Sage ERP X3 Cloudbook FAQ

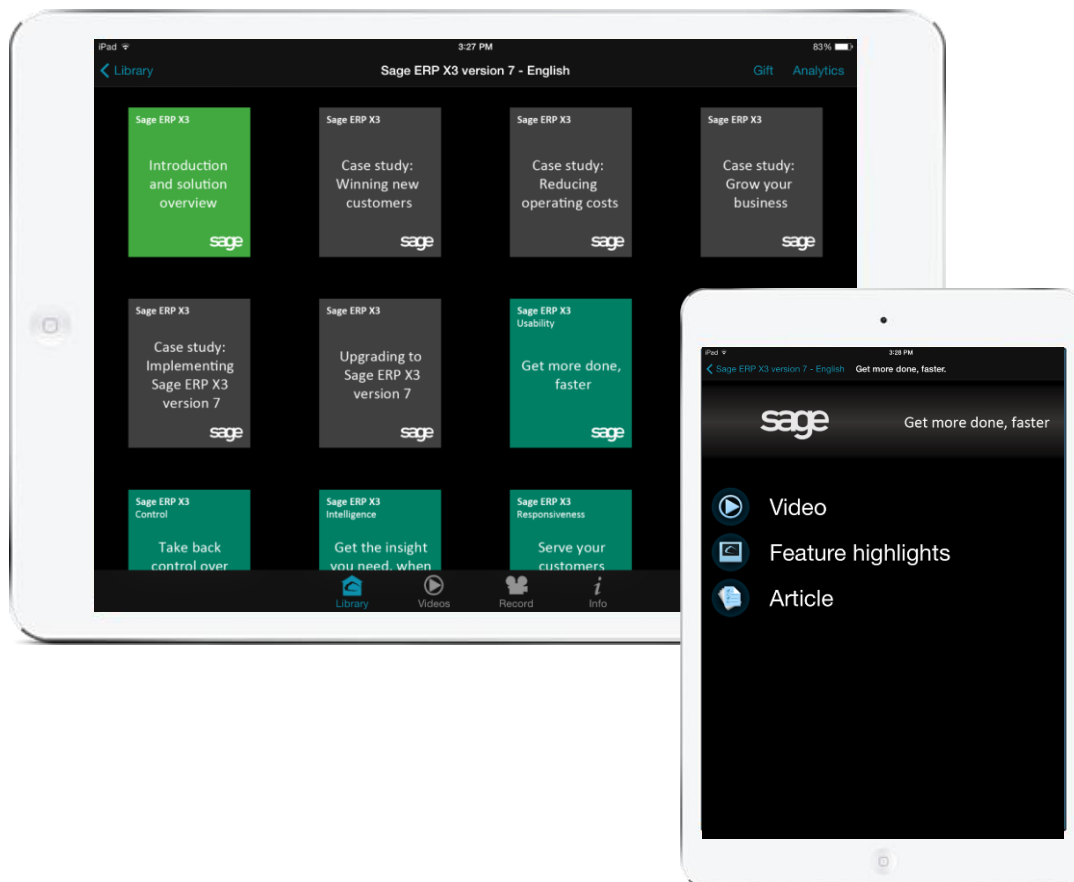### What is the Sage ERP X3 Cloudbook?

The Sage ERP X3 Cloudbook is your sales kit on the go. It helps you quickly **learn about the solution** to prepare for meetings, **present Sage ERP X3** and **share information** with customers, all from your tablet or smartphone. You can also share content with customers and monitor their interest with at-a-glance analytics of their usage.

What content is available on the Sage ERP X3 Cloudbook?

The Sage ERP X3 Cloudbook includes content to support customer conversations at any stage of the purchasing process. From solution overview presentations to documentation on the product features and benefits, it features essential information about Sage ERP X3 version 7 for you to learn about product messaging, packaging, features and benefits; as well as educational and presentation material to support conversations with customers and prospects.

At the palm of your hand, easily fire up a case study, demo video, or fact sheet to support a discussion or present the solution in customer meetings. The content is organized in chapters or topics easily accessible to quickly adapt to your customers' specific interest: overview, use cases, mobility, accessibility, global management features, etc.

Private chapters –that can't be shared with customers– also include information for internal use only, such as the messaging guide, pricing, and competitive battle cards.

How can I get access to the Sage ERP X3 Cloudbook?

The Cloudbook is available to Sage ERP X3 sales teams and partners only.

For Sage employees, go to URL http://www.cloudbook.net/users/user-app-request.php?id=2023 to register using your Sage email address.

For partners, send requests to:

- Europe: MMEmarketingcentralteam@sage.com
- North America: CloudbookSageERPX3@sage.com
- AAMEA: strategic.sales.za@sage.com

As your registration is approved, you will receive an email conformation from *app@cloudbook.net* including instructions to download the App and your login to access Sage ERP X3 content.

Sage registered users can access the public and private chapters of the Cloudbook (see above). They can share public content with prospects and customers by "gifting" the app (see below). Prospects and customers do not need to register with Sage and can re-gift the Cloudbook to anyone within the same company email domain.

Do I need the Cloudbook App to view the Sage ERP X3 Cloudbook content?

No. You can access the Cloudbook content from any browser. However, the user experience is better using the iPad App, and content sharing and analytics are currently only available when using the Cloudbook App.

Do I need an iPad to use the Cloudbook App?

Yes. An iOS device (iPad or iPhone) is required to use the Cloudbook App. You can access the browser version, as noted above, if you don't have access to the app.

Is the Sage ERP X3 Cloudbook available in my language?

The Sage ERP X3 Cloudbook is available in English, German, Spanish, Portuguese and French.

As a Sage partner, can I add my own chapter or create my own Cloudbook?

Yes. Cloudbook has created a program for partners to leverage the Sage ERP X3 Cloudbook content plus add their own chapter(s) to create a more customized book to distribute to their customers and prospects. Partners can also create their own standalone Cloudbook with special pricing. Email CloudbookSageERPX3@sage.com with the subject "Information about creating my own Cloudbook" as the subject and we will work with you to initiate the project.

How can I share content from the Sage ERP X3 Cloudbook?

Use the "Gift" link in the Cloudbook iPad App top menu bar to share content with anyone with an email address.

When gifting the Cloudbook, an email is sent to activate the account. Please ensure that gifting the Cloudbook complies with email regulations for your area

What do customers see when I share the Cloudbook with them?

When you Gift the Cloudbook to customers, they receive a confirmation email from app@cloudbook.net with links to download the Cloudbook App and a personal login to access the Sage ERP X3 Cloudbook content.

Once logged in, customers can browse any chapter of the Cloudbook, except the private chapters (see above "what content is available on the Sage ERP X3 Cloudbook"). Private folders are hidden from non-sage users and cannot be shared.

How can I track customers' interest?

Use the "Analytics" link in the Cloudbook iPad App top menu bar to access usage analytics by organization and by person you shared content with.

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Sage ERP X3 version 7 - English	Gift	Analytics
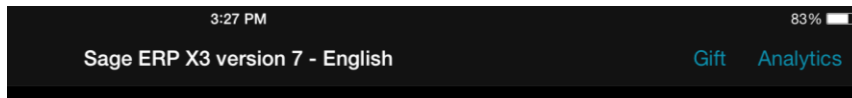
Can I download content from the Cloudbook app for other use?

No. The content can only be viewed within the Cloudbook App on iPad or iPhone, or in a browser.

Can I use the Cloudbook App offline?

You need an Internet access to stream videos from the Cloudbook. Other documents may be downloaded on your device and viewed off line.

Does Cloudbook replace the sales and marketing material available on Sage Sell or the Partner Portal?

No. In addition to Cloudbook, sales and partners may access and download all sales and marketing material on partner websites.

Why use the Cloudbook rather than Sage Sell or the Partner Portal for sales and marketing collateral?

- New content is automatically pushed to your Cloudbook without the need to login to a website and check for updates.
- You can quickly pull up content to support conversations with customers without the need to fire up your PC and browse your personal folders for the files and applications you need.
- You don't need to swap software applications to play a video, show a presentation or read PDF article.
- You can monitor consumption of the content that you shared with customers.

Why use Sage Sell or the Partner Portal rather than the Cloudbook for sales and marketing collateral?

- You can download content on your personal computer for personalization and to use off line
- The Sage ERP X3 Cloudbook does not include content on other Sage products.
- Product news, events calendar, registration forms, and partner marketing program information are not available on the Cloudbook. Only sales and marketing collateral is available on both the partner portal and the Sage ERP X3 Cloudbook.

How to adjust Cloudbook update settings:

To adjust Cloudbook settings go to the Settings app of your iPad, then scroll down until you see a Cloudbook tab.
In this tab you can allow, updates over cellular network (Updates can take a while over a cellular network).
You can also chose how frequently to check for updates (Always, 5min, 1h…)
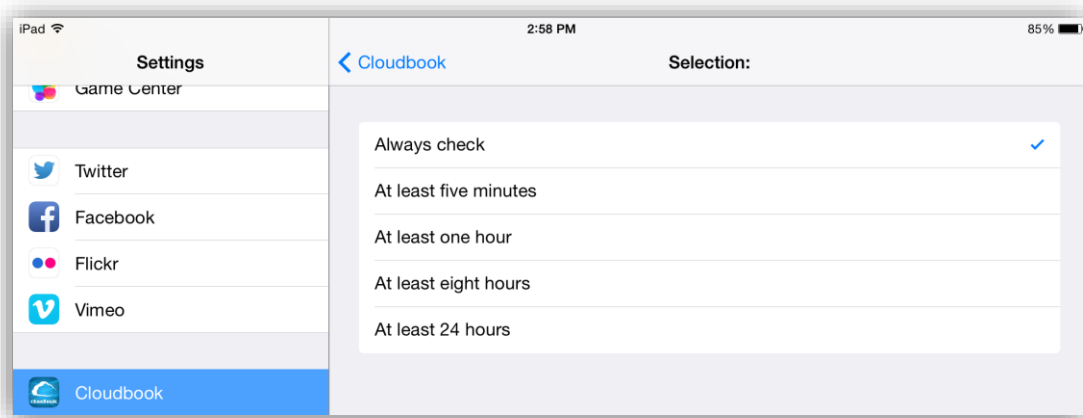
Is there a Cloudbook app HELP documentary? :

Yes. Inside the Cloudbook app, click on the info button at the bottom of the screen. Then click on the Application Help chapter to access to different type of help.