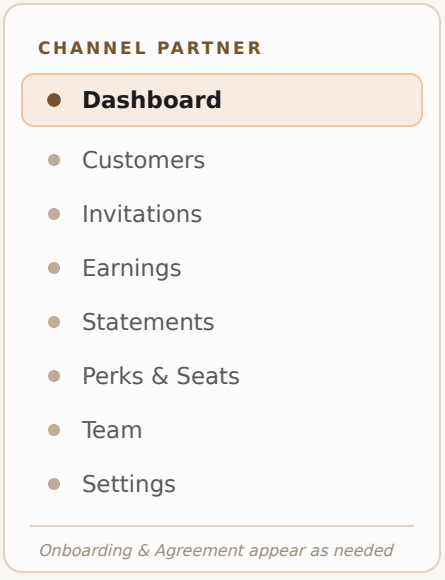
The Channel Partner Portal: An A-Z Guide

Every screen in your SIPSTACK partner workspace, what it does, and how to get paid.

Once you are an approved SIPSTACK channel partner, a dedicated **partner workspace** appears inside Switchboard. It is where you onboard your payout account, invite and manage customers, watch your tier and commissions move in real time, pull printable statements for your accountant, and keep your public directory listing current. This guide walks the whole thing end-to-end, screen by screen, so a brand-new partner can sit down and operate confidently on day one. Everything described here is a live feature of the portal today.

WHERE IT LIVES — THE CHANNEL PARTNER MENU IN SWITCHBOARD



Dashboard `/partner/dashboard` — your at-a-glance overview: managed customers, MRR, tier and commissions.

Customers `/partner/customers` — the roster of organizations under your partner relationship.

Invitations `/partner/invitations` — send activation links to prospects and track who converts.

Earnings `/partner/earnings` — full commission history with filters and CSV export.

Statements `/partner/statements` — printable monthly statements and annual tax documents.

Perks & Seats `/partner/perks` — your complimentary internal-use Nova PBX seats.

Team `/partner/team` — invite teammates to co-manage the workspace.

Settings `/partner/settings` — directory profile, contact, services, coverage and tax identity.

WHO THIS GUIDE IS FOR

Any approved SIPSTACK channel partner — and the teammates they invite. The partner area is gated by partner status, so it only appears once your application is approved. Onboarding and Agreement screens surface automatically when there is an action to take (first-time payout setup, or a new agreement version to re-accept) and step out of the way once you are squared away.

PART ONE

Getting set up

Three screens stand between approval and your first paid commission: connect a **payout account**, accept the **Channel Partner Agreement**, and complete your **profile**. The Dashboard's Getting Started checklist tracks these for you and disappears once you are done.

1 Payout setup `/partner/onboarding`

Connect your bank via our payment processor's secure flow (about five minutes) so commissions can transfer automatically. The page shows a live **Payout account** status — *Not started, In progress, Pending verification, Active,* or *Suspended* — with the right next step for each: **Set up payout account**, **Continue setup**, or **Manage payout account**. If commissions are already accruing while setup is incomplete, a preview shows the pending amount waiting to transfer the moment your account goes Active.

2 Channel Partner Agreement `/partner/agreement`

Your acceptance is versioned. When the agreement is updated, the portal routes you here to review **what changed in this version** and re-accept on behalf of your organization before continuing. The current and previously accepted versions are shown, with a link to open the full agreement. This same status is mirrored at the bottom of Settings, so you always know whether you are current.

3 Settings — profile, services, coverage, tax `/partner/settings`

A tabbed editor across **Profile, Contact, Services, Coverage, Tax,** and **Directory**. Add your logo, display name, tagline and bio; list the services you offer and your specializations; map the cities you cover; and record your tax identity. A persistent identity strip up top shows your tier and rate, partner code, and partner status.

4 Tax identity & self-billing

Record your tax identity on the **Tax** tab. How SIPSTACK handles your tax paperwork depends on **where you are based** (summarized below): the self-billing (RCTI) and annual T4A treatment applies to **Canadian partners only**, and does not apply to US partners, whose tax forms are issued through Stripe. SIPSTACK never collects or stores Social Insurance or Social Security Numbers.

5 Get listed in the partner directory `Settings → Directory`

Opt in to the public **find-a-partner** directory on sipstack.com to receive regional inbound leads. A readiness checklist gates the toggle: upload a logo, write a bio of at least fifty characters, add at least one service and one coverage area, provide a contact method, and reach Silver tier or higher. A live preview card shows exactly how your listing will appear.

TAX PAPERWORK DEPENDS ON WHERE YOU ARE BASED

Canada RCTI & T4A APPLY

- **GST/HST:** record your registration on the Tax tab.
- **Self-billing (RCTI):** SIPSTACK issues a recipient-created tax invoice, so you do not invoice us.
- **Annual T4A (Box 048):** issued each filing season under Statements.
- **Small suppliers:** unregistered partners are paid pre-tax.

United States NOT APPLICABLE

- **No RCTI, no T4A:** the Canadian self-billing model does not apply to you.
- **Tax forms via Stripe:** any required forms are issued through Stripe, our payout provider.
- **Tax tab:** nothing to configure for US self-billing.

Region is set by your partner profile. SIPSTACK never collects or stores Social Insurance or Social Security Numbers.

PART TWO

Bringing customers on

New business starts on **Invitations**; everything you already manage lives on **Customers**; and the **Dashboard** rolls it all into one view of the health of your book.

6 Invitations — turn prospects into customers `/partner/invitations`

Use **Send invite** to email a prospect a branded activation link. The dialog collects company name, contact name, email and an optional personal message, and shows a live preview of the exact email they will receive (subject: “You've been invited to SIPSTACK by [your name]”). Links expire thirty days after send. The table tracks each invite's **Prospect, Status** (*Pending, Activated, Expired*), **Sent** and **Expires** dates, with a one-click **Resend** on anything still pending.

7 Customers — your managed roster `/partner/customers`

Every organization under your partner relationship, with a quick carousel of the most recently linked. The table shows each **Customer** (name and billing email), org **Status**, managed-**Link** status, country, and date linked. **Manage** drops you straight into that customer's workspace (their users and configuration) under your partner scope — so you can support them without leaving the portal. Net-new outreach stays on Invitations; this page is for the book you already hold.

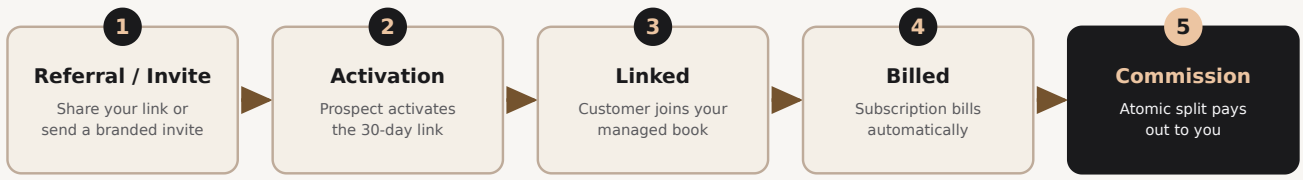
8 Dashboard — the whole book on one screen `/partner/dashboard`

Five headline cards: **Managed customers, Managed MRR, Current tier** (with your rate), **Next payout,** and **Pending commissions.** Below them, a tier-ratchet progress strip shows how far you are from the next tier, your internal-use seat entitlement and utilization, your shareable **referral link** with click count, your payout-account status, and a commission summary — **Total earned, Pending,** and **Transferred** — each linking deeper into Earnings.

THE TIER RATCHET

Your commission rate is set by a tier that recomputes quarterly from the aggregate monthly recurring revenue of the customers you manage — the more you grow your book, the higher your rate ratchets, and it applies to every managed subscription. Your live tier, rate and progress to the next tier are always shown on the Dashboard; the figures on the next page reflect the program at publication and the in-portal values govern.

THE PARTNER EARNINGS LIFECYCLE



Every managed subscription follows the same path. You bring the customer in, SIPSTACK bills them, and your commission splits out automatically at billing time. There is no partner-side invoicing at any step.

PART THREE

Getting paid

Commissions split automatically at billing time and flow to your bank on your payout provider's schedule — no partner-side invoicing, no monthly reconciliation. **Earnings** shows every line; **Statements** gives your accountant printable records; **Perks & Seats** and **Team** round out what your tier unlocks.

TIER	RATE	REACHED AT (AGGREGATE MANAGED MRR)	INTERNAL-USE SEAT PERK
Bronze	**15%**	$0	1 Nova Core seat (30 days after first activation)
Silver	**20%**	$3,000	5 Nova Core seats
Gold	**24%**	$12,000	25 Nova Pro seats
Platinum	**27%**	$35,000	50 Nova Ultra seats
Diamond	**Custom**	$75,000	Enhanced commission rate in lieu of seats

Reflects the program structure at publication; your live tier, rate, thresholds and seat entitlement are always shown in-portal and govern.

9 Earnings — every commission, fully traceable `/partner/earnings`

Headline cards for **Total earned, Pending, Transferred** and **Current tier.** Filter the ledger by status, drill into a per-customer breakdown, or export the filtered view to CSV. Each row opens a detail sheet with the customer charge, the tier and rate applied, your commission, and the underlying Stripe references (transfer, payment intent, invoice). Commission states:

Pending · **Transferred** · **Frozen** · **Clawback** · **Failed**

Pending is awaiting the customer's payment to clear; Frozen means the underlying charge is under dispute; Clawback reverses a commission (refund, lost dispute, churn inside the first 90 days, or an admin adjustment), with the reason shown on the row.

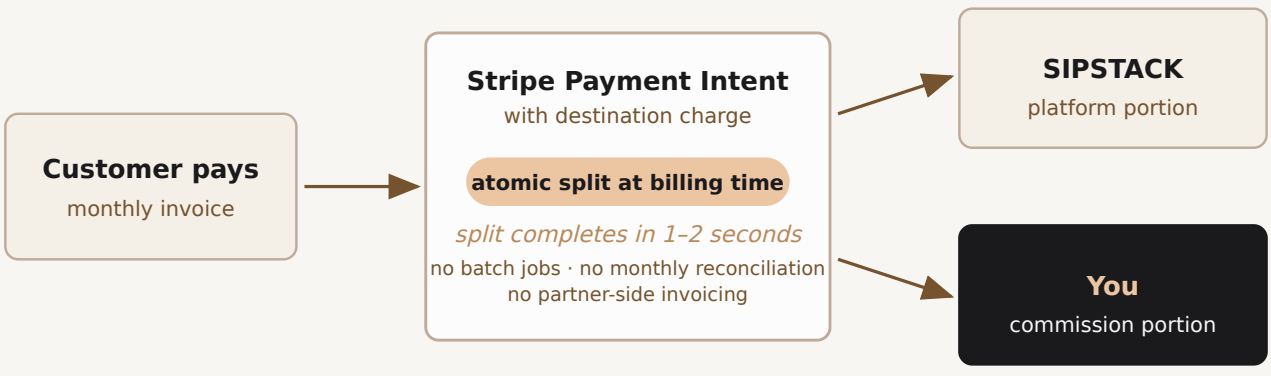
10 Statements & tax documents `/partner/statements`

A monthly statement is generated automatically from your settled commission ledger — each with a statement number and a **Total earned**, opening to a print-ready detail page (parties, per-customer commission table, payouts, and any tax invoices) you can save as PDF for your finance team. Canadian partners also receive an annual **T4A (Box 048)** here each filing season; US partners' tax forms come through Stripe.

11 Perks & Seats and Team `/partner/perks · /partner/team`

Perks & Seats shows the complimentary Nova PBX seats your tier unlocks for your own team's internal use (non-transferable, non-resellable), with a utilization bar and quick links to set up your PBX. **Team** lets the owner invite teammates to co-manage the workspace — each with an *Owner* or *Admin* role and an *Active / Pending / Revoked* status — within the admin-seat budget set by your tier. Access can be revoked, and re-granted, at any time.

GETTING PAID: THE ATOMIC COMMISSION SPLIT



The customer's payment splits at billing time: SIPSTACK keeps the platform portion and your commission routes to your connected account in the same transaction. The split completes in 1 to 2 seconds; funds reach your bank on the standard payout cadence, typically the next business day for US-based connected accounts.

QUICK REFERENCE

The portal, A to Z

A fast lookup for the terms and screens you will meet across the partner workspace.

A Agreement — the versioned Channel Partner Agreement; the portal prompts re-acceptance when it changes.

C Customers — your managed roster; *Manage* opens a customer's workspace under your partner scope.

C Clawback — a reversed commission (refund, lost dispute, early churn, admin adjustment); reason shown on the row.

D Dashboard — one-screen overview of customers, MRR, tier, payout and commissions.

D Directory — opt-in public find-a-partner listing that routes regional inbound leads to you.

E Earnings — full commission history with status filters, per-customer breakdown, CSV export and Stripe references.

F Frozen — a commission held while its underlying charge is under dispute; most resolve favorably.

G GST/HST — Canadian tax registration recorded on the Tax tab; drives the self-billing (RCTI) treatment.

I Invitations — branded activation links to prospects; 30-day expiry, with status tracking and resend.

M Managed MRR — aggregate monthly recurring revenue of your book; drives the tier ratchet.

O Onboarding — payout-account setup via the secure payment-processor flow; required before transfers.

P Payout account — your connected bank; states run Not started → In progress → Pending → Active.

P Perks & Seats — complimentary internal-use Nova seats unlocked by your tier; non-transferable.

R RCTI — recipient-created tax invoice; SIPSTACK's self-billing model for registered Canadian partners (Canada only, not US).

S Statements — automatic monthly statements (printable) plus annual tax documents.

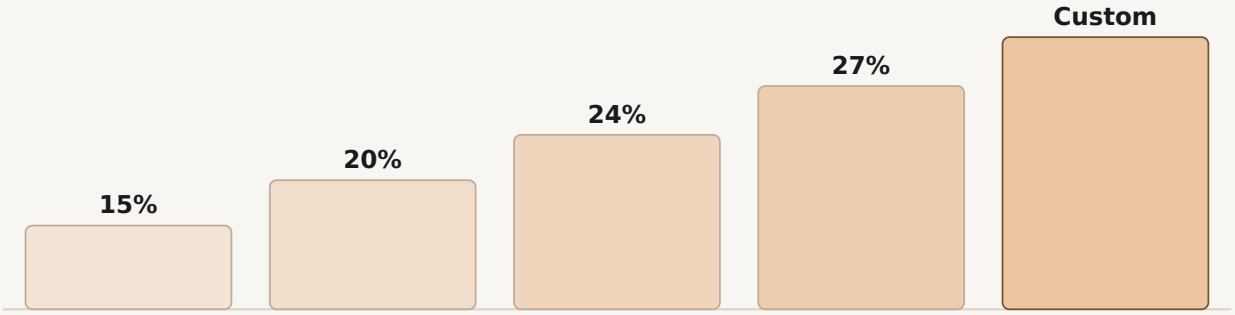
S Settings — profile, contact, services, coverage, tax and directory, plus agreement status.

T Team — invite Owner/Admin teammates within your tier's admin-seat budget; revoke any time.

T Tier ratchet — quarterly recompute of your tier and rate from aggregate managed MRR.

T Transferred — a commission paid to your connected account, settling to your bank on the standard cadence.

THE TIER LADDER: YOUR RATE RATCHETS AS YOUR BOOK GROWS



Your rate rises with the aggregate monthly recurring revenue of the customers you manage, recomputed quarterly. The rate applies to every managed subscription. Tiers shown reflect the program at publication; your live tier and rate always govern in-portal.

Your workspace is waiting inside Switchboard.

Sign in, open the Channel Partner menu, and follow the Getting Started checklist. Not yet a partner? Apply in minutes and the portal unlocks on approval.

sipstack.com/partners · partners@sipstack.com

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