KRI

ATA AQUARIAN TRAINER ACADEMY

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PROGRAM ROYALTIES Module on the CRM Trainer Portal

Trainer Portal: At this portal access level, you will NOT be able to view this module.

Lead Trainer Portal: At this portal access level, you will be able to view in this module **all the Program Royalty records for each of your programs**.

Program Admin Portal: At this portal access level, you will be able to view in this module all the **Program Royalty records** for the programs where you have been assigned as **Program Administrator**.

Program Royalties module OVERVIEW

This module is where the Lead Trainer or Program Administrator submits the Program Royalty Payment Description, previously known as the **Royalty Form**. We are no longer using the old Royalty Forms attached as separate documents to the contract on the Portal. All royalty information is now processed directly in the CRM.

Each Program record has a corresponding Program Royalty Record, created at the **start date** of the program. The information in the Program Royalty Record is automatically filled in based on the data in the Program module. If you find any discrepancies, please contact us so we can make the necessary corrections.

On the Program Royalty due date, the Lead Trainer or Program Administrator must calculate the Program Royalties and submit the payment to KRI. An email notification will be sent one week before the due date as a reminder.

Information Contained in the Program Royalties Module:

- **Program Information**: This section is filled out automatically based on the related Program record. It includes: Program Number, Lead/Licensee, Program Administrator, Start and End Dates, Program Royalties Due Date, Country, and Number of Students (this field reflects the number of students added to the program via import).
- **Training Manual Info**: Completed by the Lead Trainer to indicate the source of the Teacher Training Materials used in the program.
- **Local Value**: Completed by the Lead Trainer to indicate the currency in which the program was charged and the conversion rate to be applied for the calculation.
    - **IMPORTANT:** For the formulas to work, you must enter the **exchange rate first**—before adding any payment calculations or deductions. Use a reliable currency converter to determine the rate from **local currency to U.S. dollars**.
- **Deduction per Student (only for L1 Programs)**: Completed by the Lead Trainer to indicate the applicable deductions for that program, based on what was included in the program price.

➔ **Payment Calculation**: Completed by the Lead Trainer to indicate the number of students who paid each type of registration price. This is a sub-form that allows multiple entries.
  - Based on the exchange rate entered in the Local Value section, the system automatically calculates the number of students included in the calculation, as well as the total amounts in local currency and in U.S. dollars.

➔ **Royalties Due**: The Lead Trainer indicates the type of fee (10% or Flat Rate), and the system calculates the total amount due in U.S. dollars.

➔ **Submit Royalty Description**: Once completed, the Lead Trainer must change the status to **YES**, so it can be sent for KRI's review and approval.

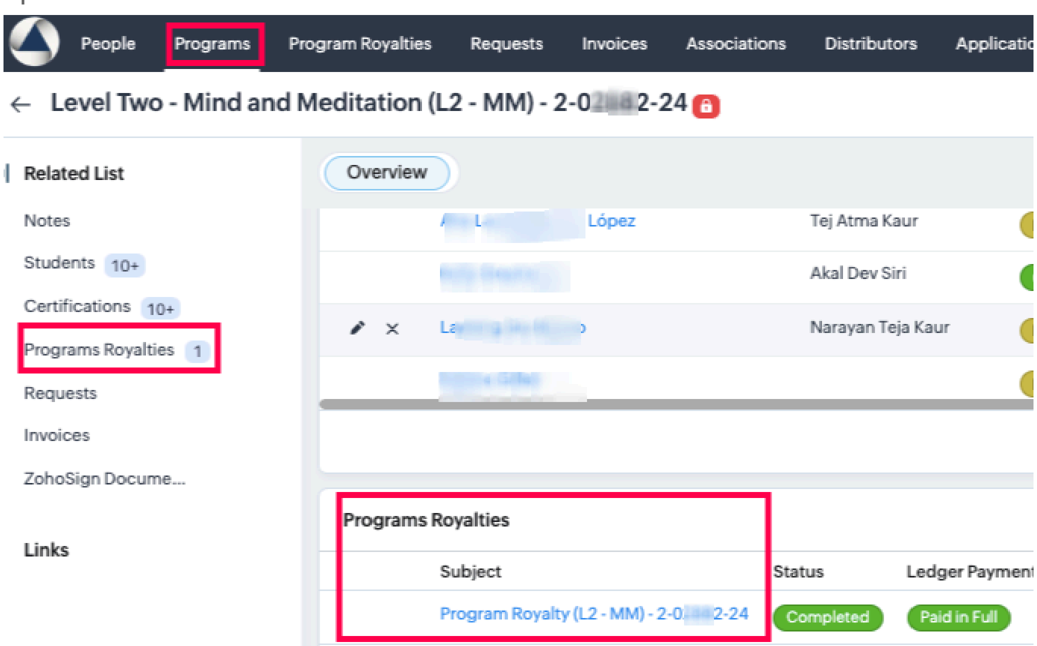
➔ **Generate Invoice and Proceed to Payment**: After KRI's review and approval, the invoice is generated. Payment can then be made by the Lead Trainer or Program Administrator.
  - Soon, payment gateways will be implemented to process payments directly through the system, but other payment methods may also continue to be used.

➔ **Royalty Payment Ledger and Status**: Once the payment is received by KRI, the record of that payment is entered here, and the payment status is updated.

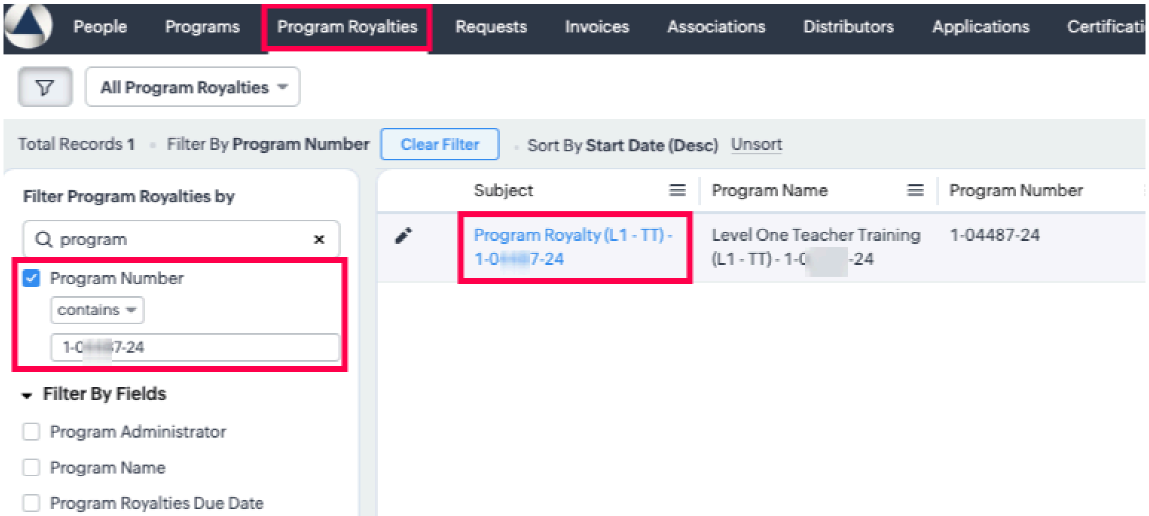
How to process the Program Royalties Payment calculation

There are **two ways** to find a Program Royalty record:

1. **Through the Program Module:**
   - Locate the program by using filters or searching in the list.
     Open the detailed view of that program.
   - In the **Related List** on the left side, you will find the corresponding Program Royalty Record.
   - Open its detailed view and edit as needed.



2. **Through the Program Royalty Module:**
    - Locate the Program Royalty record by using filters (e.g., *Program Number → contains → add program number*) or by searching in the list.
    - Open the detailed view of the Program Royalty Record and edit as needed.



VIDEO: HOW TO FILL OUT A PROGRAM ROYALTY PAYMENT CALCULATION

Tips for filling out the payment calculation

1. **Program Information**: This section is filled out automatically based on the related Program record. Contact us if any edit is needed.

2. **Training Manual Info**: Add to the Sub form:
    a. Training Manual Source/Vendor: KRI Store, Global distributor, Limited printing agreement
    b. Name of Global Distributor: Applicable if the source is a Global distributor. Select an option from the list
    c. Number of HARDCOPY
    d. Number of EBOOK
    e. Date

3. **Local Value**: Select from the lust the **currency** in which the program was charged and the conversion rate to be applied for the calculation.
    a. **IMPORTANT:** For the formulas to work, you must enter the **exchange rate first**—before adding any payment calculations or deductions. Use a reliable currency converter to determine the rate from **local currency to U.S. dollars**.
    b. If calculation is done in USD, add conversion rate as 1.

4. **Deduction per Student (only for L1 Programs) — AFTER ADDING THE EXCHANGE RATE ABOVE**: Select from the list of allowed deductions, the ones included on your program price.

5. **Payment Calculation**: Add rows to the sub-form, indicating quantity of students and the amount paid by those students.
    a. Trainer fills out the first THREE COLUMNS (Product Name, Student Quantity, Local Value)
    b. The remaining columns are filled out automatically by the system, applying the conversion rate to the local value (Local Total ($), Value ($) and Total ($))
    c. Based on the exchange rate entered in the Local Value section, the system automatically calculates the number of students included in the calculation, as well as the total amounts in local currency and in U.S. dollars.
6. **Royalties Due**: Select the type of fee (10% or Flat Rate). The system calculates the total amount due in U.S. dollars.
7. **Submit Royalty Description**: Update the status to **YES**, once the calculation is finalized, so it can be sent for KRI's review and approval.
8. Payment calculation will be reviewed and **INVOICE generated** and sent to you via E-mail. **Proceed with the payment** according to the instructions and available payment methods.

IMPORTANT: STUDENT LIST NEEDS TO BE PROVIDED AT THIS POINT

According to KRI policy, the **Student List** with all students enrolled in the course must be provided by the **Program Royalties due date**.

- If a student dropped out **before** the royalties due date, you do not need to include them on the list.
- Send the completed Student List via **email** or through the **Request Module** in the CRM.
- It is **essential** to use the **correct template** and follow the **exact formatting instructions** for each column.
    - L1 Student List Template
    - L2 and 21 Stages List Template
- We recommend **making a copy** of the KRI template, since the Excel file has sometimes shown errors in the country dropdown list.

At this stage, all students may appear with a **Pending** status and **no completion date** entered.

The ATA Admin Team will then import the list into the corresponding program in the CRM.