

# Partner Advantage Program



## Cross-Product Referral Program for Sage Business Partners

### Earn 10% of the Net Selling Price and 50% Tier Credit on Sage Referred Products

Regardless of the number of Sage product solutions you are authorized to represent, the opportunities to earn margin and tier credit are unlimited with the Cross-Product Referral Program. More importantly, this program allows you to focus on your authorized Sage products while building relationships with other Sage business partners who can ultimately help you earn more revenue. What's more, you can either refer leads to business partners who are outside of your geographic area of coverage or refer to local business partners—your choice—and still earn margin and/or tier credit when the sale closes.

Think how many opportunities the entire suite of Sage products can bring to your business. Start building alliances with other Sage business partners who represent products that you are not authorized to sell or who can pursue leads that are outside your area of focus! These revenue opportunities might otherwise be lost if the functionality of the solutions you represent doesn't meet your customers' needs or if the customer is looking for a local business partner. For more details, talk with your Sage sales representative about this program and start earning margin and/or tier credit on the entire Sage family of products.

### Your Revenue Opportunity

When you identify one of your clients or prospects with a need for a Sage product that you would like to refer to another Sage business partner, you can earn 10% of the net selling price and/or 50% tier credit for the net business partner cost on referral leads that close. It's our way of saying, "Thanks for keeping customers in the Sage family."

### Benefits of the Sage Cross-Product Referral Program

**The Cross-Product Referral Program offers you the following revenue opportunities and the ability to provide:**

- Additional Sage products, such as Sage HRMS, for your existing customers.
- A migration path for your existing customers who have outgrown their current system: For example: Sage 50—U.S. Edition (formerly Sage Peachtree) to Sage 100 ERP (formerly Sage ERP MAS 90); Sage BusinessWorks Accounting to Sage 300 ERP (formerly Sage ERP Accpac) or Sage 100 ERP; and Sage 100 ERP to Sage 500 ERP (formerly Sage ERP MAS 500) or Sage ERP X3.<sup>1</sup>
- Sage products that you do not currently offer.
- Sage products that you are authorized for, but are outside your area of coverage.
- Targeted industry solutions.

**Earn Referral Credits on referred leads that close:**

- Qualifying Sage products include:
  - **Sage Mid-Market and CRM Solutions:** Sage 100 ERP and Sage 500 ERP; Sage BusinessWorks, Sage BusinessVision Accounting, Sage PFW ERP, Sage CRM, Sage HRMS, Sage Fixed Assets, Sage 300 Construction and Real Estate (formerly Sage Timberline Office), Sage 300 ERP, Sage Pro ERP, and Sage 100 Contractor (formerly Sage Master Builder).
  - **Sage Small Business Solutions:** Sage 50—U.S. Edition, Sage 50 Quantum Accounting (formerly Sage Peachtree Quantum),<sup>2</sup> and Sage Timeslips.
- A 10% credit of the product net selling price is placed on the referring business partner's account.<sup>3</sup>

**Earn Tier Credits:**

- For referrals of Sage Mid-Market and CRM Solutions that close, Sage provides 50% tier credit on net business partner cost to referring business partner based on current tier level.<sup>4</sup>
  - Sage Small Business Product partners receive \$500 tier credit for referrals of Mid-Market and CRM Solutions that close.
- For referrals of Sage Small Business Products that close, a 50% tier credit on the net purchase value is issued to the referring business partner's account.<sup>5</sup>
- For referrals of Sage Peachtree Quantum that close, the referring business partner receives \$2,000 in tier credit.
- Sage also provides 100% Tier Credit on net product purchase value to the selling business partner.



## Easy Steps to get Started

When you identify a prospect<sup>6</sup> for a qualifying Sage product, choose one of the two following options to register the opportunity.

1. There are two options for registering a lead. Go to <http://MySageSell.com> and fill out the Lead Registration form (Partner Programs/Cross Product Referral) or call 866-675-LEAD (5323).
2. Call us at 866-675-LEAD (5323).

Once Sage qualifies and accepts the lead, we refer you and your prospect to the appropriate authorized business partner or you can provide your own alignment business partner.

## Receive Credits After Opportunities Close

- You must submit the Sage Lead Referral Credit Request Form by fax (949-753-1580) or email ([LeadReferral.NA@Sage.com](mailto:LeadReferral.NA@Sage.com)) within 90 days from the date when your client purchased the product. Sage also reviews our database monthly and does our best to process credits for any opportunities that were registered and closed under this program. However, to ensure proper credits, please submit the Credit Request Form.<sup>7</sup>
- To receive credit for the sale, the opportunity must be closed by the business partner to whom the lead was originally aligned to on the Lead Referral.<sup>8</sup> Any exceptions must receive prior approval from the Sage sales director.
- For tier credit, please provide verification that you have met the requirements of orchestrating and participating in an introductory kickoff meeting with the prospect and the selling authorized business partner.<sup>8</sup>
- Upon verification of the order, your account is credited within 30 days with 10% of the product SLP (net of Sage promotion), and/or tier credit is provided, if applicable.

**Note:** If you are a CPA and your referring prospect is your audit client, please note that we compensate you 10% credit in exchange for your commitment to render reasonable advisory support services to your client after the sale closes.

## Get Started Today

Get started now and collaborate with other Sage business partners to maximize your market opportunities, increase your revenue, and build a loyal customer base. Please contact your Sage sales representative for assistance if you are interested in building partnerships with other Sage business partners for referral purposes.

**Note:** Sage reserves the right to modify the terms of the Sage Cross-Product Referral Program without notice to Sage business partners in the interest of responding to market challenges and opportunities. Business partners will be notified in a timely manner of any changes to the terms and conditions of the program.

1 Sage ERP X3 referral leads please refer to the Sage ERP X3 Referral Program guidelines.

2 For Sage 50 Quantum Accounting, a \$750 credit will be placed on the referring partner's account.

3 Referring partner may request not to receive the 10% credit on his account and instead opt for tier credit only.

4 To qualify for the 50% tier credit, referring partner is required to orchestrate and participate in an introductory kickoff meeting with the prospect and the selling authorized business partner.

5 For Sage Small Business Solution referrals that close, a copy of the invoice must be provided along with the Lead Referral Credit Request form to receive the tier credit.

6 The client cannot be a prospect with whom another Sage business partner is already working or a lead that is already registered with Sage.

7 To verify the status of a credit, please email: [LeadReferral.NA@Sage.com](mailto:LeadReferral.NA@Sage.com).

8 Sage products must be purchased within 12 months of the referral date to qualify for the 10% credit or 50% tier credit.