

QuickBooks Connected Services Commissions Manager

What is Commissions Manager?

Commissions Manager is a quick, flexible and easy way for QuickBooks users to manage commissions for their sales reps and was developed for QuickBooks Pro, Premier, and ES users who would otherwise have used complicated Excel spreadsheets or expensive software to manage their sales commissions.

What are the Features & Benefits?

➤ Review new invoices

- View all of your new invoices per sales rep
- Filter paid vs. unpaid invoices to only see and pay the invoices you care about
- Set default commissions percentages for each rep
- View each invoice's details and apply commissions on a sales rep, invoice or line item level
- Set certain pesky items like sales tax and shipping to 0% to make them non-commissionable
- Apply a bonus on any invoice

➤ Keep track of commissions payable

- Move your invoices to "Ready to Pay" once you have set their commissions to quickly see how much commission you owe your sales reps
- Easily keep track of this fluctuating payable to better manage your cash flow before payday

➤ Reference paid commissions

- Move your invoices to Paid History once you have paid them to keep track of past commissions paid
- All invoices moved to Paid History will be grouped into "paychecks" by the date they were moved to Paid History so you can easily keep track of past commissions payments
- View paycheck, invoice and even invoice details for each paid invoice
- Print a PDF summary or details for each paycheck to include with your pay stub to your sales reps

➤ Sales Rep View (requires upgrade)

- Increase transparency with your sales reps inviting them to view their invoice and commission history
- Sales reps can only view their own data, and cannot edit anything so you control the commissions
- Save time debating commissions at the end of the pay period as your sales reps can easily keep track of their sales and commissions throughout the pay period
- Get paid faster - when your sales reps see they could be earning more commissions by getting your customers to pay you faster

➤ Admin View (1 included with base SKU, more with upgraded SKU's)

- By upgrading to more users you can invite multiple admins to keep track of and calculate commissions

What are some good probing questions?

- What are some of the issues you currently face when it comes to tracking commissions?
- What are your current workflows for managing commissions?
- How many people are currently involved with tracking and calculating commissions?
- How would it help you if your sales reps could have better visibility to their commissions throughout the month?

System Requirements

- Internet access required, high speed internet access optimal
- Requires use of QuickBooks Pro, Premier or Enterprise 2011, and all system requirements for those versions of QuickBooks apply

Frequently Asked Questions

How do customers activate the service?

Customers will receive a confirmation e-mail with a link. Clicking on the link will take them to the setup process for ICM.

What if a customer wants to cancel?

Customers receive a 30 day free trial but can cancel at anytime by calling 800-450-8475.

How does a customer receive support?

Customers can receive support by calling 800-450-8475.

Are there any limitations?

Intuit Commissions Manager works on any internet enabled browser, must have internet access.

How do I enter the order?

Order entry in CRIS will be source code driven. Source codes can be found on Atlas, under "Offers" under "Connected Services." The service will show up in CRIS under *Contracts not Agreements*.

What if a customer wants multiple users?

Intuit Commissions Manager has 3 SKUs available:

- A. 1 user – admin only
- B. 3 user – includes 1 admin and you can choose if you want the other 2 users to be admins or sales reps
- C. 25 user – includes 1 admin and you can choose if you want the other 24 users to be admins or sales reps

Are there any other steps customers need to follow after the sale?

They just need to follow the link in their confirmation e-mail to get started.

Where do I find information on the latest features and functionality in Intuit Commissions Manager?

Agents can visit <http://teamrooms.reno.intuit.com/servicedelivery/SBG/default.aspx> or Atlas to stay updated on the newest features. Additional communication will be provided via e-mail as needed.

Since this is a new service, where can I direct customer feedback and questions?

All non-urgent customer questions and feedback can be e-mailed to Commissions@Intuit.com. Responses will be provided within 48 hours.

Can you explain the 30 day free trial?

Agents will use a source code in CRIS to set up the free trial. When a customer signs up for the 30 day free trial, they will need to provide a credit card number. The card will not be charged until the end of the 30 day free trial. The customer will need to call if they wish to cancel the service.