Setting up a demo account

Anyone in your operations or implementation department should be able to set you up with a demo account. Have them onboard a new fictitious client under a dummy employer (FEIN). Give them a client ID beginning with "777" followed by two numeric characters (example: 77701). Depending on how many sales people are on your team, you may want to create numerous demo clients for them to use. I've worked in environments where each salesperson had their own account, and I've also worked in environments where each team shared an account and used a shared calendar to make sure that the salespeople didn't schedule demos at the same time. Both worked well, but if you have salespeople sharing a demo account, then it's incredibly important to make sure that they are checking the calendar for availability before jumping into a demo site.

Should your operations or implementation team need some guidance on how to set up the demo account, you can provide them the checklist below for some guidance.

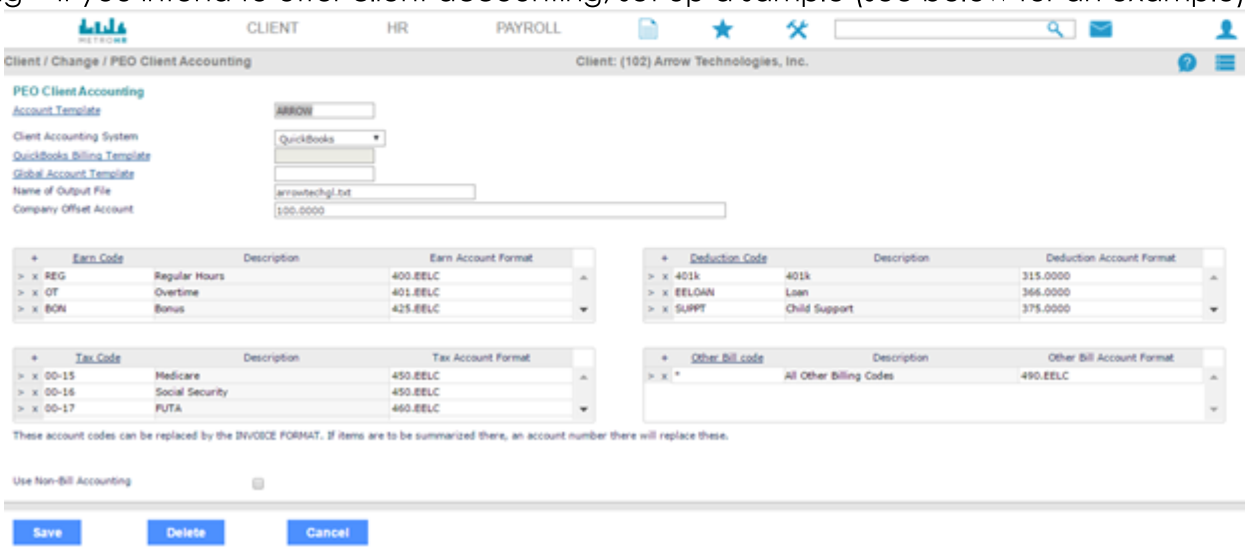
<u>Set up your demo client</u>

- Have a logo for your demo client(s)
  - Logo should be up to 40 pixels tall and 130 pixels wide for Manager Self Service
    - For Employee Self Service you can use a logo up to 70 pixels tall and 250 pixels wide
    - Onboarding also has the option to brand for a client.
- Set up demo employer in Employer Details
  - Assign FEIN and state EINs
  - Set up any relevant SUTA bill and accrual rates
- Set up demo bank accounts
- Set up demo client in Client Details
  - Complete all required fields (account assignments, GL templates, processing schedule, billing template, etc)
  - Assign demo bank accounts
  - Configure ESS theme and demo company logo if you want to show something other than the service provider logo
  - Set up client worksite payroll approval or to allow payroll self-service
  - Configure time sheet options and import definitions, if applicable
- Add relevant work site locations
- Add relevant department and/or division codes
- Create a pay group and set up a weekly payroll cycle

- Create position/job titles
- Create group benefit plans
- Hire and onboard new employees (we would recommend at least 15)
    - Make sure you leave one onboarding workflow not finished so the salesperson can show and talk through how it works

Things to consider

- Set up payroll as self-service to show off the ability for the client to have more control
- If you use both bundled and unbundled formats, you may want to set up at least two different clients
- Pick a generic name and come up with a logo. Something better than "Demo Customer"
- Have realistic positions/job titles with corresponding WC Class
- Create a benefit offering that has variety and highlights the types of plans you prefer
- Client Accounting - if you intend to offer client accounting, set up a sample (see below for an example)



- Configure a sample payroll import and have a sample file available
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- Make sure you leave one onboarding workflow not finished so the salesperson can show and talk through how it works