



Program Overview



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 program overview provides a summary of the QuickBooks Solution Provider Program. Once you have entered into a confidentiality agreement with Intuit, the full details of the program will be available to you.

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
- 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

QuickBooks Solution Provider Program

Tiers

The QuickBooks Solution Provider Program is made up of five tiers with corresponding requirements and benefits:

- Elite
- Executive
- Strategic
- Advanced
- Member

	 Elite	 Executive	 Strategic	 Advanced	 Member
Sales Threshold	•••••	••••	•••	••	•
Rebates	••••	•••	••	•	
Growth Accelerators	•••	••	•		
Co-op	•	•	•	•	

Program Requirements

To maintain the status and the benefits that come with being a QuickBooks Solution Provider, you'll need to maintain a few important performance metrics and certifications throughout the year. Below is a summary of the major 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. A new Solution Provider may qualify for tiers immediately upon entering the Program by demonstrating a reasonable ability

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to achieve the required net sales volume and other requirements during the upcoming fiscal year, which may be based upon a documented business plan.

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.

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.

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.

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.

Rebate Program

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

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.

Additional rebates may be provided in the form of accelerators when certain quarterly growth targets are met.

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.

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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.

QuickBooks Solution Provider Program

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.

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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 a percentage of the net sale with a maximum payout. Lead protection is

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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.

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

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.

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

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 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.

Online and 3rd Party Stores

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.