

the new v3 partner guide.

MOBILE
INDUSTRY AWARDS 2015
WINNER BEST B2B DISTRIBUTOR

WINNER
mobile news
2015 **AWARDS**
AIRTIME DISTRIBUTOR
PLAN.COM

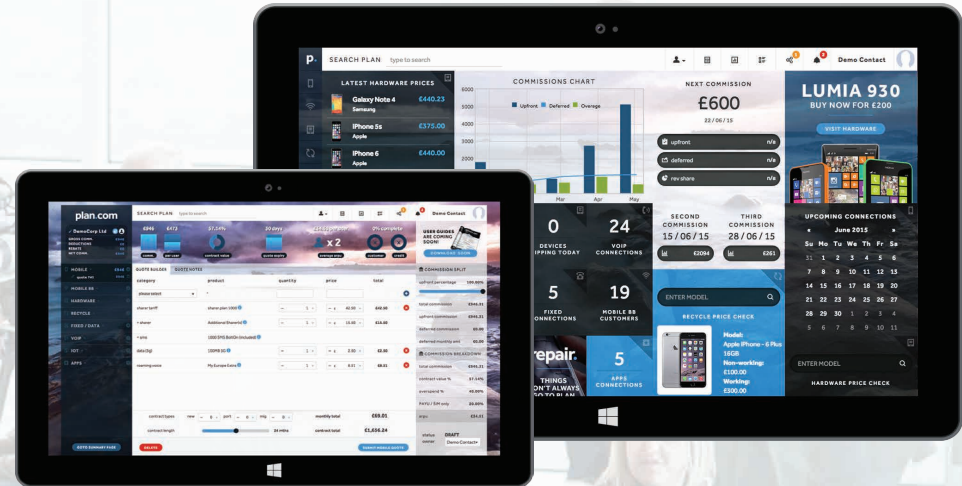
-  MOBILE
-  MBB
-  HARDWARE
-  RECYCLING
-  FIXED
-  VOIP
-  IOT
-  APPS

plan.com



contents.

The **plan.com** partner guide is your definitive source of information for all things relating to **plan.com**.



the business and our products

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plan.who?

plan.com is a multi-award winning provider of unified communication solutions to the partner channel.

Blending together cutting edge technology in the **plan.portal** (see page 6), 'old school' values of simplicity, transparency and True Partnership; and a team who is always prepared to go the extra mile, we are revolutionising the B2B communications sector.

But don't just take our word for it. In our first year we won several awards, including Best Airtime Distributor at the Mobile News Awards 2015 and most recently, Best B2B Distributor at the Mobile Industry Awards 2015, but perhaps most importantly, received hundreds of testimonials from our partners.

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Our financial backing from Bramden Investments, a leading private equity firm with an annual turnover in excess of £170m and a wide portfolio of successful investments, means that we have the financial and operational support to ensure that **plan.com** fulfils its enormous potential.

Let's get started...



unified comms made simple.

We offer a full range of unified communication solutions delivered through our intuitive **plan.portal**

Using technology and leveraging our strong supplier relationships, we can offer you everything you need to satisfy your most demanding customer, with unprecedented levels of flexibility and control:

- **Build completely bespoke tariffs on the fly**
- **Flex the contract length**
- **See your commission update in real time & choose when to get paid**

Our ethos of keeping things simple means that no matter which products you choose to sell, you are never more than few clicks from what you need. We're getting rid of the spreadsheets, the emails and the lengthy waits for information - now you have everything you need at your fingertips.



only the best will do.



We are incredibly selective when it comes to choosing which suppliers to partner with.

Put simply, they have to be the best; only recognised Tier 1 players capable of delivering the most robust solutions and the highest quality of service make the cut.

For mobile, it's O2. 24 million active customers, a continuous network improvement programme spending £1.5m+ per day and a commitment to reach 98% of the population with indoor coverage by 2016.

With fixed, BT. 28 million telephone lines, used by 94% of the FTSE100 companies and revenues of over £7bn.

With Apps it's Microsoft...

You get the idea.



plan.portal v3

“ redefining simplicity,
flexibility & partner control ”

Our simple to use partner platform, providing everything to run the most efficient business and close more deals.

The image displays two screenshots of the plan.portal v3 interface. The top screenshot, shown on a tablet, features a dashboard with several key components: a search bar at the top; a 'LATEST HARDWARE PRICES' section listing 'Galaxy Note 4 Samsung' at £440.23 and 'iPhone 5s Apple' at £375.00; a 'COMMISSIONS CHART' showing a bar chart for 'Upfront', 'Deferred', and 'Overage' commissions from January to May; a 'NEXT COMMISSION' section for £600 on 22/06/15 with options for 'upfront', 'deferred', and 'rev share'; and a 'LUMIA 930' advertisement for £200. The bottom screenshot, shown on a laptop, displays a 'QUOTE BUILDER' interface. It includes a sidebar with navigation options like 'MOBILE', 'HARDWARE', and 'RECYCLE'. The main area contains a table for building quotes with columns for 'category', 'product', 'quantity', 'price', and 'total'. Below the table are sections for 'COMMISSION SPLIT', 'COMMISSION BREAKDOWN', and 'contract types'. A 'SUMMARY PAGE' button is visible at the bottom left.



dashboard.

Left Navigation

The side menu gives you quick access to build a new quote.

Fully Customisable

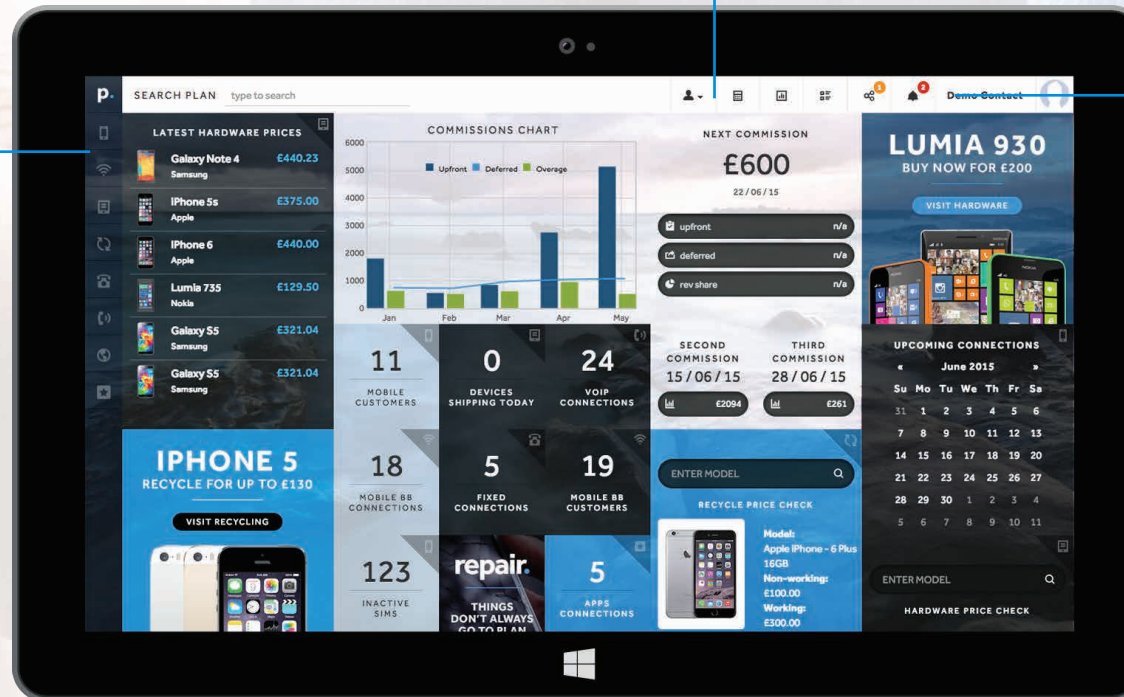
You can edit the size, position and colour of your tiles as well as choosing which to display, making your dashboard relevant to your business.

Top Navigation

The top menu houses your main navigation options such as customers, commissions the communications centre and the marketing & training suite.

Alerts

Alert flags show you when something needs your attention.



the quote builder.

Quick Reference Tiles

Relating to your commissions and quote, these key indicators have all the information you need to ensure the deal is commercially viable for you.

plan.com Logo

As with all pages, this will take you to your dashboard.

Commissions Summary

See a quick snapshot of the sum of commissions from all the quotes together.

Left Navigation

See all channels and quotes down the left hand side.

Channels

Easily switch between channels by clicking the channel name. You can choose the relevant quote from the dropdown that appears.

Middle Pane

This is where the deal is created. Whether it's VoIP or Mobile, Fixed or IoT you'll see the structure stays as similar as possible to make viewing and creating deals as easy as possible.

Commissions

All of your commission information builds here as you put together your quote. From here you can set your upfront commission as well as view figures for overspend and contract value.

category	product	quantity	price	total
please select				
sharer tariff	sharer.plan 1000	1	€ 42.50	€42.50
+ sharer	Additional Sharer(s)	1	€ 15.50	€15.50
+ sms	1000 SMS BotOn (Included)			
data (3g)	100MB 3G	1	€ 4.50	€4.50
roaming voice	My Europe Extra	1	€ 8.51	€8.51

COMMISSION SPLIT	
upfront percentage	100.00%
total commission	€946.31
upfront commission	€946.31
deferred commission	€0.00
deferred monthly amt	€0.00

COMMISSION BREAKDOWN	
total commission	€946.31
contract value %	57.14%
overspend %	40.00%
PAYU / SIM only	20.00%
arpu	€34.51

the wallet.

Product Filter

Quickly and easily filter what you want to see on this page.

Tabs

The tab menu across the top is where you can choose to enter customer information, view commissions, and monitor customer communications.

Commissions/ Services Toggle

Allows you to quickly view your commercials and the customer's costs.

	status	upfront commission	upfront commission %	total commission	contract value	revshare commission %	actions
mobile quote 629	DRAFT	£0.00	0%	£3,194.62	43.05%	48%	[edit] [share] [trash]
mobile bb quote 600	DRAFT	£9,171.44	100%	£9,171.44	50.95%	40%	[edit] [share] [trash]
hardware quote 601	DRAFT	N/A	N/A	-£2,150.00	N/A	N/A	[edit] [share] [trash]
recycle quote 602	DRAFT	N/A	N/A	£1,400.00	N/A	N/A	[edit] [share] [trash]
fixed / data WD33JP	DRAFT	£3,444.74	100%	£3,444.74	16.73%	10%	[edit] [share] [trash]
voip quote 604	DRAFT	£0.00	0%	£2,482.90	70.14%	100%	[edit] [share] [trash]
iot quote 605	DRAFT	£163,125.30	100%	£163,125.30	10.83%	40%	[edit] [share] [trash]
apps quote 606	DRAFT	£8,587.77	100%	£8,587.77	68.08%	N/A	[edit] [share] [trash]
			£184,329.25	£189,256.77			

Quotes

View all the quotes sorted by channel and get a quick snapshot of the progression and commercials on all quotes for the customer.



commissions.

Commission Filters

The filters allow you to set a bespoke view.

Magnifying Glass

Click the spyglass to drill into each payment by channel, customer, and service.

Bar Graph

The bar graph shows you how your commissions compare over the previous months.



plan.burst

Use the plan burst to visually compare commissions by channel, payment type and customer.

Upcoming Commissions

Easily view a quick snapshot of your next 3 commissions payments and how they break down.



customers.

Customer Filters

Here you can set a bespoke view and find customers quickly.

Customer Table

View relevant information on connected customers like channel, connection count and billing balances.

Action Icons

These allow you to quickly perform various actions on that customer like editing their details, viewing quotes or checking their connection schedule.

name	connections	next expiry date	last bill amount	current balance	status	actions
Graham Industries					ACTIVE	[icons]
Graham Industries 1					ACTIVE	[icons]
Grape					ACTIVE	[icons]
Group Systems Corp Co.	1	14/08/2016	£ 462	£ 271	ACTIVE	[icons]
hgrgrh					ACTIVE	[icons]
Holdings Systems LLC	1	15/11/2016	£ 95	£ 61	ACTIVE	[icons]
Insurance Europe Ltd	1	15/01/2018	£ 452	£ 372	ACTIVE	[icons]
Insurance Plumbing International PLC	1	05/02/2017	£ 346	£ 18	ACTIVE	[icons]
Insurance Plumbing Ltd	1	09/02/2016	£ 329	£ 31	ACTIVE	[icons]
lop					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]
					ACTIVE	[icons]

SEARCH PLAN type to search

SEARCH PLAN type to search

Group Systems Corp Co.

customer type: Limited Company

company name: Group Systems Corp Co.

telephone: [field]

fax: [field]

website: [field]

date incorp.: 23/04/2010

reg no.: 22008847

offices / employees: 1 / 5

contact: Zoey Hill

address: No matching records found

Customer Details

Edit the customer information including their addresses, key contacts and customer type.



true partnership.

plan.com puts you in complete control of your commission payments on a deal by deal basis. As you build a quote in the plan.com partner portal, you will see the full details of the commission payment displayed in the commission pane.

the three commission components

- **up front commission** - the amount you will be paid at the start of the customer's contract
- **deferred commission** - the amount you will be paid monthly for the contract term based on the contract spend
- **revenue share commission** - the amount you will be paid based on the customer's spend over the contract amount (overspend)

When building a quote, you have complete control over the amount of commission you take up front vs deferred. The total amount of the commission does not change based on how much of the commission you would like up front. However, the revenue share percentage will change depending on how much commission you take up front.

the commission schedule

up front commission

- contracts connected between the 1st - 15th of the month are paid on the 28th of that month
- contracts connected between the 16th - 31st of the month are paid on the 15th of the following month

revenue share commission & deferred commissions

- paid on the 22nd of the month (first payment is paid the month following the connection date

example payment

- deal connected on May 10th, 24 month term, £15,000 commission due, 75% up front selected
- £11,250 paid on May 28th - up front commission
- 156.25 paid on June 22nd and the 22nd of each subsequent month - deferred commission
- £XXX.XX paid on June 22nd based on the customers overspend for May - revenue share commission

plans obligation to the partner

- **plan.com** will assist partners with marketing of services
- **plan.com** will provide the partner accurate reporting on customer billing and usage via the **plan.com** partner portal
- **plan.com** will not set volume, cross-selling or other targets
- **plan.com** will treat all partners equally
- **plan.com** will pay commissions on time, every time
- **plan.com** will provide accurate commission and usage information at all times



marketing.

To support your business, we offer a full range of marketing materials including customer handouts and various banners.

If you see something we don't currently offer, just ask and we'll do our best to help you out.

Marketing & Training Suite

From here you can get straight through to our marketing & training suite where you can download handouts for your customers, watch our portal training videos and more.

The tablet screen displays the 'marketing & training suite' web portal. At the top, there is a search bar with the text 'SEARCH PLAN type to search' and a 'Demo Contact' button. The main content area is divided into several sections:

- partner information**: 'from your partner guide to channel factsheets, we've got all the information you need here'. Includes a 'CLICK HERE TO DOWNLOAD' button and a thumbnail image.
- customer information**: 'channel factsheets & guides that you can co-brand to distribute to your customers'. Includes a 'CLICK HERE TO DOWNLOAD' button and a thumbnail image.
- FAQ's**: 'got a question? find the answer using our frequently asked questions'. Includes a 'CLICK HERE TO VIEW' button and a thumbnail image.
- templates & logos**: 'co-branded materials so you can market plan.com to your customers'. Includes a 'CLICK HERE TO VIEW' button and a thumbnail image.
- training calendar**: 'book in a training session that suits you using our interactive training calendar'. Includes a 'CLICK HERE TO VIEW' button and a thumbnail image.
- training videos**: 'let us show you round V3 of the portal and walk you through everything you need to know'. Includes a 'CLICK HERE TO VIEW' button and a thumbnail image.

get in touch.

We pride ourselves on our responsive and helpful support team.

Give us a call or drop us an email using the details below and we'll do our best to help.

plan.com

plan.com

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customer service:

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dealer support:

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