

Kaplan Commission Platform, powered by CaptivateIQ

Your quick training guide

Presented by



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Introduction to CaptivateIQ

CaptivateIQ is a leading sales commission software, and our new partner in launching and developing our exciting new agent commission platform.

The platform brings a variety of useful benefits to you and your organisation:

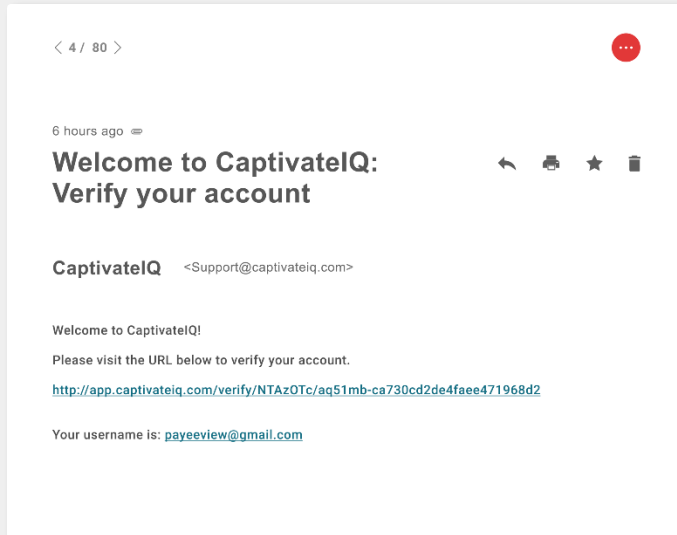
- View current and year-to-date commission data all in one place
- Access commission statements on demand
- Approve statements online for quicker commission payments
- Receive updated bonus calculations, as soon as new tiers are reached
- And many more!

Find out how to use the commission platform in this guide.

CaptivateIQ

Welcome to the Kaplan Commission Platform, powered by CaptivateIQ

- Once your CaptivateIQ account has been setup, you will receive a welcome email that looks similar to the example. Please note, activation emails are currently being sent out to agents by CaptivateIQ.



- This is automatically generated and will be sent to the email address identified as the 'UKP/USP Commission Handler' for your company.

CaptivateIQ

- Visit the URL to set your password

CaptivateIQ

Set New Password

- At least 12 characters
- Must contain at least 1 uppercase letter, 1 lowercase letter, 1 number and 1 special character
- Cannot contain more than 4 repeating ("aaaa") or ordererd ("abcd") characters
- Cannot be your name or email address
- Cannot be a common password

New Password

Confirm Password

[Change My Password](#)

CaptivateIQ

User Login

Email

Password

[Login](#)

[Forgot password?](#)

[Login with Google](#)

[Login with SSO](#)




CaptivateIQ

Reset Complete

Your password has been set. You may go ahead and log in now.

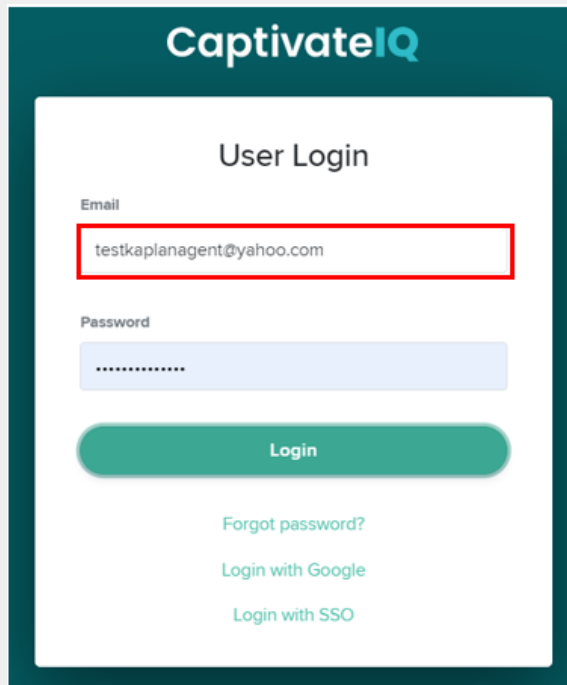
[Back to Login](#)

- The Commission Platform can be accessed via: <https://app.captivateiq.com/>

- Recommended browsers:  Chrome  Firefox  Chromium Browsers

- **Email:** This will be the email address which the agent has registered with Kaplan as the dedicated 'Commission Handler' email, which is used for commission correspondence

- **Password:** If forgotten, click “Forgot password?” to create a new password



CaptivateIQ

User Login

Email

testkaplanagent@yahoo.com

Password

.....

Login

[Forgot password?](#)

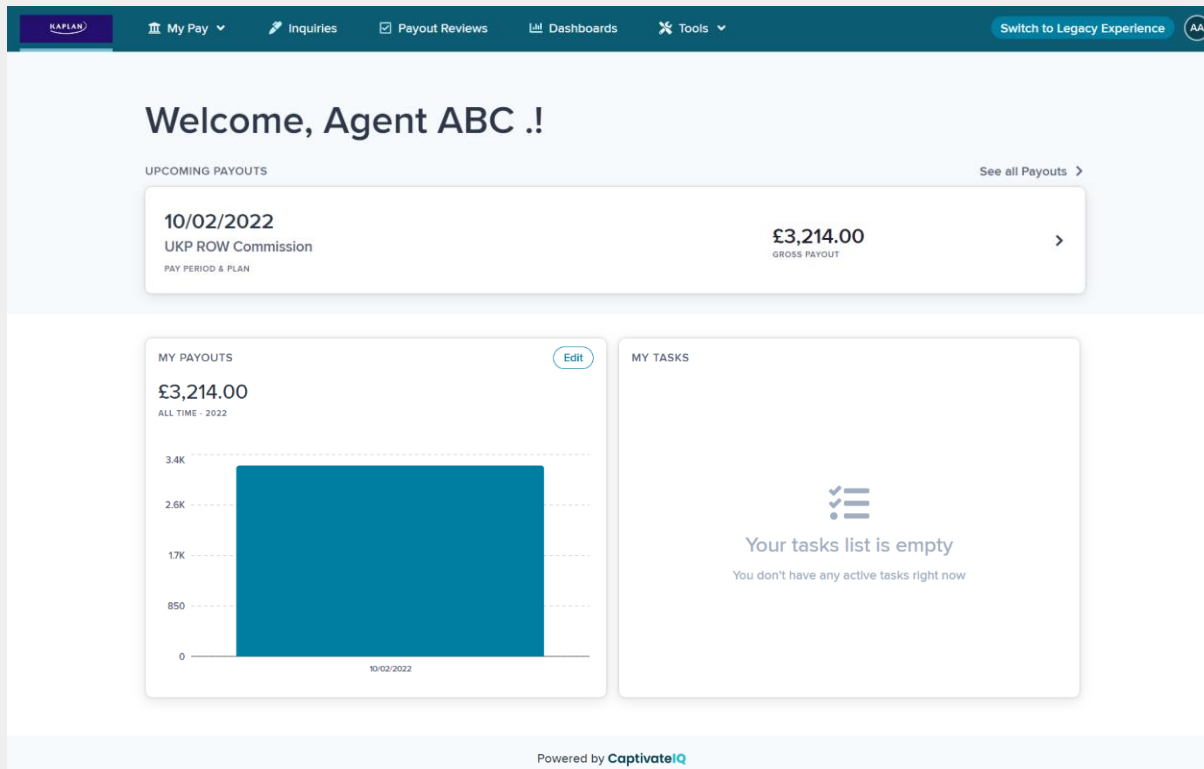
[Login with Google](#)

[Login with SSO](#)

CaptivateIQ


After logging in

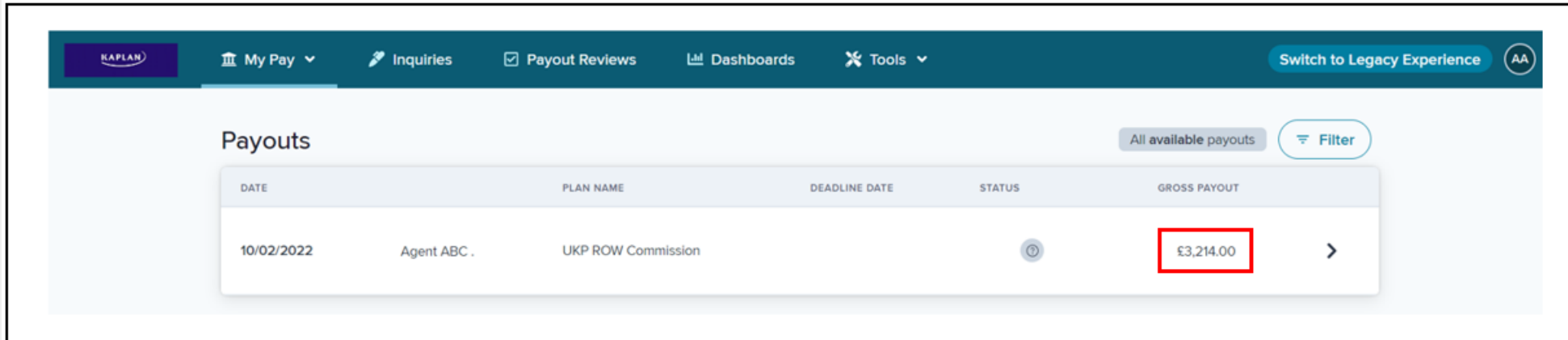
- The default page is the homepage screen.
- This is where you will find a high-level overview of all things relating to your Kaplan commissions.




CaptivateIQ

Payout Statements

- Navigate to **My Pay > My Payouts**
- This is where you can view all of your finalized statements.
- You can also use the filter feature  to look at specific statements.

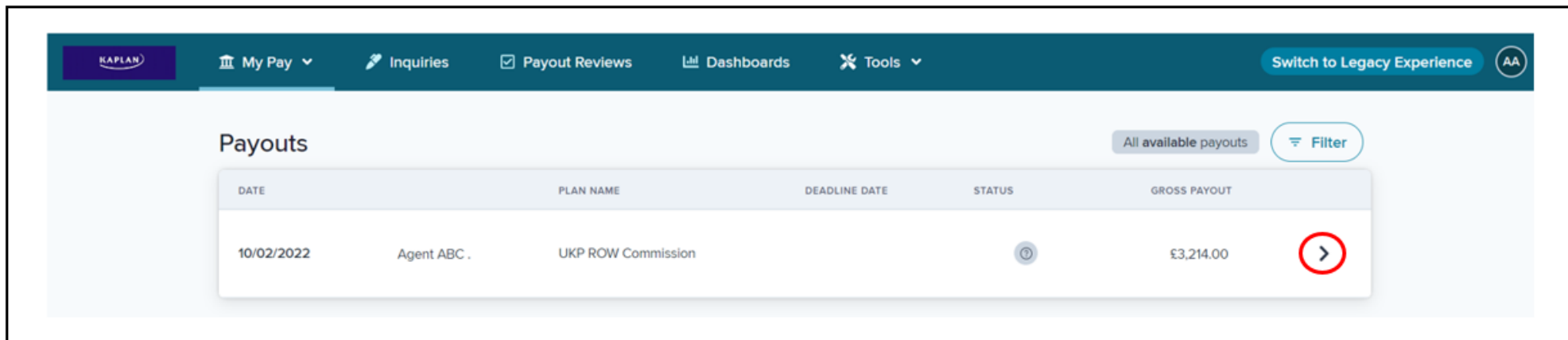


The screenshot displays the 'Payouts' section of a user interface. At the top, there is a navigation bar with the Kaplan logo and several menu items: 'My Pay', 'Inquiries', 'Payout Reviews', 'Dashboards', and 'Tools'. A 'Switch to Legacy Experience' button is also present. Below the navigation bar, the 'Payouts' section is titled, and there is a 'Filter' button. The main content is a table with the following data:

DATE	PLAN NAME	DEADLINE DATE	STATUS	GROSS PAYOUT
10/02/2022	Agent ABC .	UKP ROW Commission		£3,214.00

View a Statement

- There are two ways to view your statements:
 1. In a browser
 2. Download to Excel (*Note: There are no charts in the Excel download*)
- Click on the arrow next to the Payout to view in your browser:



The screenshot shows the Kaplan Payouts interface. At the top, there is a navigation bar with the Kaplan logo, "My Pay", "Inquiries", "Payout Reviews", "Dashboards", and "Tools". A "Switch to Legacy Experience" button and a user profile icon "AA" are also present. Below the navigation bar, the "Payouts" section is displayed. It includes a "Filter" button and a "All available payouts" label. The main content is a table with the following data:

DATE	PLAN NAME	DEADLINE DATE	STATUS	GROSS PAYOUT
10/02/2022	Agent ABC .	UKP ROW Commission		£3,214.00

- The statement which contains details relating to the commission payment will be displayed onscreen:

Agent ABC .
testkaplanagent@yahoo.com

10/02/2022
UKP ROW Commission
PAY PERIOD & PLAN

Total commission amount payable: **£3,214.00**
GROSS PROFITS

New Inquiry

Download statement to Excel

Statement Details

FY22
01/01/2022 - 31/12/2022

Agent Details

Agent Salesforce ID: 99999
GPL Creditor ID: TES123

Commission Payment Summary

Standard Commission:	£2,814.00
Enrollment Bonus:	£400.00
Annual Tiered Bonus:	£0.00
Commission Adjustment:	£0.00

BANK DETAILS:
Beneficiary Name: Bank of Chile
Account Number (last 4-digits): ****5678

*****IMPORTANT*****
If these bank details have changed, please do not 'approve' the statement in CaptivateIQ. Please either raise an Enquiry case or contact your Kaplan representative.
By approving the statement amount, you are confirming that the payment details are correct.

Standard Enrollment Commission

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	TERM	TUITION (GBP)	TUITION RATE	TUITION COMMISSION	INSURANCE (GBP)	INSURANCE RATE	INSURANCE COMMISSION	TOTAL COMMISSION PAYABLE
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	Spring 2022	18,290	15%	2,743.50	470	15%	70.50	2,814.00

Enrollment Bonus

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	ENROLLMENT BONUS (GBP)
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	400

Annual Tiered Bonus

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	TERM	YTD STUDENT ENROL. COUNT	ANNUAL TIERED BONUS GBP	PRIOR ANNUAL BONUS
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	Spring 2022	1	0	0

Commission Adjustment

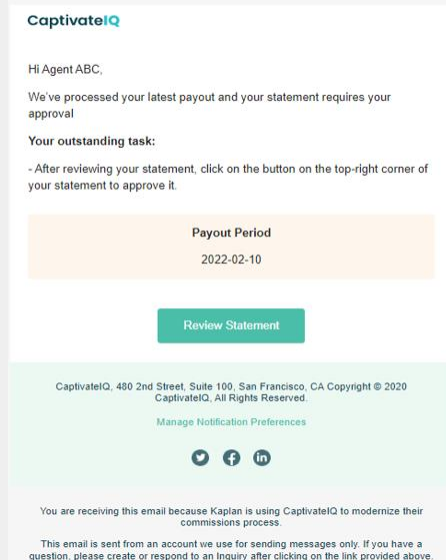
MONTH END DATE	DESCRIPTION	AMOUNT
This table has no records.		

*****IMPORTANT*****
Information provided for students enrolled during 2022 is purely for historical reference only. Unclaimed commission amounts relating to these enrollments must be claimed via previous methods.

Powered by CaptivateIQ

Statement Approvals

- Once the student has enrolled and a commission amount has been calculated and is available for you to review, an email notification will be sent as follows:
- Please note that the automated email will be sent by no-reply@captivateiq.com
- Only the designated email address which has been identified by Kaplan as the 'Commission Handler' will receive this notification automatically



CaptivateIQ

- Logging back into the Kaplan Commission Platform, you will now see a Payout Statement with status = PENDING

The screenshot displays the Kaplan Commission Platform dashboard for Agent ABC. The top navigation bar includes 'My Pay', 'Inquiries', 'Payout Reviews', 'Dashboards', and 'Tools', along with a 'Switch to Legacy Experience' button and a user profile icon. The main heading reads 'Welcome, Agent ABC .!'. Below this, the 'UPCOMING PAYOUTS' section features a card for a payout on 30/06/2022 for 'UKP ROW Commission' with a gross amount of £3,649.75. The status is 'PENDING', which is highlighted with a red box. The approval deadline is 31/12/2022, in 20 days. Below the payouts, the 'MY PAYOUTS' section shows a total of £6,863.75 for all time in 2022, with a bar chart comparing two periods: 10/02/2022 and 30/06/2022. The 'MY TASKS' section indicates that the task list is empty.

Pay Period & Plan	Approval Deadline	Gross Payout	Status
30/06/2022 UKP ROW Commission	31/12/2022 in 20 days	£3,649.75	PENDING

Period	Payout Amount
10/02/2022	~2.8K
30/06/2022	~3.1K

- Click the arrow to review the commission statement details and if happy that commission amounts are correct and as expected, to approve click on: Approve payout

Agent ABC .
testkaplanagent@yahoo.com

30/06/2022
UKP ROW Commission
PAY PERIOD & PLAN

31/12/2022
in 20 days
APPROVAL DEADLINE

£3,649.75
GROSS PAYOUTS

PENDING

New Inquiry Approve payout

Statement Details

FY22
01/01/2022 - 31/12/2022

Agent Details

Agent Salesforce ID: 99999
GPL Creditor ID: TES123

Commission Payment Summary

Standard Commission:	£3,249.75
Enrollment Bonus:	£0.00
Annual Tiered Bonus:	£400.00
Commission Adjustment:	£0.00

BANK DETAILS:
Beneficiary Name: Bank of Chile
Account Number (last 4-digits): ****5678

*****IMPORTANT*****
If these bank details have changed, please do not 'approve' the statement in CaptivateIQ. Please either raise an Enquiry case or contact your Kaplan representative.
By approving the statement amount, you are confirming that the payment details are correct.

Standard Enrollment Commission

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	TERM	TUITION (GBP)	TUITION RATE	TUITION COMMISSION	INSURANCE (GBP)	INSURANCE RATE	INSURANCE COMMISSION	TOTAL COMMISSION PAYABLE
P789012	Test Student 2	Kaplan International College London	Foundation Certificate 3 Terms for Business, Law and Social Sciences	Summer 2022	21,195	15%	3,179.25	470	15%	70.50	3,249.75

Enrollment Bonus

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	ENROLLMENT BONUS (GBP)
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	400

Standard commission relating to new student/intake

Enrollment Bonus

Search Table

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	ENROLLMENT BONUS (GBP)
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	400
P789012	Test Student 2	Kaplan International College London	Foundation Certificate 3 Terms for Business, Law and Social Sciences	0

Annual Tiered Bonus

Search Table

STUDENT ID	STUDENT NAME	SCHOOL	COURSE NAME	TERM	YTD STUDENT ENROL COUNT	ANNUAL TIERED BONUS GBP	PRIOR ANNUAL BONUS
P123456	Test Student	University of York International Pathway College	Foundation Certificate Business and Finance	Spring 2022	2	200	0
P789012	Test Student 2	Kaplan International College London	Foundation Certificate 3 Terms for Business, Law and Social Sciences	Summer 2022	2	200	0

This table has no records.

*****IMPORTANT*****
Information provided for students enrolled during 2022 is purely for historical reference only. Unclaimed commission amounts relating to these enrolments must be claimed via previous methods.

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New student

New student

- After clicking on **'Approve payout'**, please tick the box as acknowledgment and **'Approve'**:

Approve payout ×

PLAN DATE
2022-06-30

PLAN
UKP ROW COMMISSION

GROSS PAYOUT
£3,649.75

By selecting the checkbox and clicking Approve, you acknowledge receipt of, and understand and agree to the totals included on this Statement. If you see potential issues, please open an inquiry.

Cancel Approve

- Once approved, navigating back to **My Pay > My Payouts**, you will see a list of all previous payout statements and the current status of each payout statement:

Payouts All available payouts Filter

DATE	PLAN NAME	DEADLINE DATE	STATUS	GROSS PAYOUT
30/06/2022	Agent ABC - UKP ROW Commission	31/12/2022	APPROVED	£3,649.75
10/02/2022	Agent ABC - UKP ROW Commission		APPROVED	£3,214.00

- Once approved in the commission platform, payments will be remitted to agents per the agreed Service Level Agreement (SLA) timeframes.

Submitting an Inquiry

- If there is a question about the commission payout statement, or if you do not agree with the commission amount calculated, you can submit an inquiry within the statement directly.
- You can choose to submit the inquiry to your Kaplan representative for review. You will have to option to specify which section of the commission statement your question relates to.
- To submit an inquiry, after you have clicked into the relevant statement, click on 'New Inquiry' next:

The screenshot displays the Kaplan Pathways portal interface. At the top, there is a navigation bar with the Kaplan logo and menu items: My Pay, Inquiries, Payout Reviews, Dashboards, and Tools. A 'Switch to Legacy Experience' button is also present. Below the navigation bar, the main content area shows details for 'Agent ABC' (testkaplanagent@yahoo.com) and a commission statement for '30/06/2022' (UKP ROW Commission) with a gross payout of £3,649.75. The statement status is 'PENDING'. A 'New Inquiry' button is highlighted with a red box, and an 'Approve payout' button is also visible. Below the statement details, there is a section for 'Statement Details' (FY22, 01/01/2022 - 31/12/2022) and 'Agent Details' (Agent Salesforce ID: 99999, GPL Creditor ID: TES123).

- This will open up the Inquiry panel for you to enter your question, ie:

Create new inquiry ×

INQUIRY TITLE
Commission amount query for student "Test 2"

REFERENCE (OPTIONAL)
FY22 (2022-01-01 - 2022-12-31) ▼

SECTION (OPTIONAL)
Standard Enrollment Commission ▼

RECIPIENTS
Debbie Lee × | clear all ▼

Once added, a recipient cannot be removed.

The tuition fee for student 'P789012 Test Student 2' seems too low at £21,195. The student has paid £23,00 for their tuition. Please can someone investigate and contact me to clarify. 📎 ➔

- Back on the Homepage, your inquiry will be displayed with your comments:

Welcome, Agent ABC .!

UPCOMING PAYOUTS See all Payouts >

30/06/2022 UKP ROW Commission <small>PAY PERIOD & PLAN</small>	£3,649.75 <small>GROSS PAYOUT</small>	PENDING >
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Commission amount query for student *Test 2*: The tuition fee for student *P789012 Test Student 2* seems too low at £21,195. The student has paid ... 1 >

MY PAYOUTS Edit

£6,863.75
ALL TIME - 2022

Date	Payout Amount
10/02/2022	~3.0K
30/06/2022	~3.8K

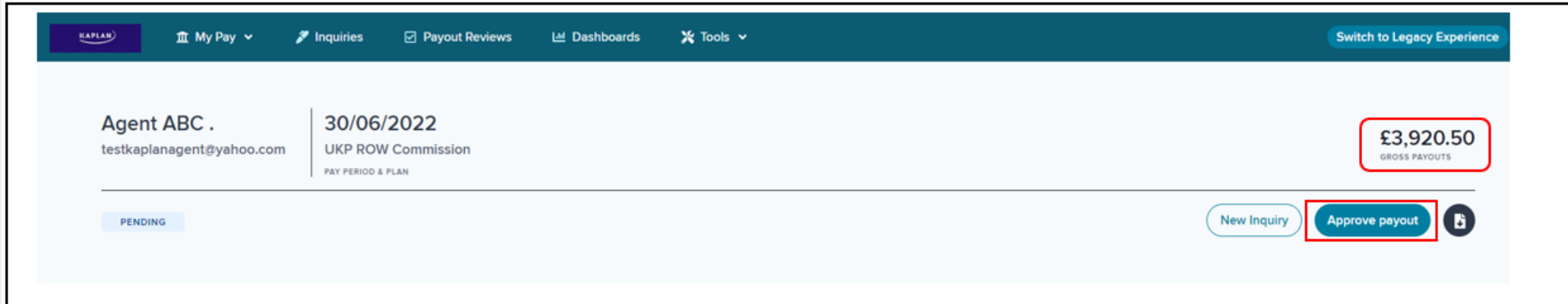
MY TASKS

0 Pending reviews GO TO REVIEWS	1 Open inquiries GO TO INQUIRIES
--	---

- Click on 'Open Inquiries' to view any new replies:

The screenshot displays a web interface for managing inquiries. On the left, a list of inquiries is shown, with the selected one being '11/12/2022 Commission Amount Query For Student "Test 2"'. The main area shows a message thread for this inquiry. The thread includes a header with the agent name 'AGENT ABC', a timestamp '6 MINUTES AGO - 11/12/2022', and a status 'OPEN'. The subject of the inquiry is 'STANDARD ENROLLMENT COMMISSION'. Below this, there are buttons for 'View full details' and 'Mark as resolved'. A list of recipients includes 'Debbie Lee' and 'Agent ABC'. The message history shows a query from the student on 11/12/2022 regarding a low tuition fee, followed by a reply from the team on the same date, which is highlighted with a red box. The reply states: 'Hi - Thank you for your comments. The tuition fee has been updated and commission re-calculated. Please review and approve again. Team Kaplan'. At the bottom, there is a text input field for sending a new message.

- If happy with the amendments/new commission amount, please click on 'Approve payout' to proceed:



Example of a Downloaded Statement

KAPLAN

Payout Export Details

Name: Agent ABC
 Organization: Kaplan Partner Services
 Commission Plan: UKP ROW
 Payout Date: 30/6/2022
 Payout Amount(s): £3,920.50
 Exported: 12/12/2022 9:19AM GMT

Payout by Period Group

Period Group	Start Date	End Date	Pre-Adjusted Payout	Adjustments Total	Adjusted Payout
FY22	1/1/2022	31/12/2022	£3,920.50	£0.00	£3,920.50

FY22 Statement

Agent Details

Agent Salesforce ID: 99999
 GPL Creditor ID: TES123

Commission Payment Summary

Standard: £3,520.50
 Enrollment Bonus: £0.00
 Annual Tiered Bonus: £400.00
 Commission Adjustment: £0.00

 BANK DETAILS:
 Beneficiary Name: Bank of Chile
 Account Number (last 4-digits): ****5678

*****IMPORTANT*****
 If these bank details have changed, please do not 'approve' the statement in CaptivateIQ. Please either raise an Enquiry case or contact your Kaplan representative.

By approving the statement amount, you are confirming that the payment details are correct.

Standard Enrollment Commission

Student ID	Student Name	School	Course Name	Term	Tuition (GBP)	Tuition Rate	Tuition Commission	Insurance (GBP)	Insurance Rate	Insurance Commission	Total Commission Payable
P789012	Test Student 2	Kaplan International College London	Certificate 3 Terms for Business, Law and Social Sciences	Summer 2022	23,000	15%	3,450	470	15%	70.5	3,520.50

Enrollment Bonus

Student ID	Student Name	School	Course Name	Enrollment Bonus (GBP)
P123456	Test Student	University of York International Pathway College	Certificate Business and Finance Foundation	400
P789012	Test Student 2	Kaplan International College London	Certificate 3 Terms for Business, Law and Social Sciences	0

Annual Tiered Bonus

Student ID	Student Name	School	Course Name	Term	YTD Student Enrol. Count	Annual Tiered Bonus GBP	Prior Annual Bonus
P123456	Test Student	University of York International Pathway College	Certificate Business and Finance Foundation	Spring 2022	2	200	0

Annual Tiered Bonus

Student ID	Student Name	School	Course Name	Term	YTD Student Enrol. Count	Annual Tiered Bonus GBP	Prior Annual Bonus
P123456	Test Student	University of York International Pathway College	Certificate Business and Finance Foundation	Spring 2022	2	200	0
P789012	Test Student 2	Kaplan International College London	Certificate 3 Terms for Business, Law and Social Sciences	Summer 2022	2	200	0

Commission Adjustment

Month End Date	Description	Amount
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*****IMPORTANT*****

Information provided for students enrolled during 2022 is purely for historical reference only. Unclaimed commission amounts relating to these enrollments must be claimed via previous methods.



Change of Company Account Details

If you notice that either your Beneficiary Name or bank account numbers are incorrect – please contact your Market Manager.

If you need to inform us of any changes to your company bank account details, please follow these steps

Step 1. Contact your Market Manager to request a **Vendor Change Form**.

Step 2. Complete the **Vendor Change Form** and send it back to your Market Manager together with supporting documents, which will include:

- Confirmation letter (on company letterhead) confirming request to update / change bank account details
- Copy of recent bank statement
- Copy of Business Registration

Step 3. Once all checks are complete, your Market Manager will call you to complete final confirmation of bank change details

CaptivateIQ

Answers to Common Questions

- **Do I need to send in an invoice to claim new commission (from 2023 onwards)?**

No! All commission statements for students who enrol from Spring 2023 will be approved via the CaptivateIQ platform – there is no need to send invoices for any new students from 2023 onwards

- **Where do I get my password for CaptivateIQ?**

CaptivateIQ activation emails with full instructions (on how to activate your account and set your password) are sent from no-reply@captivateiq.com NOT a Kaplan email account. Please check your spam/junk folders for this email. This email will be sent to the designated Commission Handler

- **If my agency has multiple branches, will we receive logins for each branch?**

There will be only one account per agent - a nominated commission handler should be identified to review commission statements on behalf of the agent (including all branches). The commission handler will be the ONLY person designated to approve statements for payment.

- **What happens if my agency hasn't yet enrolled students in Spring 2023? When will I receive log in details?**

At each intake point, the Kaplan Finance team will identify agents who do not yet have a CaptivateIQ account – CaptivateIQ will then send out an activation email to the nominated commission handler's email account. Further training will be offered during the year.

CaptivateIQ

Answers to Common Questions

- **What if I forget my password?**

There is a password reset option in CaptivateIQ. This is found on the log-in page - <https://app.captivateiq.com/>

- **What if I need to enquire about a student who I believe is missing from my commission statement?**

Please raise an inquiry through the inquiry section in CaptivateIQ or email pathways.commission@kaplan.com. You are also welcome to contact your Market Manager.

- **What if I have approved the payout without checking that the bank details are correct?**

You **MUST** check that the beneficiary's name and the last 4 digits of your company bank account as displayed on the commission statement are correct.

If you approve the statement within the platform and notice incorrect bank details, you **MUST** advise Kaplan **IMMEDIATELY** by emailing pathways.commission@kaplan.com and copy in your Market Manager.

CaptivateIQ

Thank you

We hope you enjoy using the new
Kaplan Commission Platform!

Contact us for more information!

- Email pathways.commission@kaplan.com
- Or contact your Market Manager, who'll be happy to help

KAPLAN INTERNATIONAL
PATHWAYS

CaptivateIQ

