

The background features several thick, wavy green lines that curve across the page, creating a sense of movement and flow. The lines vary in thickness and shade, ranging from a dark forest green to a lighter, lime green.

Sage North America Solution Provider branding guidelines

A comprehensive resource for Solution Providers

February 2012



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Overview

The goal of the *Sage North America Solution Provider branding guidelines* (the “Guidelines”) is to provide Solution Providers with the ability to communicate in tandem with Sage. Together, as one consistent, unified voice, we can increase the effectiveness of our marketing efforts while maintaining the integrity of the Sage brand.

The intent is for Solution Providers to adhere to these Guidelines to strengthen marketing and web strategies over the long term. Using these directives designed to help Sage brand its software solutions uniformly through its business partner channel and its accounting and bookkeeping recommender channel, we can successfully reach out to our installed base of customers in addition to prospects in targeted markets.

Solution Provider marketing communication efforts are an important part of the endeavor to present one face to customers and to build a strong brand. Any Solution Provider that uses the Sage Solution Provider logo, web banners, or other Sage provided or influenced marketing materials must adhere to the guidelines in this handbook. Solution Providers are always encouraged to use the Sage marketing launch materials provided to them to present a unified, cohesive message to our customers about Sage and Sage products.

About trademarks and service marks

To protect the valuable trademarks, service marks, and trade name rights owned by the Sage family of companies (collectively “Sage”), these Guidelines must be followed. The Guidelines will answer most questions regarding the use of the Sage marks and trade names. When in doubt, however, please contact us at ChannelSales@sage.com for clarification.

The proper use of the Sage marks and trade names is critical to the continued success of our collective commercial efforts. Sage has devoted significant resources to promoting its products, services, and corporate identity. By adhering to these Guidelines for proper use of marks and trade names, Sage authorized business partners, authorized consultant partners, Certified Consultants, Solution Providers, Certified Trainers, Premier Advisors, distributors, development partners, software integration partners, and other colleagues—along with Sage employees—will ensure that customers continue to recognize the quality and value of Sage products and services.

Absent express written authorization from Sage, no third party may use “Sage,” “Sage Software,” any Sage trademark, any Sage product or service names, or any confusingly similar marks or names or portions thereof as its business name, trademark, domain name, member name, user ID, or as part of an email address or as part of any social media identification.

Sage will require any such prohibited use to immediately be ceased and the name and/or domain name be transferred to Sage within a reasonable time established by Sage.

If you become aware of any unauthorized use of a Sage mark or trade name, please contact us immediately at ChannelSales@sage.com.

Definitions

As used in these Guidelines, the terms are defined below as follows:

Trademark: Any word, phrase, symbol, logo, or other device (or any combination thereof) that is used by Sage to identify and distinguish its products (for example: Sage HRMS software).

Service mark: Any word, phrase, symbol, logo, or other device (or any combination thereof) that is used by Sage to identify and distinguish its services (for example: Sage Business Care update and upgrade service). A service mark is a trademark—the term simply makes a distinction between products and services.

Trade name: A trade name is a common name used to represent the business instead of the legal name (for example, Sage or Sage North America instead of Sage Software, Inc.).

Copyright: A form of protection provided by law to the authors of “original works of authorship,” including literary, dramatic, musical, artistic, and certain other intellectual works (including computer software). Copyright law generally gives the owner of the copyright the exclusive right to do and to authorize others to:

- Reproduce the work in copies.
- Prepare derivative works based upon the work.
- Distribute copies of the work to the public by sale or other transfer of ownership (for instance, licensing).
- Perform and display the work publicly (such as literary, musical, dramatic, film sound recordings, and so on).

Branding elements

Company name

Correct usage of the Sage name in materials is important to maintaining corporate identity and reinforcing branding efforts. The company should be referred to as Sage (or Sage North America, when appropriate) in all marketing documents and similar literature.

Product and service names

Trademark rights can be jeopardized if marks are not used properly. Accordingly, in all print and electronic publications (for example: press releases, advertisements, marketing materials) and product packaging, please follow these guidelines.

1. Trademarks or service marks should not be abbreviated.

For example, both “Sage” and “Sage 300” are trademarks of Sage. When speaking of a specific product, please refer to it by its complete name “Sage 300 ERP” rather than shortening it to the product family name of “Sage 300.” In addition, a trademark must be followed by the generic word it relates to, as marks should be used as adjectives and not nouns. Therefore, generic words such as *software*, *technology*, *application*, and *system* should be used immediately after a reference to the mark as much as possible.

A complete list of proper Sage product and service names will be included in the brand kits made available to Solution Providers in April 2012. The list of new Sage product names that will take effect before the end of 2012 is available in Appendix II of this document.

Incorrect:

- Sage 300 ERP can be used with other Sage products. For example, Sage HRMS can work seamlessly with it.
- Sage 300 ERP and Sage Pro ERP are complete accounting solutions. They may be used with numerous add-on modules. Sage 300 Order Entry is one of the most popular modules.

Correct:

- Sage 300 ERP software solutions can be used with other Sage products. For example, Sage HRMS can work seamlessly with it.
- Sage 300 ERP and Sage Pro ERP are complete ERP solutions. They may be used with numerous add-on modules. Sage 300 ERP Order Entry is one of the most popular modules.

2. Do not use marks in the possessive or plural form.

Incorrect:

- Sage’s efficiency is outstanding.
- Five Sage 50—Canadian Editions were sent out yesterday.

Correct:

- Sage financial services are highly efficient.
- Five Sage 50—Canadian Edition programs were sent out yesterday.

3. Absent express written authorization from Sage do not combine a Sage trademark or product name with a third-party trademark or product name.

Incorrect:

- Sage 500 ERP Crystal Reports® is available . . .
- Primavera Sage 300 Construction and Real Estate products are integrated.

Correct:

- Crystal Reports® for Sage 500 ERP software system . . .
- Primavera products are integrated with Sage 300 Construction and Real Estate.

Naming conventions for Sage Authorized Third-Party partners' products and solutions

As we move into the next phase of branding for Sage products in North America, we have an opportunity to standardize how we name the many products and solutions that not only Sage offers but our valuable partners offer as well.

Sage basically has six distinct categories for our partner relationships, and they can be broken out as follows:

1. OEM
2. OEM with Intellectual Trademark (IT)
3. Endorsed Partners
4. Endorsed Partners/OEMs
5. Affiliates
6. Sage Development Partner

Partners in this category have maintained current status in the authorized Sage Development Partner Program. Partners in this category cannot, absent express written authorization from Sage, combine a Sage trademark with their company name or product solution name/s. Further information can be found at: www.SagePSS.com

With five of those categories Sage will utilize three different naming conventions:

1. For OEMs the naming convention would be as follows:

Sage xxx OEM solution name

2. For OEMs with IT the following would apply:

OEM company OEM solution name for Sage xxx

3. For Endorsed Partners, OEMs/Endorsed Partners, and Affiliates the naming convention would be as follows:

Sage xxx EP/OEM solution by EP/OEM company name

Logos

The Sage logo is the most important element of our visual identity system. It is essential that Sage Solution Providers help preserve its integrity at all times by adhering to all Sage partner logo guidelines.



The role the Sage Solution Provider logos play in communications is to signify to audiences that they are interacting with a Sage Solution Provider.

DO

- Do use the Sage Solution Provider logo in conjunction with a partner company logo.
 - The Sage Solution Provider logo should appear smaller and/or less prominently.
- Do use only the partner logos for which your company is authorized.
 - For example: approved partner program logos, authorized partner logos, or any logos that require special certification.

- Do keep the Sage corporate logo on marketing materials produced by Sage.
 - The partner logo may be added to these marketing materials as long as it appears smaller and/or less prominently, and all other guidelines are followed.
- Do replace the Sage corporate logo in any advertising material with the appropriate Sage partner logo.
- Do follow the clearspace guidelines when adding a partner company logo and tagline near the Sage partner logo.
- Do use the Sage partner logo in only Pantone 335 or black.

DON'T

- Don't use the Sage corporate logo on development partner-produced marketing materials, packaging, collateral, or websites.
- Don't use Sage program and award logos without approval.
- Don't make the partner company logo smaller than the Sage partner logo.
- Don't add any graphical treatments, text, or elements to the Sage partner logos, (for example: lightning bolts coming out of the logo).
- Don't place Sage product names or other information directly beneath Sage partner logos.
- Don't reconstruct, distort, or manipulate the Sage partner logos.
- Don't add any effects (for example: drop shadows or emboss) to the Sage partner logos.
- Don't alter the colors of any Sage partner or program logos.

Minimum size

The recommended minimum size for the Sage logos is 18mm across the width.



Clearspace

Clearspace is the minimum area of space around the Sage logos. To protect and ensure impact of the Sage logos, no element should infringe on the clearspace. The clearspace dimensions are specified in the diagram below.



Logo Colors

The preferred version of the Sage logos should appear in full color (Pantone 335 and 579) or the CMYK, RGB equivalent. Where color is not available, such as in a newspaper advertisement, the Sage logos should appear in black.



Examples of Sage partner and program logos



Guidelines for additional marketing elements

Partner taglines

Use of the name “Sage” or any other Sage-trademarked names in a corporate tagline is prohibited without the written consent of Sage. Taglines suggesting a higher level of endorsement or backing by Sage will be rejected.

Awards

Unless they are provided by Sage, partners may not use the graphics or icons of any awards that Sage has earned. Partners may state that Sage has won the awards but shall not make any statement that would tend to make third parties believe that their company won the awards.

Copyrighted material

Solution Providers members are not permitted to copy graphics, photographs, images, or messaging from copyrighted Sage material without express written permission from Sage.

This includes copying the Sage organic illustrations (lines, shapes, and so on) and the Sage corporate logo for use on partner marketing materials, electronic presentations, or websites.

Internet policy

The Solution Provider Internet policy applies to websites directly or indirectly owned, affiliated with, or sponsored by partner companies, and extends to third-party websites, including search engines, Internet advertising (for example: banners, URL redirects, online advertising, pay-per-click advertising, product descriptions, product titles, page headings, subheadings, copy text, blogs, and social networks (such as Twitter, Facebook, LinkedIn, and so on). By enforcing these Guidelines, the objectives are to ensure that:

- Solution Provider websites promote their business and Sage products and services in a professional and ethical manner that is not misleading to the public.
- Graphical and branding elements for Sage products and services are displayed accurately and in accordance with the Guidelines.
- Partner websites do not attempt to mimic Sage corporate or product websites in a way that misrepresents the Sage/partner relationship. Content distributed through Sage launch kits, brand communications, or made available in the Partner Portal shall be considered approved.
- Partner company names are clearly indicated on all web pages where Sage partner logos, partner logos, the Sage name, and Sage product names appear. It must be clearly apparent that a partner website is not a Sage website.

Usage of Sage marks in URLs, email addresses, and social networking sites

Absent express written authorization from Sage, no third party may use “Sage,” “Sage Software,” any Sage trademark, any Sage product or service names, or any confusingly similar marks or names as its domain name, member name or user ID, or portions thereof or as part of an email address or any social media identification.

Sage product or service names may not be included in partner email addresses or website URL domain names, including social media identification pages. However, partners may include Sage product or service names to identify supporting web pages, for example: www.ABCcompany.com/Sage100ERP

Advertising and discounts on websites

- Partners are discouraged from advertising Sage products and services at a discount on their websites with the exception of official Sage promotions and offers for products and services that they are authorized to sell (see below).
- Partners may display the Sage suggested list price (“List Price”) for products and services that they are authorized to sell. Depending on which products they represent, partners can find List Prices on the password-protected website for their particular business unit. If you don’t know where to find List Prices for your product, please contact your Inside Partner Advocate (IPA).
- Do not indicate in writing that Sage forbids displaying discounted pricing. Instead state, “These are suggested list prices from Sage. Please click here or call 800-123-4567 for a customized price quote based on your individual business needs.”

- Partners are prohibited from using absolutes or superlatives when referencing any product pricing. This includes the use of language such as “the lowest price.” Partners may not advertise “guaranteed lowest prices” on the Internet, websites, or in pay-per-click advertising or use similar phrases. The following phrases or similar such phrases are not permitted:

- Rock-bottom prices
- We will not be undersold
- Guaranteed lowest prices
- We won’t be beat on price

- Similarly, Solution Providers may not include such phrases as part of their URL addresses. For example, www.CheapSageERPMS90.com or www.CheapSage300ERP.com is prohibited.
- Partners are allowed to negotiate and charge prices lower than List Price—they just cannot advertise those lower prices on the Internet.

Official Sage promotions

Partners may advertise official Sage promotions that are discounts on their websites, as long as they follow the same expiration dates of the official Sage promotions. This means partners should remove any promotional messaging from their websites once the promotion expires. The most current promotions for specific products can be found by visiting password-protected partner websites.

Web graphics

In accordance with the following guidelines, Sage Solution Providers may create web graphics using Sage product names:

- Partners may include the product name within the web graphics.

- When using Sage product box shots as part of web graphics, partners should be sure to use the latest version.

Usage of Sage intellectual property on websites

- Solution Providers may use Sage intellectual property unaltered and exactly as is, such as white papers, flash demos, PDFs, marketing collateral, press releases, prerecorded presentations, product names, website copy, brochure copy, and more, if on every web page where Sage intellectual property appears, it is identified as “Released to Sage Solution Providers.”
- On every web page where Sage intellectual property appears, Solution Providers must also add the following phrase to the credit line statement, “Used with permission from Sage Software, Inc.” and provide a live link to www.SageNorthAmerica.com.
- For Sage intellectual property not authorized to the Solution Provider community as a whole, SAN members must receive written permission from Solution Provider Marketing before using. Send an email to ChannelSales@sage.com to request permission. When written permission is granted, partners must display the materials in the exact form specified by Sage and may not modify it in any way.
- Partners must accurately display current product names. For a complete list of proper Sage product and service names, visit: <http://www.sagenorthamerica.com/Company/Brand>
- Solution Providers are not permitted to copy graphics, photographs, images, or messaging from any copyrighted Sage material without express written permission from Sage.

This includes copying the Sage organic illustrations (lines, shapes and so on), the Sage corporate logo and any photographs or images contained in Sage marketing collateral for use on partner marketing materials, electronic presentations, or websites.

- Do ensure Solution Provider logos and product-specific graphic elements appear smaller than the Solution Provider company logo and branding elements, unless the resolution of the images when resized does not appear clearly.

Attribution on websites

Solution Provider websites must clearly and conspicuously state on the home page or, if the pages relating to Sage products are not on the home page, on the pages of the site where Sage products are offered or displayed, the following legend:

This website is owned by [company name]. [Company name] is independent from Sage and is not authorized to make any statement, representation, or warranties or grant any license or permission on behalf of Sage regarding any product, service, or website content. Certain materials made available on or through this website are owned by Sage and cannot be used without the prior written permission of Sage.

Other website dos and don'ts

- Do clearly display the partner company name and branding elements at the top of the partner website and any subdirectory pages where Sage products are mentioned and Sage development partner logos are displayed.
- Do not attempt to appear as a Sage website or as a manufacturer of a Sage product. Sage product names may be displayed at the top of a partner's web page as long as the product name is positioned at least 90 pixels away from the Solution Provider's company logo.

Social media policy

Sage encourages active participation by Solution Providers on social media and networking sites, including Twitter, Facebook, LinkedIn, YouTube, and Sage online product communities. Individuals and businesses that choose to contribute on social media sites—while representing themselves in a Sage Solution Provider capacity—should adhere to the following guidelines:

- Solution Providers may not register or use account names or handles that include the Sage trademark or Sage product names.
- Solution Providers may not use the Sage trademark or Sage logos, global branding illustrations, box shots, and other copyrighted material for backgrounds, logos, or avatars.
- Solution Providers may not present themselves as official spokespersons for Sage or Sage product lines.
- Solution Providers are encouraged to identify themselves as Solution Providers or Certified Consultants in their biographies on social media sites.

Attributions, trademark symbols, and credit lines

Use of trademark and registration symbols (™ SM ®)

The Sage policy is that the appropriate trademark symbols (® ™ SM) must be used with any of the Sage product and service names at the first and most prominent reference on each separate piece. Additionally, trademark symbols must be used in the instances where Sage is contractually obligated by a third party to do so. You must add a symbol to the brand trademarks for Crystal Reports®, UPS®, GoToMyPC®, GoToMeeting®, GoToWebinar®, GoToAssistExpress®, AccessYourPCfromAnywhere®, Microsoft® SQL Server®, Windows®, and Windows Vista® for every first reference in body copy only, as well as attribute their corresponding legal credit line (see “Attribution of specific third-party marks” to the right). These third-party requirements are subject to change, and updated information can be found at the Sage North America copyrights and trademarks page: http://www.SageNorthAmerica.com/Copyright_Trademarks. This policy applies to all materials, including advertising, marketing collateral, documentation, user interface elements, and logos used in any media. Please adhere to respective trademark owners’ trademark usage guidelines for all other third-party trademarks. If such symbols are used in user interface elements or materials already published or “frozen,” there is no need to redo the materials to remove the symbols.

Attribution of Sage in credit lines

All uses of Sage marks must be accompanied by a credit line toward the bottom of the piece (for example: packaging, electronic communications, or other collateral). Please use the language outlined below. Each credit line should lead with “Sage.” Credit lines must also include any specific attribution of third-party marks that Sage is contractually obligated to list in the credit line. Finally, a general attribution should be included to cover all other third-party marks. The following credit lines should appear in a type size of at least eight points:

For printed material:

Sage, the Sage logos, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. [Insert contractually obligated trademarks here.] All other trademarks are property of their respective owners.

For third-party websites:

This website is owned by [company name]. [Company name] is independent from Sage and is not authorized to make any statement, representation, or warranties or grant any license or permission on behalf of Sage regarding any product, service, or website content. Certain materials made available on or through this website are owned by Sage and cannot be used without the prior written permission of Sage.

Attribution of specific third-party marks in credit lines

Sage and its Solution Providers are contractually obligated to include specific credits in the credit line and insert appropriate trademark symbols on specific third-party marks. Please use the exact wording below as part of the legal credit line if a piece or packaging contains the following third-party trademarks:

- Business Objects and the Business Objects logo, BusinessObjects, and Crystal Reports are trademarks or registered trademarks of Business Objects Software Ltd. in the United States and in other countries.
- UPS, the UPS brandmark, and the Color Brown are trademarks of United Parcel Service of America, Inc.
- GoToMyPC, GoToMeeting, GoToWebinar, GoToAssistExpress, and AccessYourPCfromAnywhere are trademarks of Citrix Systems, Inc. and/or one or more of its affiliates and may be registered in the United States Patent and Trademark Office and in other countries.
- Microsoft, SQL Server, Windows, Windows Vista, and the Windows logo are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.
- **First penalty:** Removal from the “Find a Partner” locator tool until compliancy is met. If the partner website is not in compliance within 30 days, the partner will immediately enter the second penalty phase.
- **Second penalty:** Loss of benefits included in the first penalty, along with the loss of Priority Customer Support. Plus, exclusion from events such as Sage Summit, and training opportunities provided. If the partner website is not in compliance within 30 days of entering the second penalty phase, the partner will immediately enter the third penalty phase.
- **Third penalty:** Termination of Solution Provider membership, including all the software and program benefits included.

Penalties are subject to change.

Violations

Penalties

Sage Solution Providers who violate the Sage Business Solutions partner branding guidelines will be notified by email and will have seven calendar days to rectify the issue. If the issue is not resolved after seven days, the Solution Provider will receive a second and final written notice with 30 days to resolve the matter. Partners cannot repeatedly violate the policy to take advantage of the 30-day grace period to fix the issue. Failure to resolve the issue will result in the three following penalties:

Appendix I: Sage product names

The following outlines the new Sage product numbering system along with the corresponding original Sage product names:

Universal Solutions

Current Name	New Name
SageCRM	Sage CRM
Sage FAS Fixed Assets	Sage Fixed Assets
Sage FAS Gov Fixed Assets	Sage Fixed Assets Government Edition
Sage FAS Nonprofit Fixed Assets	Sage Fixed Assets Nonprofit Edition
Sage FAS Canada Fixed Assets	Sage Fixed Assets Canadian Edition
Sage Abra SQL HRMS	Sage HRMS
Sage Timberline Estimating	Sage Estimating

Financial Solutions

Current Name	New Name
Sage 50	
Sage Peachtree	Sage 50—U.S. Edition
Sage Peachtree First Accounting	Sage 50 First Accounting
Sage Peachtree Pro Accounting	Sage 50 Pro Accounting
Sage Peachtree Complete Accounting	Sage 50 Complete Accounting
Sage Peachtree Premium Accounting	Sage 50 Premium Accounting
Sage Peachtree Quantum	Sage 50 Quantum Accounting
Sage Peachtree Pro Accounting with Payroll	Sage 50 Pro Accounting with Payroll
Sage Peachtree Premium Accounting for Construction	Sage 50 Construction Accounting
Sage Peachtree Premium Accounting for Distribution	Sage 50 Distribution Accounting
Sage Peachtree Premium Accounting for Manufacturing	Sage 50 Manufacturing Accounting
Sage Peachtree Premium Accounting for Nonprofits	Sage 50 Nonprofit Accounting
Sage Peachtree Quantum – Accountants' Edition	Sage 50 Accountant Edition

Financial Solutions

Current Name	New Name
Sage 50 (cont.)	
Sage Simply Accounting	Sage 50—Canadian Edition
Sage Simply Accounting First Step	Sage 50 First Step Accounting
Sage Simply Accounting First Step – Express	Sage 50 First Step Express Accounting
Sage Simply Accounting Pro	Sage 50 Pro Accounting
Sage Simply Accounting Pro with Payroll	Sage 50 Pro Accounting with Payroll
Sage Simply Accounting Premium	Sage 50 Premium Accounting
Sage Simply Accounting Premium with Payroll	Sage 50 Premium Accounting with Payroll
Sage Simply Accounting Enterprise	Sage 50 Quantum Accounting
Sage Simply Accounting – Accountants' Edition	Sage 50 Accountant Edition
Sage Simply Accounting HR Manager	Sage 50 HR Manager
Sage 50 Accounting (English/Spanish)	
Sage Simply Accounting First Step (English/Spanish)	Sage 50 First Step Accounting—Spanish Bilingual Edition
Sage Simply Accounting First Step – Express (English/Spanish)	Sage 50 First Step Express Accounting—Spanish Bilingual Edition
Sage Simply Accounting Pro (English/Spanish)	Sage 50 Pro Accounting—Spanish Bilingual Edition
Sage Simply Accounting Premium (English/Spanish)	Sage 50 Premium Accounting—Spanish Bilingual Edition
Sage Simply Accounting Enterprise (English/Spanish)	Sage 50 Quantum Accounting—Spanish Bilingual Edition
Sage Simply Accounting – Accountants' Edition (English/Spanish)	Sage 50 Accountant Edition—Spanish Bilingual Edition
Sage 100	
Sage ERP MAS 90 and 200	Sage 100 ERP
Sage ERP MAS 90 Online	Sage 100 ERP Online
Sage ERP MAS 90	Sage 100 Standard ERP
Sage ERP MAS 200	Sage 100 Advanced ERP
Sage ERP MAS 200 SQL	Sage 100 Premium ERP
Sage Fund Accounting	Sage 100 Fund Accounting
Sage Master Builder	Sage 100 Contractor
Sage 300	
Sage ERP Accpac	Sage 300 ERP
Sage ERP Accpac Online	Sage 300 ERP Online
Sage ERP Accpac 100	Sage 300 Standard ERP
Sage ERP Accpac 200	Sage 300 Advanced ERP
Sage ERP Accpac 500	Sage 300 Premium ERP
Sage Timberline Office	Sage 300 Construction and Real Estate
Sage Timberline Enterprise	Sage 300 Trade Specialty
Sage 500	
Sage ERP MAS 500	Sage 500 ERP

Solutions with Unchanged Names

Current Name
Business Solutions
Sage ACT!
Sage Active Planner
Sage BusinessVision Accounting
Sage BusinessWorks Accounting
Sage DacEasy
Sage ERP X3
Sage Fundraising 50
Sage Fundraising 100
Sage Millennium
Sage PFW ERP
Sage Pro ERP
Sage SalesLogix
Sage TimeSheet
Sage Timeslips

Current Name
Connected and Standalone Services
Sage ACH Processing
Sage Billing Boss
Sage Check Processing
Sage Credit and Debit Card Processing
Sage Fundraising Online
Sage Grant Management
Sage Project Lifecycle Management

Appendix II: Brand transition handbook

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Introduction

A note to our Solution Providers

Hello Everyone,

I have talked a lot about our Sage brand over the past several months. You've heard me tell stories about how well known our brand is in other parts of the world, while here in North America most people haven't heard of Sage. They typically know us by one of our products, but not as a master brand.

Making our presence known in North America means differentiating the Sage brand. We have the means to compete and win where our competitors are weak: through **Extraordinary Customer Experience**.

This means we have to first feed our brand by creating a common user interface and integrating products across our Sage line. With this integration come common components such as our Sage Advisor and Sage Business Care. And we must establish consistent connected services, online business solutions, and recognizable go-to-market strategies. Once we have done these things, the market will recognize our strong commitment we have to providing an **Extraordinary Customer Experience**. So strong, in fact, that it is embedded deep within our Sage culture.

This is how we won in other parts of the world, and this is how we will win in North America. As our partner, you are an integral part of this process. One of the key steps in our work to deliver a strong Sage brand to customers and prospects is to deliver a master brand structure for our product names. This Solution Providers toolkit will serve as a resource for you as we transition our products to this Sage master brand structure. It will not be a quick process, and it won't be easy. But then again, anything worth doing rarely is.

We look forward to taking this journey of personal commitment to the Sage master brand together.

Best regards,

Pascal Houillon
CEO
Sage North America

Bringing the Sage brand to life

As Pascal's introduction suggests, changing the name is just a small fraction of what is involved with a brand change. It is one step in a longer journey to bring meaning to the Sage brand in North America, meaning that allows us to win against our competition, expand into other markets and adjacencies, and drive financial growth for Sage and for you, our partners.

This also involves having a personal belief that this is the right path for us, which results in a commitment to making it happen. It's followed by strong execution as we make this transition and a continued focus of delivering on the Sage brand meaning—a meaning that is about the total customer experience—an extraordinary customer experience that drives financial growth for Sage and for our partners.



Working together toward a common goal

As a Sage Solution Provider, you share our focus of serving small to mid-sized companies to help make their business lives easier. We are stronger together as “Sage” than any one of our product brands in our portfolio.

But for us both to benefit, we need to take steps to grow the Sage brand in North America to beat our competition. Specifically, we have to be willing to let go of the iconic product brands we’ve supported for years.

Taking steps to develop the brand

A brand change is not as easy as flipping a switch. Sage ERP Accpac doesn't become Sage 300 ERP in an instant. It takes time. That's why we've developed a year-long plan to transition many product names to a new product numbering system, allowing ample time to introduce and develop name recognition among our existing customer base as well as prospects.

For example, we cannot allow our customers to walk into Staples in May and see Sage 50 on a shelf with no visual correlation to the Sage Peachtree brand. Likewise, our web properties must help customers understand that Sage ERP Accpac is becoming Sage 300 ERP. That connection will be there. We are committed to working with you in the coming months to ensure that our messaging is crisp and minimizes confusion. We are taking this process very seriously.

Delivering on the brand meaning

Our brand initiative is more than changing the names of our products. Our goal is to deliver an extraordinary customer experience, superseding what any one Sage product has to offer. From the purchasing process to the day-to-day use of our products to every communication with Sage or our Solution Providers, this experience is what will differentiate Sage from the competition.

We want to become a brand that is so differentiated in the market that customers and prospects understand what it means and stands for and want to do business with us because of it. This is the sort of differentiation that will help us—and our partners—achieve financial growth.

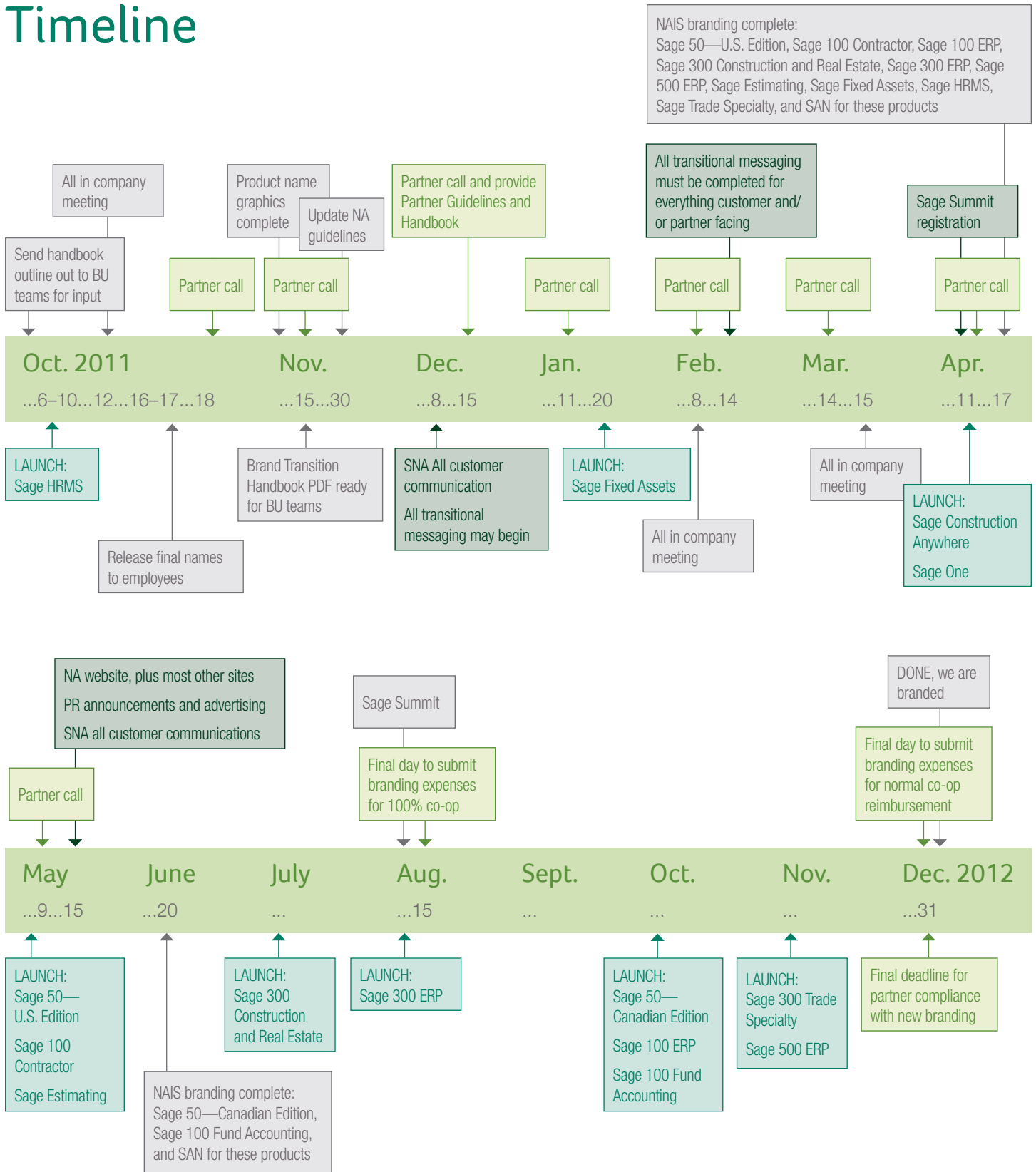
In order to make all of this happen, we have to go back to the personal commitment component. The tactics of the execution—changing our product brands—is the easy part. Delivering the meaning today and for years to come requires the commitment of everyone at Sage and of every Sage Solution Provider. In fact, the future success of our Sage brand is up to us and our collective commitment to providing an Extraordinary Customer Experience.

Planning for the transition

Many of the items you may use will be impacted by the transition to our Sage brand. Over the past few years the vast majority of our materials have been changed to show only the Sage name, but this is a great opportunity to check once more to make sure these changes have been made. While it may be difficult to remember everything that should be included in the brand change, here is a list of items to consider:

- Business cards and stationery
- All website pages and print materials that reference Sage products or services
- Tradeshow banners and displays
- Text and artwork for all online and print ads
- Direct marketing pieces such as email and direct mail
- Telemarketing and other call scripts
- Marketing merchandise and giveaways
- Demo Images
- In-product references

Timeline



As of January 20, 2012

Product | Partner | Communication | Other

New solution descriptions

Sage is the world leader in financial management applications for small and midsize businesses (SMBs)* with a portfolio of business management solutions that helps businesses more easily manage their operations.

Sage 50

Sage 50 is the Sage small business family of accounting, business intelligence, payroll, and human resources software and services that is designed to streamline your day-to-day processes and make your life easier. Sage 50 is easy to set up and use and is backed by Sage Business Care and Sage Advisor Technology to ensure you get the most from your investment. Sage 50 grows as your business grows by providing editions with increasing levels of functionality. Available in a U.S. Edition and Canadian Edition, Sage 50 also comes in an Accountant Edition specifically for Sage Accountants Network members and our Solution Providers. Sage 50—U.S. Edition is available for specific industries, including manufacturing, distribution, construction, and nonprofit.

Sage 100

Sage 100 is the Sage family of business management software and services for midsize businesses, organizations, and practices with a focus on North America. It supports configuration options to best match your needs and delivers a low total cost of ownership. Sage 100 includes ERP, Fixed Assets, HRMS, and specialty solutions for construction and nonprofit organizations, plus integration with Sage CRM solutions. Sage 100 solutions are sold and supported through local business partners, are backed by Sage Business Care, and will be implementing Sage Advisor technology to ensure you get the most from your investment. Sage 100 grows as your business grows by providing versions to support the business growth cycle.

Sage 300

Sage 300 is the Sage family of business management software and services for midsize businesses and organizations and is available internationally. It supports configuration options to best match your needs and delivers a low total cost of ownership. Sage 300 includes ERP, Fixed Assets, HRMS, and specialty solutions for construction and real estate businesses, plus integration with Sage CRM solutions. Sage 300 solutions are sold and supported through local business partners, are backed by Sage Business Care, and will be implementing Sage Advisor technology to ensure you get the most from your investment. Sage 300 grows as your business grows by providing versions to support the business growth cycle.

Sage 500

Sage 500 ERP is the highly customizable Sage ERP system for midsize businesses, organizations, and practices, typically larger companies with advanced requirements. Sage 500 ERP is designed for robust financial needs, often requiring customization or higher degrees of configuration and optimization. Sage 500 ERP is available with complementary CRM, Fixed Assets, and HRMS, plus specialty solutions for construction and real estate businesses and nonprofit organizations. Sage 500 products are sold and supported through local business partners, are backed by Sage Business Care, and will be implementing Sage Advisor technology to ensure you get the most from your investment.

**IDC, WW Financial Accounting Applications Vendor Shares report, IDC # 228969.*

Sage HRMS

Sage HRMS is a comprehensive human resource management system for small and mid-sized businesses. Available alone or integrated with Sage 100, 300, and 500 families of business management solutions, Sage HRMS helps streamline day-to-day administrative tasks and provides insights that will help you manage, forecast, and implement effective strategies to make positive changes to your bottom line.

Sage construction and real estate solutions

Sage construction and real estate solutions include Sage 50 Construction Accounting for smaller contractors who want an easy-to-install accounting solution with robust job costing, progress billing, and industry-specific reports; Sage 100 Contractor for construction-specific functionality that addresses all phases of the business profit cycle including accounting and operations management; and Sage 300 Construction and Real Estate and Sage 300 Trade Specialty for mid-sized businesses that have advanced needs for integrated accounting, job cost, project management, estimating, and service management processes. Sage Estimating provides the ability to create more estimates in less time and to increase the bid-to-win ratio for any size company.

Sage nonprofit fundraising and fund accounting solutions

Sage nonprofit fundraising and fund accounting solutions include Sage 50 Nonprofit Accounting for smaller organizations that want an easy-to-install, standardized solution and Sage 100 Fund Accounting for organizations that need to track and report on multiple funds across multiple budget periods to meet their reporting requirements and demonstrate accountability.

Sage Business Care

At Sage, our focus is on our customers' success. And there's no better way to protect and extend a Sage software investment than with a Sage Business Care plan, which delivers value to organizations by helping to reduce the time, resources, effort, and cost of operating Sage solutions.

There are three Sage Business Care plans—Gold, Silver, and Bronze. All plans include automatic access to software updates as soon as they become available; many of these updates are based on requests from Sage customers.

The Sage Business Care Gold plan includes unlimited phone support, online chat, and more, but all Sage Business Care plans offer access to support from our in-house customer care staff as well as our extensive network of business partners, certified consultants, and authorized training centers. Plans also include access to our online knowledgebases, discounted and free online training, and much more.

Sage Advisor

The Sage Business Care program is further enhanced by the deployment of Sage Advisor technology. Currently, this technology feeds Sage product planners with ongoing monitoring of how customers use the software on a day-to-day basis, allowing quick and accurate identification of important areas to enhance. In the future, Sage Advisor technology will also proactively provide customers with personalized training and advice recommendations when needed.

Sage Connected Services

Sage Connected Services are web- or mobile-based business services—such as credit card processing and data security. These services connect with Sage solutions, adding to the richness and functionality of the overall implementation.

Transitional messaging

The following is our recommendation for phrasing as we transition from legacy product naming to our new branding structure:

Initial messaging

Starting in December 2011, Sage product websites and applicable communications will include a phrase alerting customers to the new name. Customer-facing communications from Sage will have this message in place by February 14, 2012.

Example:

Sage Timberline Office **is becoming** Sage 300 Construction and Real Estate.
Sage ERP MAS 90 **is becoming** Sage 100 Standard ERP.

Postchange messaging

After each product delivers its new version and transitions to the numbered approach, the Sage product websites and applicable communications will include a phrase acknowledging the legacy name for a to-be-determined amount of time.

Example:

Sage 300 Construction and Real Estate, **formerly** Sage Timberline Office . . .
Sage 100 Standard ERP, **formerly** Sage ERP MAS 90 . . .

Please follow the timeline on the PMRC to monitor exact product name changeover dates.

Display ads

Once a product name has transitioned to the new name online, display ads can use the following if necessary.

Example:

Sage Timberline Office **is now** Sage 300 Construction and Real Estate.
Sage ERP MAS 90 **is now** Sage 100 Standard ERP.

Drop-down lists and folder structures

For drop-down lists, folder structures, and where space is limited, a condensed version of the legacy product name may be inserted in brackets following the new product name for clarity.

Example:

Sage 300 Construction and Real Estate [Timberline Office]
Sage 100 Standard ERP [MAS 90]

Communications

Communications with customers and prospects

Communicating the brand change to customers and prospects involves everything from an introduction to why the brand is changing to supporting elements such as how to present the brand on websites, invoices, and other points of contact.

This section provides guidance on how and when Sage will communicate with external audiences. Please refer to it to determine how you can participate.

To provide you with context, here is how external communication is flowing to customers and prospective customers:

Customers:

- Customers received a message from Sage on December 8, 2011, announcing the new product naming strategy. The communication introduced the concept of the name change to let customers know that these new names will come into use over the course of 2012. It provided a high-level view, explaining why we are updating product names and offering a grid that shows current and new names. It will reinforce our commitment to product development and provide insight into common experience elements such as Sage Business Care and Sage Advisor. The bulk of the communication is in the brand microsite, which you can see [here](#).
- This will be reinforced in late March or early April in the announcement of Sage Summit open registration, which will promote the new product names.
- It will be reinforced again in a May email when the majority of our websites are updated with the new brand names.
- Sage business units will deliver additional transition communications to their customers within the normal flow of their customer communications.

Prospects:

- Prospective customers who visit Sage websites will begin to see transitional messages in January that inform them that some Sage product lines will be changing names in the coming months.
- In May, many of the websites will refer to products by the new names. Prospecting email and direct mail, including cross-sell materials, should refer to new product names at this point.

Web

- Prospects and customers who visit Sage websites will begin to see transitional messages in December 2011 that inform them that some Sage product lines will be changing names in the coming months.
- In May 2012, most websites and Sage North America will refer to products by the new names and transitional messaging referencing the old names.
- By December 2012, all websites will have transitioned to the new naming. In some cases transitional messaging may remain in place to assist is ongoing Search Engine Marketing.

Key Dates

December 9, 2011: Partners may begin using either transitional language or new branding.

December 14, 2011: Any new product videos, success stories, testimonials, or white papers created after this date must be in compliance with the new branding guidelines.

December 31, 2012: Final date to meet all branding guidelines.

Resources

- Resources will be provided in a “Brand Transition Kit” in April 2012
- Resources available on the Partner Portal
- Product specific resources available with product launch

[Partner FAQ](#)

[Brand microsite](#)

The information contained in this document represents the current view of Sage on the issues discussed as of the date this document was prepared. Sage cannot guarantee the accuracy of any information presented after the date of publication. Contact Sage for the most current information. This document is for informational purposes only and may not be distributed to third parties. **Sage makes no warranties, expressed or implied, in this document.** Reproduction in whole or in part without permission is prohibited.



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