folder.

GUIDELINES

What we ask of every expert

Please	Please do not
Keep your profile accurate and up to date, including availability.	Claim qualifications or vendor relationships you do not hold.
Respond to enquiries and Work Orders promptly.	Contact a client directly to arrange work outside the network.
Treat client information as confidential; use personal data only for the engagement.	Keep or share client data after the engagement unless the law requires it.
Tell us straight away about a conflict of interest, a delay or a data incident (within 72 hours).	Hide problems. Early notice lets us help.
Use your own materials or properly licensed ones.	Copy someone else's course or content, or share your sign-in.

Your data
Your resume, rates, availability and payment details are private and visible only to the staff who need them. Your public profile shows only what you approved. You can withdraw or remove your listing at any time; engagements in progress continue under their Work Orders.

FREQUENTLY ASKED QUESTIONS

Question	Answer
How long does review take?	Reviewers work through applications in order and you get an email at each decision. If you hear nothing for a while, use Dashboard > Support.
Do I have to pay to join?	No. Joining and being listed is free.
Can I offer more than one type of work?	Yes. Each approved type adds its own tab and Service Schedule.
Will clients see my phone or email?	No. We introduce you when an engagement is agreed.
When am I paid?	As stated in your Work Order, after the client's payment is received and the payout is approved.
I was not accepted. What now?	Read the note, update your profile and resubmit.
Who do I contact?	Dashboard > Support, or reply to the email this guide came with.

Welcome aboard. We look forward to working with you.