Research Exchange Training Guide

This training guide is designed to provide detailed instructions and best practices for Trusted Agency Partners ("Partners") on the effective use of the Research Exchange platform (“platform”) to achieve their customers’ market research objectives. See the Research Exchange Operations Guide for a deep dive into the conceptual framework for running a successful research project.

Research Exchange overview

The Research Exchange platform is a comprehensive UX research environment designed to manage the entire research lifecycle, from participant recruitment to data analysis. It supports two core data capture methods for various research questions, all organized within customizable **Projects** inside a shared **Workspace**.

Core data capture methods

- **Surveys:** For collecting structured, asynchronous, quantitative feedback, screening, and large-sample data. The platform features an AI-assisted survey engine and full conditional logic.
- **Evaluations:** For unmoderated, task-based usability testing. Participants record their screen and camera as they complete defined tasks. This method is ideal for behavioral observation and task completion analysis.

Key concepts

Term	Definition
Capture method	A specific research instrument within a project. Each type (survey, evaluation) has its own creation flow, dashboard, and data review experience. Multiple capture methods within a project are called a capture series.
Evaluation	Evaluations enable participants to complete unmoderated activities across a single session or longitudinally. Each evaluation has instructions, and participants can record their screen and camera while completing them.
Participant funnel	A structured funnel that ensures participants meet your criteria and have completed any required verification steps (screener survey, location

	check, ID verification, document signatures, language verification, custom verifications) before they access your capture methods.
Project	A container for a single research effort and a list of enrolled participants. Holds one or more capture methods (surveys, evaluations, etc.). Has its own team roles and visibility settings.
Survey	A questionnaire that lets you collect structured responses from participants asynchronously. The SurveyJS editor gives you access to a full range of question types, conditional logic, and validation rules.
Workspace	A shared environment for your team. Controls who can discover and join your research organization. Contains multiple projects.

The platform's core function is to seamlessly connect and facilitate collaboration between three key stakeholder groups:

- **Customers**: These entities represent organizations who possess both the necessary research budget and critical, unanswered research questions about their products, services, or target markets. They come to Pulse Labs seeking expert assistance to define and execute their research agendas.
- **Agency Partners**: This group consists of trusted, vetted organizations who bring specialized expertise, methodologies, and professional services in various domains of research (e.g., UX design, market strategy, data analysis). Partners leverage the platform to discover new client opportunities, manage research projects, and access high-quality participants.
- **Participants (Pulse Voices)**: These are the high-quality, pre-screened individuals who form the indispensable human component of the research. Known as Pulse Voices, they are the end-users and consumers whose feedback, behaviors, and insights are captured to answer the Customers' critical business questions, ensuring research findings are grounded in real-world perspectives.

The platform serves as the central hub where these three groups converge, enabling efficient project scoping, secure data collection, and ultimately, the delivery of impactful, actionable research results. For additional information, refer to the Research Exchange operations Guide.

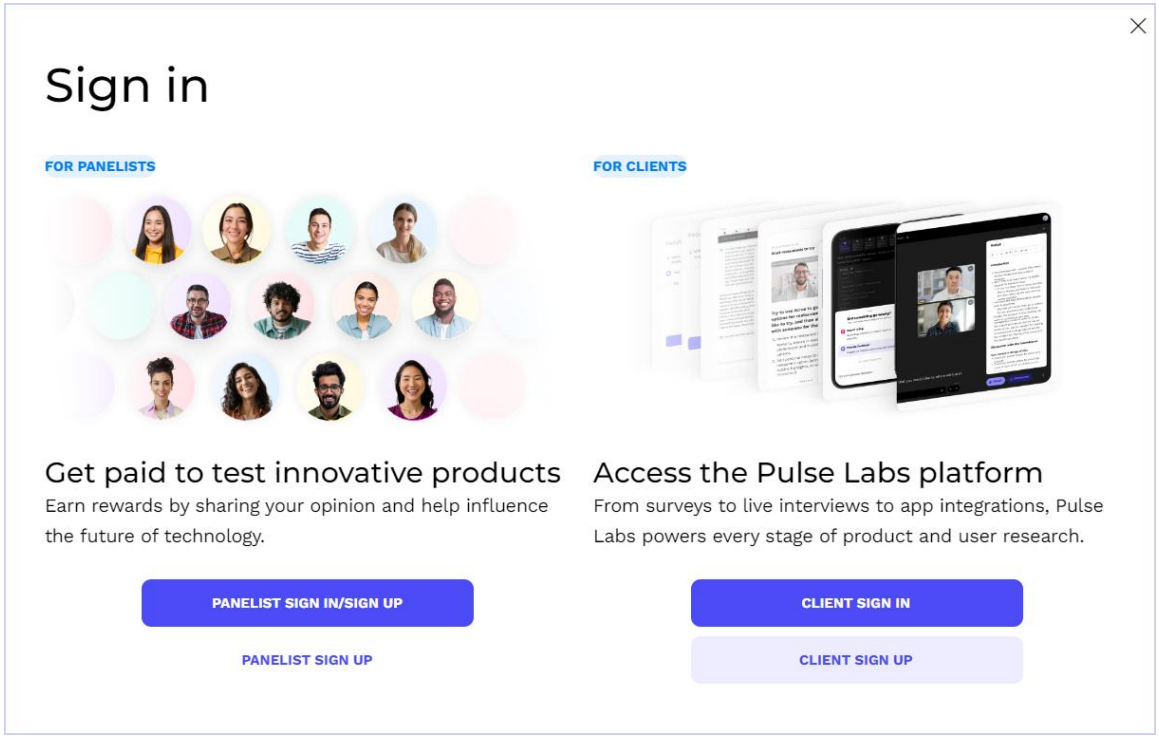
Getting started: Access and setup

This section covers initial account creation, platform access, and setting up the workspace.

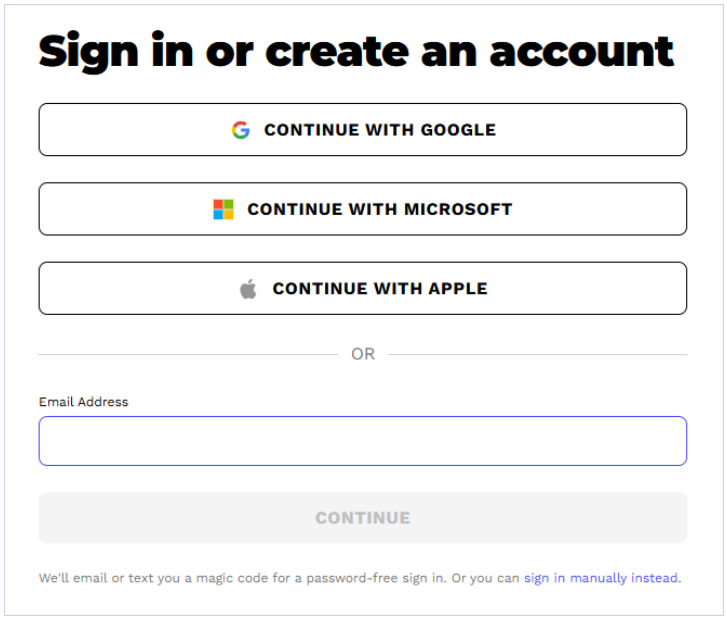
Create a Pulse Lab account

This is the first step for any new user who does not have an existing account.

1. Go to pulselabs.ai and select **Sign In/Sign Up**, and then select **Client Sign Up**.

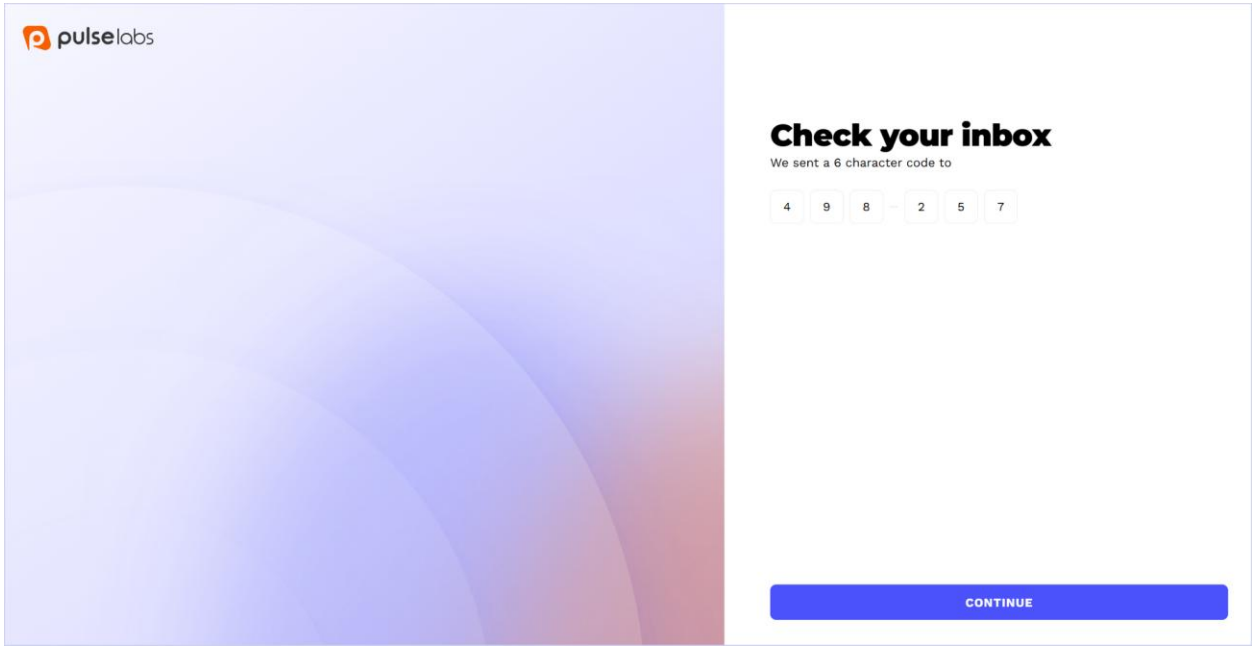


2. Select one of the SSO options or enter your business email address, and then select **Continue**.

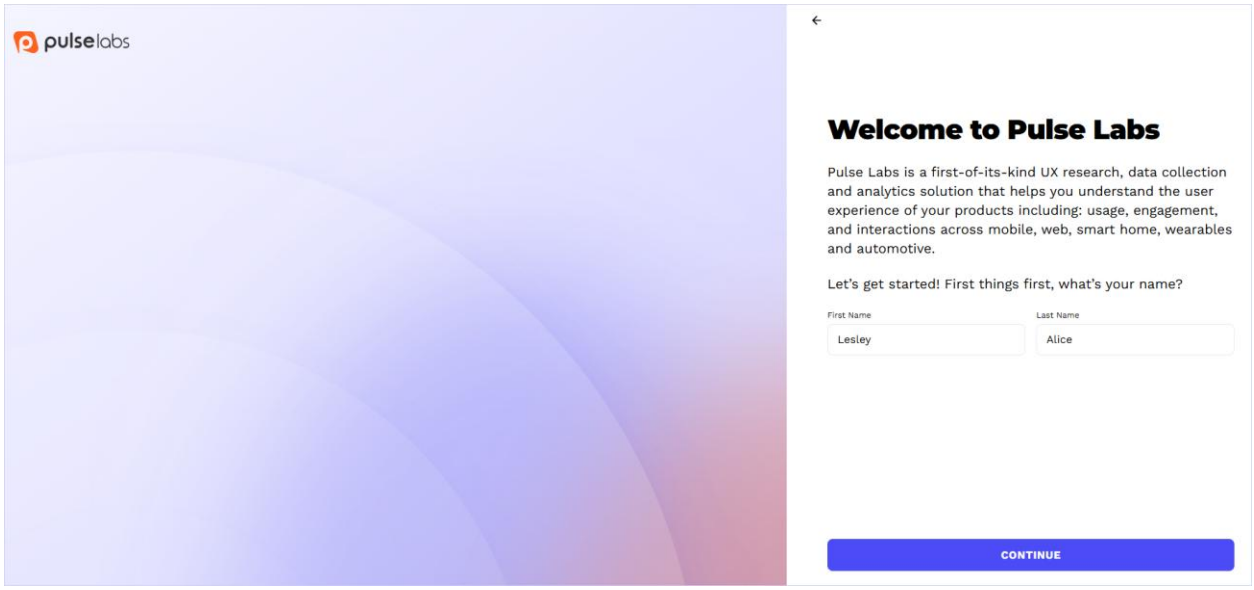


A Passwordless Login email is sent with a verification code to verify your email address.

3. Enter the six-digit code in the browser as requested. Select **Continue**.

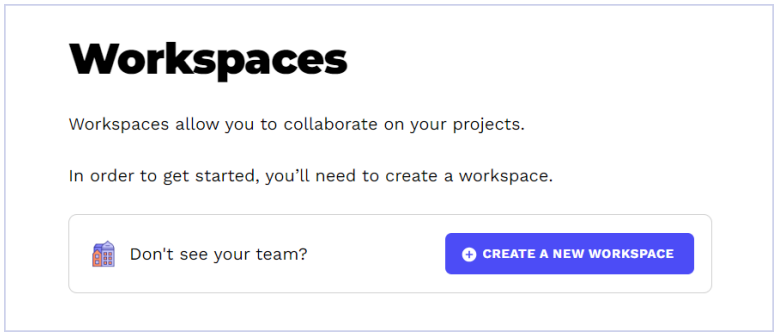


4. Type your first and last name, and then select **Continue**.



5. Check the boxes to acknowledge the Terms of Service and Privacy Policy, and to receive marketing emails (optional) from Pulse Labs. Select **Accept**.

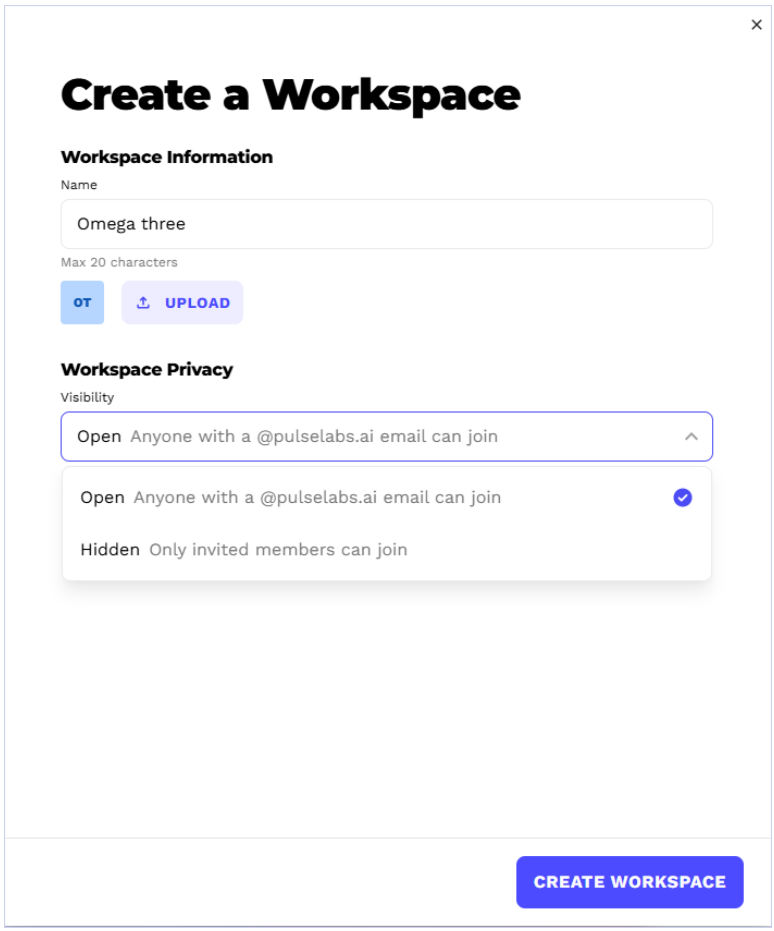
   The initial Workspaces page displays.



Create a workspace

A workspace is the primary collaborative area where all related research projects are housed. Creating a workspace is performed by the Agency Partner or account owner who is responsible for managing the customer's research projects on the platform.

1. Select **Create a New Workspace**.

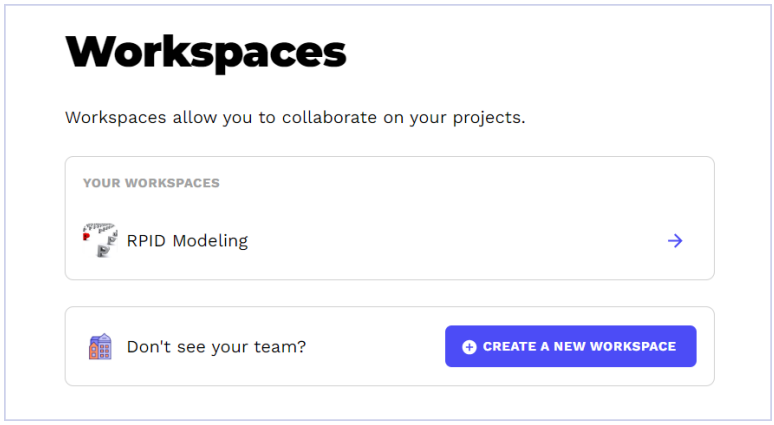


2. Enter a name for the workspace and upload an avatar or logo (optional). There is no maximum number of workspaces.

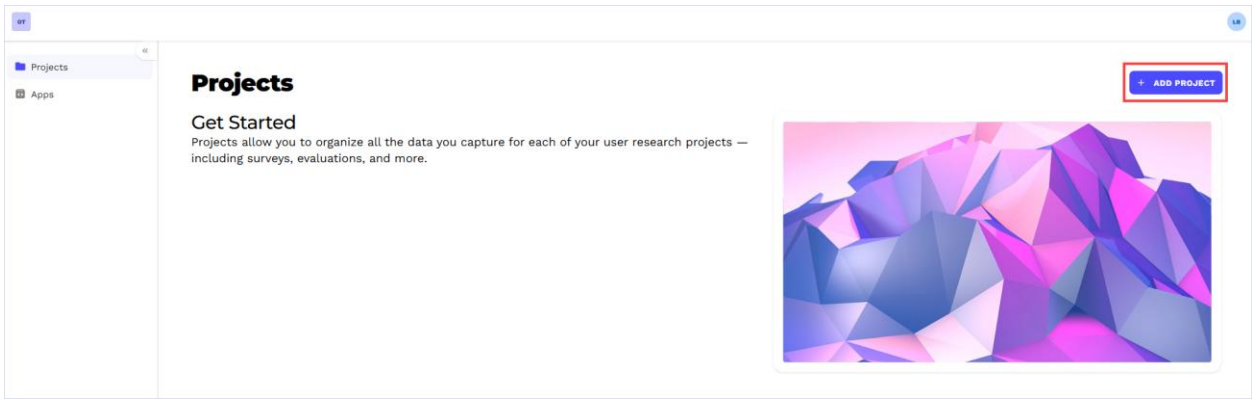
Suggested examples of workspace names are:

- [Agency *Partner name*] + [*Client name*], or
- [*Client name*], or
- [*Client name*] + [*Product/Service/Target Market name*]

3. Select **Create workspace**.



4. Select the arrow for your newly created workspace, and accept the terms of use and privacy policy. The Projects screen is displayed.

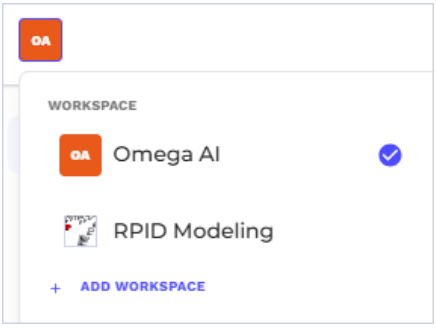


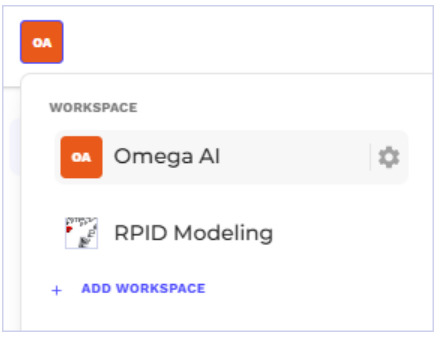
Invite workspace members

Workspace members can include not only researchers, but also stakeholders, collaborators, and survey testers.

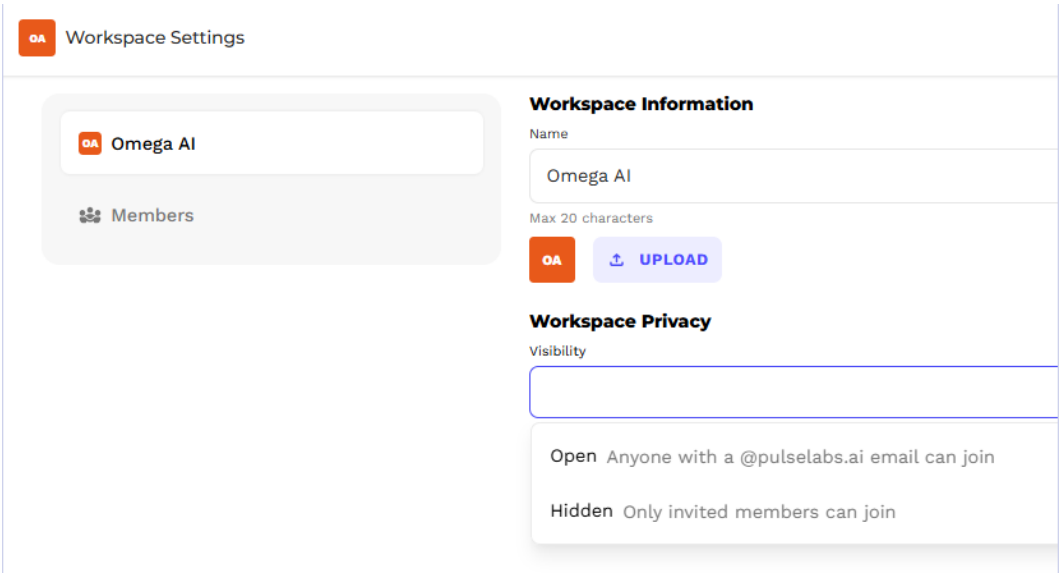
Access workspace settings

1. Select the workspace icon in the upper left corner and then hover over the workspace name. The checkmark changes the gear icon.





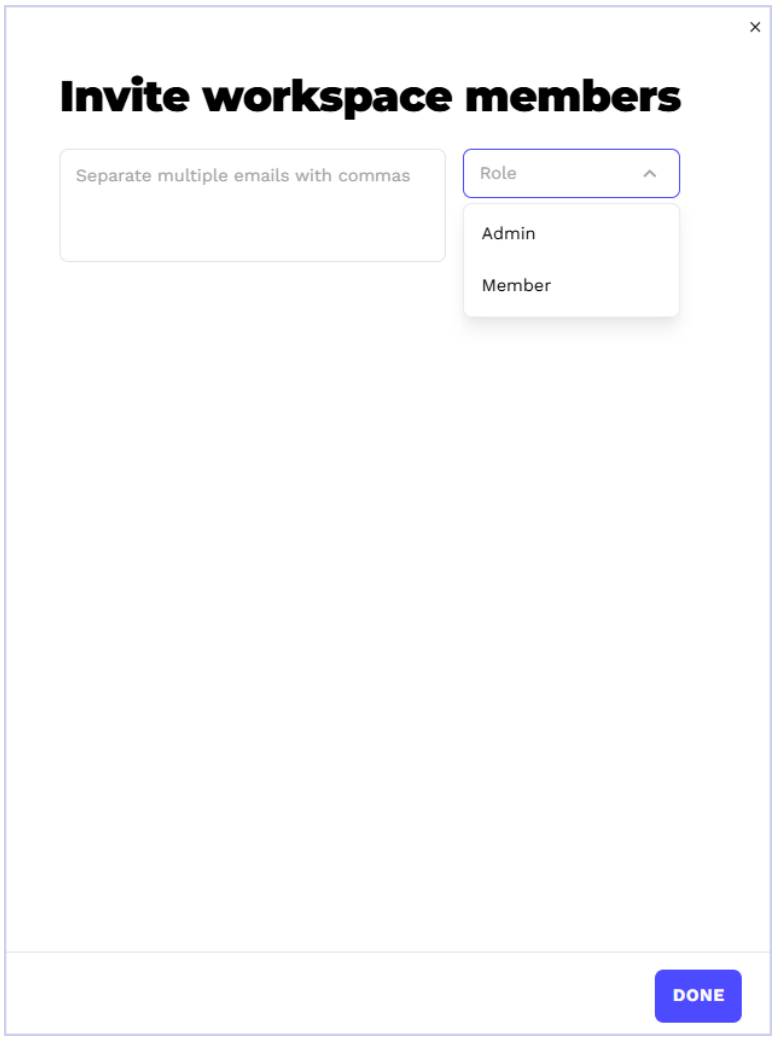
2. Select the gear icon to display the Workspace Settings page.
3. Modify the workspace name, change the icon, or change the workspace's visibility.



4. Refresh the platform to make the changes effective.

Invite members

1. On the Workspace Settings page, select **Members** and then select **Invite**.



2. Enter email addresses separated by commas to invite multiple workspace members.

> Workspace members are currently limited to the email domain of the workspace owner's organization.

3. Select the **Member** role, and then select **Add to Workspace**.

> The Admin role is typically held by the person who created the workspace. A workspace can have more than one Admin as backup.

4. Select **Done** to view your updated member list.
5. To exit Workspace Settings, hover over the workspace icon to open the left side panel, and then select **Projects**.

Remove a member

> ⚠ **Removing a workspace member automatically removes them from all projects within the workspace.**

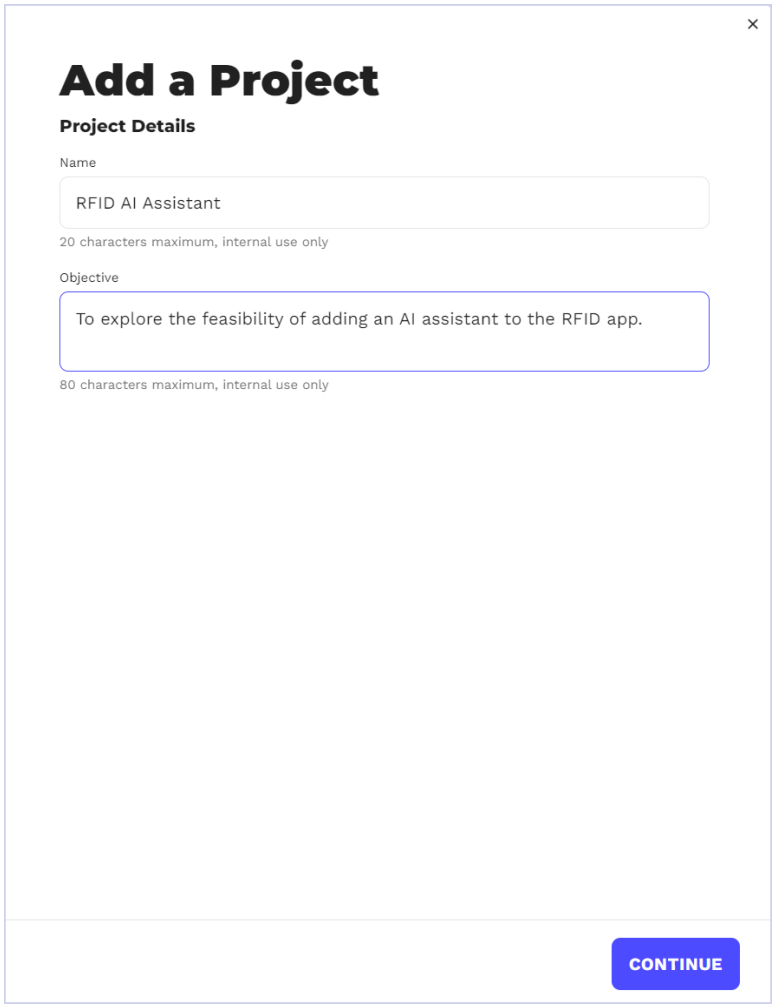
1. To remove a member from your workspace, select the **Role** dropdown and then select **Remove Access**.
2. On the popup window, select **Remove**. The member is deleted immediately.

Note: IF you are removing a workspace member who is also a Project owner, you will be prompted to select a replacement.

Add a project

This section details the primary actions you'll perform to set up and manage research projects on behalf of your customers. Every data capture method is managed within a project.

1. On the Projects dashboard, select **Add Project**.
2. Enter the name of the project and a brief objective description, and select **Continue**.



3. On the Next Steps page, select **Add Capture Series** or **Add Participants** to continue setting up the project.

