



# Member Guide



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### Introduction

Becoming a QuickBooks Solution Provider (“QSP”) means you have chosen to work with a company that has been focused on simplifying the lives of small business owners for over 25 years. At Intuit, we rely on our Solution Providers to expand on our ability to provide for our mutual customers through their value-added services, excellent support, and focused training.

Intuit is here to support Solutions Providers with competitive compensation, training, and marketing tools. We have various levels of benefits and compensation based on your level of commitment, revenue, and capabilities. You can choose to focus your business on one product or the entire QuickBooks ecosystem.

This member guide outlines the current benefits available to QuickBooks Solution Providers effective as of August 1, 2018. Along with the Intuit Reseller Program Agreement, these terms apply for all activities going forward and supersede all other previous benefits.

## Program Overview

QuickBooks Solution Providers have the opportunity to promote the entire QuickBooks ecosystem to their customers and prospects. We expect Solution Providers to be well-versed in the product line up so they are able to offer the best solution for specific customer needs. To support those efforts, there are a variety of trainings available on the University portal and through the QuickBooks ProAdvisor Program (access to ProAdvisor training portal requires active, separately paid ProAdvisor subscription).

The QuickBooks Solution Provider Program applies to the following Intuit product lines:

- QuickBooks Accounting Solutions
  - QuickBooks Desktop Enterprise
  - QuickBooks Enterprise Hosted Bundles or Add Ons
  - QuickBooks Desktop Pro, Mac, and Premier
  - QuickBooks Desktop Plus
  - QuickBooks Accountant
  - QuickBooks Online Simple Start, Essentials, Plus, Advanced<sup>1</sup>
- QuickBooks Desktop Point of Sale
  - Software: Basic, Pro, Multi-Store
  - Hardware Peripherals
- QuickBooks Payroll Solutions
  - QuickBooks Online Payroll
  - QuickBooks Desktop Payroll
  - QuickBooks Full Service Payroll
  - Assisted Payroll
  - Intuit Full Service Payroll
- QuickBooks Payments
- Intuit Field Service Management
- Check and Supplies

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<sup>1</sup> QuickBooks Online Advanced is available through the QuickBooks Solution Provider program beginning November 1, 2018.

## Tiers

The QuickBooks Solution Provider Program is made up of five tiers:

- Elite
- Executive
- Strategic
- Advanced<sup>2</sup>
- Member

Criteria	Elite	Executive	Strategic	Advanced	Member
Sales Threshold	\$1M	\$500K	\$250K	\$30K	Active Sales

## Program Requirements

You've worked hard to earn the status of QuickBooks Solution Provider in good standing. To maintain this status and the benefits that come with it, you'll need to maintain a few important performance metrics and certifications throughout the year. Below is a summary of the major requirements. Please reach out to your Channel Account Manager (CAM) if you need more details on select requirements.

### QuickBooks Solution Provider Agreement

All Solution Providers are required to accept the terms of the Agreement and comply with all of its terms. Once your firm has been approved, your Master QuickBase account will display a link to review and accept the terms of the Agreement.

### Sales Minimums - Intuit Product Licenses and Subscriptions

Each tier has a minimum annual sales volume noted above. A new Solution Provider may qualify for tiers immediately upon entering the Program by demonstrating a reasonable ability to achieve the required net sales volume and other requirements

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<sup>2</sup> Effective November 1, 2018, Solution Providers who achieve between \$100k and \$250k in sales at the time of a tier reset will be considered "Advanced Plus" with all the benefits associated with the Advanced tier with an additional badge to denote the Advanced Plus status.

during the upcoming fiscal year, which may be based upon a documented business plan. Please work with your CAM to establish your eligibility.

Minimum sales volume achievement is periodically assessed. If you fail to meet the threshold at the given assessment, your tier will be immediately and prospectively adjusted to the tier aligned with your sales and capabilities. You are eligible to requalify for a higher tier at the next assessment date if the minimum annual net sales volume threshold is met during the previous 12 months and you can demonstrate the reasonable ability to achieve the minimum annual net sales volume threshold during the upcoming period. To ensure ongoing compliance with this requirement, QSPs can view real time sales information at any time by visiting the Master QuickBase.

At each assessment date, a QSP participant must demonstrate a reasonable ability to achieve the required net sales volume of their tier during the upcoming fiscal year, which may be based upon a combination of documented business plan and historical sales activity. Please work with your Channel Account Manager to establish your eligibility.

### Certification

The sale and support of advanced business and financial software licenses and solutions requires a solid skill set that enables you to work as a true consultant to your customers and ensure the best architected solutions for their needs.

Solution Providers are required to maintain at least one (1) product-certified individual on staff per location in at least one of the Intuit solution categories listed below. Further, a QSP participant will only be granted authorization for additional solution categories once they have a documented product-certified individual on staff. Should your product-certified employee leave your organization, a sixty-day grace period will be allowed to return to certification compliance.

Current solution categories:

- QuickBooks Enterprise Solutions
- QuickBooks Point of Sale Solutions

Certification may be achieved either through successful completion of the product certification by an existing employee or by hiring a currently-certified individual.

### Product Installation and Returns

Intuit desktop software must be installed at an end-user site within fifteen (15) days from the date that it is delivered by the Solution Provider by disc or tangible media, distributed through electronic means, or made accessible from the Web. If customer is unable to accommodate product installation within fifteen days, the Solution Provider must notify the customer that the start date for any Intuit support or professional services plan begins on the Solution Provider's software order date regardless of when it is installed. (refer to 9.1.2 of the Intuit Reseller Agreement)

The guidelines for product returns are as follows:

- Intuit accepts returns of individual product so long as it is within 60 days
- Intuit does not provide returns/refunds on bulk orders where product licenses haven't been sold to an end user or aren't returned from an end-user within 60 days of the original bulk order license purchase
- QSP participants should refund customers who return products to them so long as it is within 60 days of Solutions Provider's original product license purchase
- Product licenses purchased during the migration period (60 days prior to the launch of a new product) can be migrated to the new version when it becomes available

### Program Status Audits & Evaluations

The QuickBooks Solution Provider Program is designed to provide structure and recognition based on skills and performance. Program status will be evaluated from time to time to maintain program integrity. Intuit reserves the right to audit

performance against current program requirements and customer satisfaction at any time.

Solution Providers will be notified before the end of the quarter if they are not on target to meet tier criteria. Your CAM can help you develop a specific set of performance objectives to help you maintain your tier at the next reset. If you succeed in meeting the established objectives, there will be no change in program status. Failure to meet the objectives will result in a loss of some or all program benefits including but not limited to a downgrade in program status.

### Compensation

Solution Providers have access to a wide range of Intuit solutions to refer and offer along with your value-added services. In order to reward you for your efforts, several compensation benefits exist. These vary depending on whether you are selling QuickBooks software licenses or hardware bundles or referring customers to Intuit services like Payroll or Payments which generate monthly residuals. Solution Providers must comply with documented certification requirements in order to engage in referrals or sell Intuit product licenses and enjoy a range of compensation benefits.

## QuickBooks Solution Provider Member Guide

Compensation	Elite, Executive, Strategic, Advanced*	Member
QuickBooks Enterprise New Users and Upgrades in year 1	35% Commission	25% Commission
QuickBooks Enterprise Subscription Renewal	10% Commission	5% Commission
Field Service Management Licenses	25% Residual	20% Commission
QuickBooks Enterprise Hosted Bundle/Hosting Add-Ons	28% Residual	28% Residual
QuickBooks Desktop Licenses (Pro, Premier, Mac, Acct)	Up to 35% Discount	Up to 30% Discount
QuickBooks Pro Plus & Premier Plus Subscriptions	20% Commission (for initial subscription)	20% Commission (for initial subscription)
QuickBooks Online	\$50 Bounty Simple Start \$150 Bounty Essentials & Plus \$300 Advanced*	\$50 Bounty Simple Start \$150 Bounty Essentials & Plus
Intuit Payments Referrals	40% Profit Share	35% Profit Share
Intuit Payroll Referrals		
Assisted Payroll	20% Residual	15% Residual
Intuit Full Service Payroll	25% Residual	20% Residual
QuickBooks Online Full Service Payroll	\$300 Bounty	\$300 Bounty
Intuit Payroll (Enhanced)	\$25 Referral	25% Discount
QuickBooks POS New and Upgrade Software Licenses	40% Commission	10% Commission
POS Peripherals & Supplies	Up to 20% Discount	Up to 20% Discount
ProAdvisor Desktop Membership	\$25 Bounty	
Secure Plus Checks and Tax Forms (checks & supplies)	35% Commission	35% Commission
Quarterly Rebates	3%/5%/7%	
Lead Protection	20% of Net Sale	
Marketing Funds	3% Co-Op	Managed by Distribution

Compensation benefits are subject to change.

\*QuickBooks Online Advanced available beginning November 1, 2018.

Commission percentages are based on the **net sale** amounts received by Intuit.

Margin is a reduced cost to QSP participant based on MSRP or MAP (minimum advertised price) as defined in the published price sheet.

Commissions for monthly subscriptions are paid based on the annualized net sales, equal to the recurring amount of the second month's payment x 11 (months) plus the first month's billed amount.

All commissions are paid twice a month. Effective November 1, 2018, all commissions are paid once a month on a calendar month basis.

Resellers have the right to review and dispute payments within a 12 month rolling timeframe. Any requests that fall outside of a rolling 12 month period will not be reviewed.

Various incentives and contests are run on a quarterly basis and will be announced as they are rolled out. You will be required to abide by contest rules or incentive thresholds in order to receive a payout.

Customers who subscribe to QuickBooks Online through the QuickBooks Solution Provider Program are not able to transfer their QuickBooks Online subscription to any other pricing model, e.g. Wholesale Billing.

Commissions are only paid to a primary Solution Provider. Those QSP participants who have their own affiliate programs need to manage and pay members of those programs themselves - as well as ensure that all of their affiliates comply with all applicable terms, laws and policies. If a secondary partner of a Solution Provider chooses to leave an affiliate program, all QuickBooks customers will remain with the primary Solution Provider.

The Definitions at the end of the Member Guide give scenarios for QSP participants to understand when commissions will be paid or adjusted.

### Rebate Program

	Tier 1	Tier 2	Tier 3
Quarterly Sales Target	\$12,500 to \$24,999	\$25,000 to \$49,999	\$50,000 and above
Quarterly Incremental Rebate	3%	5%	7%

Solution Providers in good standing are eligible to participate in quarterly performance-based rebates which serves as a bonus revenue stream.

## QuickBooks Solution Provider Member Guide

These products are eligible for the rebate:

- ✓ QuickBooks Enterprise Solutions – Silver, Gold, and Platinum Subscriptions
- ✓ QuickBooks Point of Sale Desktop software licenses – new software and upgrades
- ✓ QuickBooks Point of Sale Desktop hardware and supplies
- ✓ QuickBooks Desktop Product licenses – including Pro, Mac, and Premier
- ✓ QuickBooks Desktop Plus (Pro Plus/Premier Plus)

Payments residual and Payroll do not count toward target bonuses.

To be eligible for the rebate program, you must be a Solution Provider in good standing. Sales dollars subject to the calculation are based upon quarterly activity, net of discounts and adjustments. Each quarterly calculation begins a new threshold target; sales volume does not rollover to subsequent quarters. Orders placed through distribution must abide by quarterly deadlines in order to receive credit for that quarter. Check with your CAM on quarterly deadline dates.

### Accelerators

	Elite	Executive	Strategic
Quarterly Growth Target	10%	15%	20%
Quarterly Incremental Rebate	5%	4%	3%

Elite Solution Providers are eligible for an additional 5% rebate on net sales over and above their previous year's quarter over quarter sales, once their increase reaches 10%. Only the dollar amount above last year's net sales volume qualifies for the additional rebate. Accelerators will be calculated and paid on a quarterly basis.

Executive Solution Providers are eligible for an additional 4% rebate on net sales over and above their previous year's quarter over quarter sales, once their increase reaches 15%. Only the dollar amount above last year's net sales volume qualifies for the additional rebate. Accelerators will be calculated and paid on a quarterly basis.

Strategic Solution Providers are eligible for an additional 3% rebate on net sales over and above their previous year's quarter over quarter sales, once their increase

reaches 20%. Only the dollar amount above last year's net sales volume qualifies for the additional rebate. Accelerators will be calculated and paid on a quarterly basis.

When looking at quarter over quarter sales using data from the previous year, all sales related to Enterprise Solutions modifications for both the current year and the same quarter last year will be removed from the comparison and the payout.

All discounts, compensations, and incentives are subject to change at any time.

### Solution Provider of Record

Solution Provider of Record (SPOR) is a way for you to be tied to the ongoing relationship with QuickBooks Enterprise customers who have an ES subscription, but did not purchase it directly from you. The SPOR is a way for you to be attached to all future renewal residual or account updates.

The SPOR is only valid for QuickBooks Enterprise and Field Service Manager (FSM) customers.

Customers are required to complete and sign the SPOR document provided by Intuit and indicate that they intend to use the Solution Provider as their primary point of contact for their ES/FSM account. Intuit also reserves the right to reach back out to the customer for Net Promoter scoring and information about their ongoing relationship to the Solution Provider.

SPOR forms must be uploaded into the Master QuickBase before the Solution Provider will be tied to the account.

### Support

#### Channel Account Managers

QuickBooks Solution Providers are assigned a designated Channel Account Manager (CAM). Your CAM is your primary point of contact for all your Solution Provider-related needs.

CAMs are available to work with you on joint business planning, marketing strategies, local training, and other business development activities. They will also participate in joint sales calls with customers or prospects on a case-by-case basis.

#### Technical Support

The work you do with customers will often include the design of a customized solution along with the deployment and implementation of products, in some cases involving complex environments.

We recognize that these complex environments occasionally create challenges, and receiving timely support to resolve issues can be crucial. A support system has been set up for Solution Providers, giving them access to dedicated support via one number: 800-607-7513. Please don't share this number with others.

Single number and QSP queues for each product are behind a simple Interactive Voice Response (IVR) with experienced agents for each product.

Option 1 - QuickBooks Pro, Premier, or Enterprise Solutions

Option 2 - QuickBooks Point of Sale

Option 3 - Payroll Solutions

Option 4 - Payments Solutions

Option 5 - QuickBooks Online

### Communication Programs

The Solution Provider Program offers a wealth of information, features, and benefits for you to take advantage of; however this can also sometimes feel like an overload of information as you're trying to run a thriving business of your own. We offer a customizable set of communications tools ranging from partner conference calls, to information webcasts, email newsletters, a calendar of events, and a library of resources.

### Intuit Systems & Tools

We realize there are times when business questions require a quick answer; therefore, your Intuit Channel Account Manager is backed by several key on-demand resources available to support your day-to-day questions. The Master QuickBase and QSP resource portal are your main links into your online information including the following key features:

- Complete list of your business information on file, services offered, company contacts and roles
- Summary of your orders and a mechanism to request a new order
- Sales performance and rebate eligibility tracking
- Lead registration and lead tracking
- Current product license pricing and promotions
- Links to sales & marketing tools and information
- Co-op request and claims process

### Internal Use Products

The best endorsement of a product is your internal use, and we've made it easy and affordable for you to use a wide range of Intuit small business solutions. What better way to showcase the power of our offerings than to use them yourself.

## QuickBooks Solution Provider Member Guide

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Following is a list of the complementary, not-for-resale (“NFR”) products currently offered to active Elite, Executive, Strategic, and Advanced Solution Providers in good standing. Available products may vary by tier.

- QuickBooks Enterprise Solutions: 10-user Accountant Edition license
- QuickBooks Premier: 1-User Accountant Edition license
- QuickBooks Enhanced Payroll for Accountants (free for first year subscription only, and only for Solution Providers who are qualified accountants)
- QuickBooks Point of Sale Multi-Store license (one license with one seat)

The most current list of QuickBooks Point of Sale demo unit pricing and details and be found on the QSP Price Sheet.

### Training and Certification

Certification training is a requirement of the Solution Provider Program. Some training is available through the University; QuickBooks Online, Point of Sale, and Enterprise Certification must be obtained through the ProAdvisor Program (which requires an active, paid ProAdvisor subscription). Certifications are available for QuickBooks Enterprise Solutions, QuickBooks Point of Sale, QuickBooks Online, and Intuit Field Service Management (certifications managed by Corrigo).

## Leads

### Lead Protection

Intuit respects the relationship between a Solution Provider and your current or prospective customers and has provided a set of methods for you to let us know the customers you are working with.

There are times when the customer still chooses to make their product license purchase directly from Intuit. If this should occur, Intuit will reimburse the QSP member 20% of the net sale of the order up to a maximum payout of \$6,000 per

registered opportunity. Lead protection is offered on QuickBooks Enterprise, QuickBooks Enterprise Hosting, Field Service Management, and QuickBooks Point of Sale. Lead protection will only be honored for one Solution Provider on a first-reported basis should multiple Solution Providers apply for protection on the same opportunity.

A qualified registered opportunity, including a completed opportunity in the Master QuickBase lead referral system along with a customer proposal or quote, must be registered prior to the date of customer order to qualify for lead protection payment. Effective November 1, 2018, Solution Providers must notify Intuit of the lost sale within sixty (60) days of customer license purchase to receive payment.

### Lead Pass

Elite, Executive, Strategic, and Advanced QuickBooks Solution Providers in good standing are eligible to receive leads from Intuit. Leads are distributed based on a number of factors including but not limited to:

- Request for local help
- Vertical or niche market specializations
- Support capabilities

QSPs are required to follow up on leads within two business days. Updates must be made in the QuickBase allowing Intuit to follow the progress of the lead. If leads aren't contacted or the record updated within two business days, the lead will be reassigned. If timely updates aren't made, you will no longer be eligible for the lead pass program.

### Directory Listing

Intuit customers frequently look for assistance in obtaining, installing, and servicing their software and other related solutions, and Intuit wants to make sure these customers can find the help they need. As an Elite, Executive, Strategic, or Advanced

QuickBooks Solution Provider, your main location along with qualifying locations will be listed in a directory designed to help customers find a local expert. Qualifying locations must have an on-site team member with valid software certification.

Each site will only be listed in accordance with the product certification achieved by a team member at that site.

## Marketing

### Co-op Marketing Funds

As a successful Solution Provider, you've worked hard to identify and grow your pipeline to drive sales of Intuit software licenses and related products. The Intuit co-op program has been developed to help fuel your ongoing marketing and business development efforts by funneling a percentage of attributed and qualifying Intuit net sales into a co-op fund.

Funds are calculated on a quarterly basis and may be used in the following quarter based on your approved marketing plan. Below is a schedule of current co-op accrual percentages. Refer to the co-op guidelines for information on how to request and claim funds and put your marketing plans in motion. If you do not use your co-op funds in the quarter immediately after you earned them, you will lose the ability to claim the co-op funds for that quarter.

Co-op Schedule for Qualifying Net Sales Volume	
<b>QuickBooks Enterprise</b>	QuickBooks POS (Hardware & Software Licenses, see Rebate Program for eligible product list)
<b>3%</b>	3%

For Elite Solution Providers, 3% co-op will also be calculated for QuickBooks Pro, QuickBooks Mac, QuickBooks Premier, and QuickBooks Accountant Edition if the

quarterly net qualifying sales of those products reach, at a minimum, the previous year's quarter over quarter net sales.

### Marketing Resources/Tools

Marketing Tools in the form of emails, web plugins (content syndication), social media, and co-branded collateral are available to top tier Solution Providers.

### Branding and Identity

By earning the designation of a QuickBooks Solution Provider, we want to make sure your customers recognize your status. To help you promote your hard earned status we have developed the Solution Provider brand identity including a main program logo and a tiered badges. QSP members are responsible for reviewing and abiding by all brand, badge, logo and trademark guidelines, subject to program terms. Violations may result in immediate termination.

## Marketing Guidelines

### Authorized Services

- You are authorized to provide QuickBooks product knowledge and/or consulting - i.e., helping users to choose, lawfully obtain, install, set up and use the software - in any country, for any country.
- You are not authorized to provide accounting or tax advice except in jurisdictions where you have expertise, state-based professional certification and/or regulatory knowledge.
- Paid phone-based support cannot be the primary focus of your business.
- You are not authorized to provide use of or access to an Intuit Product in an application service provider, online hosting, or other similar arrangement unless you are a participant in Intuit's Hosting Program.

### Minimum Advertised Pricing (MAP) Policy

QuickBooks Solution Providers are required to abide by pricing and policies published in the most recent pricing list and promotional guidelines. The pricing may change at any time and it's the Solution Provider's responsibility to be aware of current pricing and policies.

Online and direct sales must comply with the rules set forth in the Intuit Minimum Advertised Pricing Policy ("MAP Policy") and "Safe to Advertise Policy," "Do Not Advertise Before Policy," and "Pre-Sell Policy" together, the "Advertising Policies."

If you are notified of any below-MAP listings, they must be updated to MAP within 48 hours. If they aren't updated within 48 hours without a verifiable, valid reason, you will forfeit all MDF for the quarter. If you continue to violate MAP, you will no longer be eligible for any special QSP pricing. Flagrant and ongoing violations will result in removal from the QuickBooks Solution Provider Program.

We are here to support you and your marketing efforts while maintaining the value of Intuit's products and reducing unnecessary noise across Intuit's sales channels.

### Online Advertising Guideline

The QuickBooks Solution Provider Program is designed to represent a high value shopping and licensing experience for customers where assisted solution design and selection, as well as ongoing support are valued. In accordance with this, Solution Providers are prohibited from engaging in any price-based online advertising where price, discounts, or promotions are mentioned without explicit approval from the Intuit Program team. Solution Providers are encouraged to appropriately utilize various online marketing vehicles to promote their value-added services and offerings as part of a comprehensive Intuit solution offering. In addition, list prices may be published along with any Intuit approved promotional copy.

After a new product version is released, Solution Providers may not advertise the previous version on any platform other than their own website after a period of 60 days from the release of the new version.

Solution Providers are expected to review the most current Promotional Guidance and annual Minimum Advertised Price (MAP) policy and comply with the directives therein. Policies can be updated at any time.

### Online and 3<sup>rd</sup> Party Stores

You are required to list any online or 3<sup>rd</sup> party store names in the Master QuickBase so we are aware of online marketing activities. Stores that appear to violate Intuit's brand guidelines or MAP policies will be flagged as fraudulent and legal action may be taken against those placements.

Participants in the QuickBooks Solution Provider Program may offer Intuit products and services on their own websites and third party websites in accordance with the terms of the QuickBooks Solution Provider Program. Notwithstanding the Agreement's general license to obtain and distribute Intuit Products, product licenses and associated media, this distribution license does not grant Solution Providers the right to distribute Intuit's QuickBooks Pro products (PC and Mac) and/or QuickBooks Online products on the Amazon website (amazon.com and associated sites). The offering and distribution of the QuickBooks Pro and QuickBooks Online products on the Amazon websites is prohibited under this Agreement and failure to conform to this contractual limitation shall be grounds for termination.

### Marketing Standards

1. You cannot use "QuickBooks," "QB," "Intuit," "Turbo", "Mint" or "ProAdvisor" (the "Intuit Brands") or brand elements (e.g. "quick," "intui," or "tuit") in the name or branding of your business, products/services, or any business materials.

2. While providing services under the Program, the company that maintains the QSP membership should operate under one business name/DBA only, unless otherwise expressly authorized by Intuit.
3. Your own logos and branding cannot be a mimicked version, similar to, or an alteration of an Intuit Brand logo or other Intuit branding; nor can your logos contain any Intuit Brands, brand elements or Intuit logos.
4. Your business name and/or logo must be clearly displayed at the top of your website.
5. Your business name and/or logo must appear larger than any Intuit Brand or Intuit Brand logo, including but not limited to the badging or authorized logos you display on your website, under the QuickBooks Solution Provider Agreement.
6. Your website domain/URL cannot contain any Intuit Brand or brand element. For example, you cannot use [www.quickbooksreseller.com](http://www.quickbooksreseller.com), [www.qbreseller.com](http://www.qbreseller.com) or [www.quickreseller.com](http://www.quickreseller.com), or any variations thereof.
7. Your website cannot contain any Intuit website design elements from any Intuit-owned website nor any photographs from any Intuit-owned website, unless specifically provided by Intuit for that purpose.
8. You must display the following notice on any materials where the Intuit and/or QuickBooks name is mentioned

“Intuit and QuickBooks are registered trademarks of Intuit Inc.”

9. You may use the Intuit provided product box shot images and any Intuit provided image on your website. You are allowed to resize the images to the exact proportion of their original height and width. The images cannot be “violated” or touched by any other text or graphics in any way, they must appear in their original colors, and there must be a border of space of at least 10% of the total height of each image surround the image on all sides in every instance.
10. You can use screenshots as set out at the following link:  
<https://www.intuit.com/legal/permissions/>
11. You may only use the following approved phrase(s) to promote, advertise, market or communicate your reseller status:

"Member: QuickBooks Solution Provider Program," "Member of the QuickBooks Solution Provider Program," "Independent QuickBooks Solution Provider". You cannot use the terms "Intuit Partner," "QuickBooks Partner," or any other description other than what is set forth above.

12. You cannot misrepresent your relationship with/to Intuit. When you promote, advertise, market or communicate in any manner, you cannot state or imply that you are affiliated with Intuit in any way other than your membership in the Program. (For example, you cannot answer the phone as "Intuit" or "QuickBooks Support." You must answer the phone with your own company name.)
13. You cannot state, imply, promote, advertise, market or communicate in any manner that you are working for or on behalf of Intuit (or QuickBooks or any other Intuit offering) or are an exclusive partner of Intuit. For example, you cannot state or imply that you or your staff are employees or representatives of Intuit, or official outsourcing partners of Intuit.
14. You must accurately disclose the following business information on your website: the business name, the physical location and street address of the business (whether an office or a residence) and accurate contact information.
15. If asked by a customer/end-user, all individuals within your business who assist QuickBooks end-users must disclose the physical location of the office from which they provide services.
16. You must disclose on your website all of the territories you serve.
17. You must disclose on your website all of the services you provide.
18. You cannot promote, advertise, market or communicate your services as being primarily focused on paid phone-based technical support.
19. You must display the current QuickBooks Solution Provider badge on your website home page.

### Advertisement Standards

(including but not limited to Google Ads)

1. All advertisements must clearly display your business name and/or your brand name as the primary element in the ad.
2. All ad titles must lead with your own business name or brand, or with an industry descriptor and cannot lead with Intuit Brands. For example, the ads cannot use "QuickBooks," "QB," or "Intuit" as the primary element in the ad (e.g., cannot say "QuickBooks Support" instead it must say "XYZ Company - Support for QuickBooks").
3. Service offered in the ad cannot solely be for paid phone-based technical support.
4. Ads cannot claim "24/7" availability.
5. Visible URL of ad cannot contain "QuickBooks," "QB," "Intuit," or any other Intuit Brand or brand element before the root domain or within the root domain, or any terms that appear before the ".com". For example, you cannot use "quickbooks.XYZresellername.com" or [www.quickbooksXYZreseller.com](http://www.quickbooksXYZreseller.com) as your visible URL.
6. All URLs, including visible URLs in your ads, must comply with the following requirements:
  - a. Use of Intuit brands as the "direct object" in the URL directory or path is OK
    - i. Example of authorized use "XYZreseller.com/BuyQuickBooks"
  - b. No use of Intuit Brands on a stand-alone basis after the ".com"
    - i. Example of prohibited use: "XYZreseller.com/QuickBooks"
  - c. No use of Intuit Brands in front of descriptive or generic terms after the ".com"
    - i. Example of prohibited use: "XYZreseller.com/QuickBooksServices"
7. In addition to what is set forth in the General Marketing Guidelines, you must negative match for the following keywords: "QuickBooks" and "QuickBooks Online."
8. You cannot bid on any stand-alone Intuit brands (e.g. QuickBooks, QuickBooks Payroll, QuickBooks Payroll Enhanced, QuickBooks Point of Sale, QuickBooks Enterprise, QuickBooks Online, QB, QBO, QBOA, QuickBooks Online Accountant, QuickBooks Desktop, Intuit QuickBooks, QuickBooks Desktop Pro etc.).

9. You may only bid on keywords that include an Intuit brand accompanied by a value-add or service (e.g. QuickBooks product demonstration, QuickBooks implementation, QuickBooks customization etc.).
10. If you have any questions, reach out to your Channel Account Manager.

### Definitions and Commission Scenarios

**Net Sale:** The gross amount of the sale of an Intuit product license or other Intuit offering minus any discounts or adjustments.

Discounts referenced above are calculated and applied at the time the sale is made and are a deduction from the list price of the offering.

**Commission:** A one-time amount paid to the Reseller based on the net sale of Intuit product licenses or other Intuit offerings.

**Residual:** Ongoing monthly payment for the life of the active subscription.

**Bounty:** One-time payment at a set amount earned at the time of the initial successful sale of the related product license or other offering.

**Top-Tier:** Elite, Executive, Strategic, and Advanced Solution Providers are considered “top tier” in any mentions above.

### Seat and Tier Upgrades/Downgrades (Modification)

**QuickBooks Enterprise Modifications:** When a customer adds/decreases seats or increases/decreases tiers for their QuickBooks Enterprise subscription, the Reseller will be paid on the net sales dollars of the charge for the customer at the GNS or Renewal rate depending on timing of when the upgrade or downgrade occurred (i.e. the net amount billed to the customer for the transaction, less any proration that gets applied from previous order). The same logic applies when a subscription is migrated from annual to monthly or monthly to annual payment plans. A clawback will only

occur if the proration of the previous order is greater than the new order being placed.

For example, if QuickBooks Enterprise Silver Annual subscription is renewed on October 1<sup>st</sup>, you will receive a commission for that sale. If on June 1<sup>st</sup>, that subscription is upgraded to QuickBooks Enterprise Gold Annual subscription, your customer will receive a prorated credit for the 4 months remaining on the Silver Annual subscription and a charge for the 12 month Gold Annual subscription. You will receive commission on that net amount paid by your customer.

**QuickBooks Desktop Plus:** QSPs will be paid on the net sale of incremental seat licenses or tier to the Plus subscription. The commission will be calculated on the net amount billed to the customer for the upgrade transaction. For downgrades, the Reseller will not receive a commission nor an adjustment to the prior commission.

### Product-Specific Payment Information

#### QuickBooks Enterprise

Suspends and Resumes: Resumes (re-activating an ES subscription) for annual subscriptions are eligible for commission. Commissions may be prorated based on the length of suspension. Resumes for monthly subscriptions are not eligible for commission, if the resume occurs within 12 months of the last commission payment. If the resume occurs more than 12 months after the last commission payment, the subscription is eligible for commission.

**QuickBooks Enterprise Subscription Cancellation:** If a customer subscription cancels within 60 days of the original order, a negative commission adjustment will occur. If the customer is active beyond 60 days, no adjustment will occur upon cancellation.

**Field Service Management:** Subscription residuals will be paid on the net sale beginning on the second month of the subscription.

**Enterprise Hosted Bundle and Stand-Alone Hosting:** Subscription residual will be paid on the net subscription sale each month for the hosting portion.

**Full Service and Assisted Payroll Subscriptions:** Residuals are paid based on monthly subscription fees plus any per employee fee charged for that month.

**Payments Profit Share:** The Payments profit share is the percentage of the Net Profit paid to QSPs. The Net Profit is calculated as the total fees received by Intuit related to credit card processing, minus all applicable costs and fees.