

# Sage Partner Advantage Programs Guide



Introduction

Partner Programs

Tier Benefit Program

Certification and Authorization

sage

## ◆ Sage Partner Advantage Programs Guide

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## Introduction

For over 30 years, Sage has provided solutions that make it easier for our customers to manage their business processes. In many ways, our dedication to serving customers begins with our dedication to collaborating with partners. We understand how vitally important our partner network is. Forging successful partner relationships has helped us earn a reputation as the “partner friendly software company.” And, that’s by design.

When you partner with Sage, you represent a portfolio of business management solutions that helps 3.2 million North American customers meet the demands of their businesses every day. With products and services developed for customers in startup businesses all the way through established enterprises, customers have a variety of proven solutions in many industries to match their unique needs.

Sage partners and consultants increase their profitability by supporting competitive solutions that are also backed by superior support, partner programs, and marketing services. Whether you represent one product or several products in the Sage portfolio, Sage is committed to helping you create extraordinary experiences.

# Partner Programs

## Marketing

### Fast Track for Marketing

#### **Become a Marketing Genius with the Fast Track for Marketing program.**

Fast Track for Marketing is a proven 12-month program that provides one-on-one expert marketing coaching and over \$7,000 worth of benefits to partners who are committed to growing their businesses and acquiring new customers using proven marketing strategies.

#### **Who should join?**

Business partners who want to improve their marketing and increase year-over-year new license sales will benefit from participating in Fast Track for Marketing.

#### **What are the requirements for participating?**

- Authorization to sell specific products from the Sage solutions portfolio including Sage Peachtree and Sage ACT!
- Successfully complete required product certifications.
- Show commitment at the level of business partner owner to establish and implement a custom marketing plan designed to produce incremental new system sales for a specific product line.
- Remain in good standing with Sage, with an active business partner agreement in force during membership in the Fast Track for Growth program.
- Within four months after the Agreement Effective Date, attend the Sage Marketing Academy.
- Invest \$3,000 USD/CAD (\$1,000 up front and \$500 monthly payments thereafter for four months).

### Why participate? You get more than \$7,000 in benefits, including:

- One registration to the Sage Marketing Academy.
- Lead Generation Program (up to \$3,000 reimbursed 100% for qualifying lead generation expenses).
- 70% Co-op reimbursement for qualified lead generation expenses.
- One Sage Summit registration.
- One annual subscription to the Sage Marketing Platform (Zift Solutions).
- Duct Tape Marketing Ultimate Marketing System binder.
- Monthly coaching by a certified Duct Tape Marketing coach.
- Access to solution consultants to assist with pre-sales product questions.
- Participation in Fast Track for Marketing Webcasts.
- 18 months to earn credits, up to \$3,000 worth, for qualifying transactions to earn back your initial investment.

### Sign up:

Classes begin annually in October. We accept applications throughout the year.

Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab / **Partner Advantage** to learn more and apply. If you have any questions or need more information regarding Fast Track for Marketing, please email [partnerprograms@sage.com](mailto:partnerprograms@sage.com).

### Sage Partner Marketing Platform

The Sage Partner Marketing Platform (SPMP) enables partners to manage all of their online marketing activities. This “two-tier” marketing automation platform helps to quickly, easily, and cost-effectively set up, launch, and manage web-based marketing campaigns. The first “tier” enables each business partner to manage their own activities and generate leads for themselves. The second “tier” enables Sage to automatically provide updates to all partners on new campaigns, offers, and product information. It also tracks results in real-time to improve our overall marketing effectiveness. Each partner receives:

- New customer acquisition campaigns that are set up and ready to run in minutes.
- Customizable email, invitations, and microsites to make each campaign your own.
- Automatically updated content for campaigns and Sage product showcases.
- Sage product showcases with complete web pages and microsites that can be added to your website with a simple line of HTML code.
- News Widget, which provides automatically updated Sage published articles and allows you to add articles from websites that make sense for your customers and prospects.
- Sage Webcast Center event calendar, listing the current schedule of events for customers and prospects to learn about Sage products.

#### **Who should participate?**

All Sage Business Partners that want leading-edge tools to generate new customers leads.

## Why participate?

For less than the price of many demand generation campaigns in the past, you receive 12-months of access to an entire marketing platform:

- Pre-set and customizable campaigns that can be launched quickly and easily.
- Automatically updated content to keep your website relevant and current.
- Auto-updated content to increase prospect interest, better website traffic, and SEO.

## How to get started:

- Sign up for an account at <http://sage.zift123.com/>.
- View a “how-to” recording for using the platform.
- Contact [partnermarketing@sage.com](mailto:partnermarketing@sage.com) if you have questions.

### Sage Partner Marketplace (Partner Print On-Demand)

The Sage Partner Marketplace is an easy-to-use, one-stop website for high-quality printed product collateral. The Marketplace offers Sage-branded and partner co-branded product brochures, spec sheets, success stories, and white papers for all Sage Business Solution products. The co-brand option is easy to use and allows a partner to customize collateral with their company logo and contact information. In addition, all orders on the Marketplace are co-op eligible at the Sage Preferred Vendor rate of 60%.

#### Who should use the Marketplace?

Any authorized Sage business partner who wants quick access to high quality printed product collateral.

#### Why participate?

- Easy access to the latest Sage product collateral.
- High quality, fast and reliable printing at competitive prices.
- Co-brand and customize product collateral with your company logo and contact information.

#### How to get started:

- Visit: <https://marketplace.mimeo.com/SagePartnerMarketplace>.
- Enter in the following required passcode: *sagepartner*.
- For questions or additional assistance, please contact [partnermarketing@sage.com](mailto:partnermarketing@sage.com).



### Partner Marketing Resource Center (PMRC)

The Partner Marketing Resource Center (PMRC) is the hub for all your channel marketing needs. On this online portal, Sage Business Partners access tools, services, assets, information and training to assist with marketing Sage solutions products. Partners can view and manage their available co-op marketing funds, download product and partners logos, and co-branded marketing materials, connect with Preferred Marketing Vendors, and access resources for marketing and sales advice.

#### Who should use the Partner Marketing Resource Center?

Any Sage Business Partner who wants quick access to valuable Sage sales and marketing resources to help them grow their business.

#### Why participate?

- View your co-op marketing fund balance.
- Download authorized Sage marketing assets such as partner and product logos, box shots, and co-brandable email templates.
- Get the most current Sage Partner Branding Guidelines.
- Access the resources to start planning marketing activities.
- Take advantage of tips for online marketing, search engine optimization (SEO), blogs, and email campaigns.

#### How to get started:

- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com).
- Enter your user name and password.
- If you do not know your logon, please contact the PMRC and Co-op Helpdesk at **877-316-8846** or email: [sagecoop@pb.com](mailto:sagecoop@pb.com).

### Sage Co-op Marketing Program

Through the benefit of the Sage Tier program, Sage subsidizes our marketing budget with a % of our total sales. Sales Business Partners earn funds based on new license sales and upgrades. These funds can be used to reimburse eligible marketing expenses.

#### Who should participate?

Any Sage Business Partner who wants to save money on marketing activities to generate leads and grow their business.

#### Why participate?

- Receive up to 70% reimbursement from Sage for eligible marketing activities.
- Get reimbursed for your marketing investment from your available co-op funds. (Reimbursement rates vary between the Sage Mid-market Partner Co-op program and the Sage Certified Consultant Co-op program. Review the Co-op Guidelines for your program for more information.)
- Receive an electronic monthly statement of your available funds and a reminder to use funds that may expire.

#### How to get started:

- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com).
- Review the Co-op Guidelines specific to your program to learn which product groups participate in each program, how you earn funds, and what marketing activities are eligible for reimbursement.
- Choose the **Manage Co-op** tab and select **Guidelines & Rules** then **Co-op Program Guidelines** from the drop down menu.
- For more details email: [partnermarketing@sage.com](mailto:partnermarketing@sage.com).

### Sage Preferred Vendors

Sage has identified a select group of marketing vendors that can help increase sales and revenue for our business partners. Sage Preferred Vendors (PMV) are selected based on their quality, cost and ROI, reliability and ease-of-use by Sage Business Partners. Sage monitors PMV's by surveying our channel to gather feedback on their knowledge, service and performance.

#### Who should leverage the services of preferred vendors?

Any Sage Business Partner who would like to work with vendors who are familiar with Sage products, market trends, and competitive differentiators.

#### Why use preferred vendors?

- Provided easy-to-use marketing services. Sage has pre-negotiated prices, fast turn-around time, and customized marketing campaigns to meet your needs.
- PMV services are eligible for increased co-op marketing reimbursement (60% for the Sage Mid-marketing Partner Co-op program and 75% for the Sage Certified Consultant Co-op program).

#### How to get started:

- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com).
- Choose the **Partner Programs** tab and select **Preferred Vendors** from the drop down menu.
- Please note that some vendors do not participate in both the mid-market and small business Certified Consultant programs.
- For more details email: [partnermarketing@sage.com](mailto:partnermarketing@sage.com).

### Co-op Debit

The Co-op Debit program enables partners to lower their out-of-pocket costs and eliminate co-op paperwork when they use services provided by Sage preferred vendors.

#### Who should participate?

Any authorized mid-market business partner working with a Sage Preferred Vendor who is interested in reducing out-of-pocket expenses for marketing activities. Must be in good standing with Sage.

#### Why participate?

- You can eliminate co-op paperwork and make it easier to use your preferred marketing services.
- Improve your cash flow—a Sage-authorized preferred vendor will invoice Sage directly for 60% of the total cost of the service, which is deducted from your co-op account.
- You only pay the vendor for the portion of the expense not reimbursed or “debited” directly by Sage!

#### How to get started:

- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) to learn more about the Co-op Debit program.
- Choose the **Manage Co-op** tab, select **Guidelines & Rules**, then **Co-op Debit Program Overview**.
- To learn more about our Preferred Vendor services, choose the **Partner Programs** tab and select **Preferred Vendors** from the drop-down menu.
- For more details email: [partnermarketing@sage.com](mailto:partnermarketing@sage.com).

### Webcast Lead Builder

Partners can utilize the Webcast Lead Builder program to generate leads by leveraging Sage-hosted webcasts.

#### Who should participate?

Any authorized business partner looking to increase their lead pipeline.

#### Why participate?

- It's a free program for you to join.
- You can leverage the existing prospect and customer webcasts that Sage hosts on the Sage Webcast Center.
- Over 60 live and recorded product marketing webcasts are hosted each month by Sage.
- Webcasts are free to register and attend.

#### How to get started:

Sign up or learn more by visiting [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab and choose **Webcast Lead Builder**.

### Sage Marketing Academy

The Sage Marketing Academy is a four-day intensive marketing course designed to jump start your marketing efforts. The academy starts before you even arrive at class with key customer interviews that are required for participation. Through the academy, you will refine your core messaging and differentiation, and then use this core messaging to develop a comprehensive marketing calendar.

#### Who should participate?

Any business partner who is serious about creating a sustainable marketing plan would benefit from participating in Sage Marketing Academy. Partners will leave with a 12-month marketing calendar.

#### How to get started:

- The Sage Marketing Academy is offered quarterly.
- Visit [www.sageu.com](http://www.sageu.com) for more information and to register.

# Extraordinary Customer Experience

## Sage Customer Loyalty Program

The Sage Customer Loyalty Program provides you access to a powerful surveying tool that is deployed to our mutual customers to establish Net Promoter Scores (NPS) for both your company and the Sage product(s) you carry. This vital information helps you develop strategies to improve client retention and customer loyalty. Offered annually.

### Who should join?

We strongly encourage any business partners who are serious about providing an Extraordinary Customer Experience to their customers to participate. Partners curious about what their NPS score is and how their customers really feel about them and the Sage products they represent should not miss this opportunity.

### Why participate?

- Find out how customers really feel about your organization.
- There is no cost to participate—Sage is picking up the tab.
- Find out your Net Promoter Score for your organization and the Sage products you carry.
- Sage's third party vendor administers the survey on your behalf.
- Get access to a dashboard to view results from each of your individual clients.
- Customize your survey by selecting from a bank of additional survey questions and add them to the standard questions.
- See how you stack up against your peers—compare your ranking results against overall partner benchmark for the product lines that you carry.
- Receive a Customer Loyalty Program Workbook that will help you understand the concept of the Net Promoter survey, the scores, and how to make the most of it for your business.
- Compare scores year-over-year.
- Compete to win one of four President's Circle Customer Excellence Award spots for the highest promoter scores in an eligible product line category.

### What are the requirements for participating?

- Be authorized to sell specific product lines selected from the Sage solutions portfolio as well as Sage Peachtree and Sage ACT!
- Agree to name a contact person from your organization who will work with Sage during the Customer Loyalty Program term.
- Agree to allow a third-party vendor to deploy a customer survey using your business partner or certified consultant company name.
- Agree to allow Sage to submit/upload your entire Sage customer base (customers showing activity in the past two years) to an independent third-party survey vendor no later than the specified deadline (you can choose to keep your individual customer results confidential however certain benefits will not apply.)
- Receive a minimum survey response rate of 25% of total customers submitted to be eligible for a President's Circle Customer Excellence award.
- Remain in good standing with Sage with an active business partner/certified consultant agreement in force during membership in the Customer Loyalty Program.

### How to get started:

This program is offered annually every October. Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** for more information and to sign up.



### Fast Track for Consulting

#### **Get Paid for Your Knowledge with the Fast Track for Consulting program.**

Fast Track for Consulting is a comprehensive, 12-month training and mentoring program delivered by experts in the industry. It is designed for partner organizations that are focused on increasing their consulting knowledge, and creating mutually beneficial long-term relationships with their customers. Plus, participants receive over \$4,000 worth of benefits which support their success in the program.

#### **What are the requirements for participating?**

- Authorization to sell specific products from the Sage solutions portfolio including Sage Peachtree and Sage ACT!
- Successfully complete required product certifications.
- Show commitment at the level of business partner owner to establish and implement a custom marketing plan designed to produce incremental new system sales for a specific product line.
- Remain in good standing with Sage, with an active business partner agreement in force during membership in the Fast Track for Consulting program.
- Within four months after the Agreement Effective Date, attend the Sage Consulting Academy.
- Invest \$3,000 USD/CAD (\$1,000 up front and \$500 monthly payments thereafter for four months).

### Why participate? You get more than \$4,000 in benefits, including:

- One registration to the Sage Consulting Academy.
- One Sage Summit registration.
- 70% Co-op reimbursement on qualifying lead generation expenses.
- Bi-monthly coaching calls facilitated by a consulting expert.
- Monthly peer group calls focusing on Sage Consulting Academy concepts.
- Shared social media site for idea sharing with the group.
- Participation in Fast Track for Consulting Webcasts.
- 18 months to earn credits, up to \$3,000 USD worth, for qualifying transactions to earn back your initial investment.

### Sign up:

Classes begin annually in October. We accept applications throughout the year.

Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab / **Partner Advantage** to learn more and apply. If you have any questions or need more information regarding Fast Track for Consulting, please email [partnerprograms@sage.com](mailto:partnerprograms@sage.com).

### Customer Experience Workshop

The discussion in this free one-day workshop focus on how Sage partners can build extraordinary customer experiences with their customers. Improving the customer experience requires putting ourselves squarely in the position of the customer. We will explore what is entailed in providing an extraordinary customer experience and develop a framework that can be implemented within the partners' organization.

#### **Who should participate?**

We strongly encourage any business partners who are serious about providing an Extraordinary Customer Experience to their customers to participate.

#### **How to get started:**

Check [www.sageu.com](http://www.sageu.com) for the latest schedule.

### Consulting Skills Workshop

The discussion will focus on how Sage consultants can continuously improve their consulting skills. We will explore consulting skills affect the customer relationship. Improving consulting skills is difficult because it requires introspection regarding long-held beliefs about customer relationships and partners. Identifying and changing areas where partners can improve are worth examining to develop their ability to create value for their customers. This is a free one-day workshop.

#### **Who should participate?**

Sage consultants seeking new ideas for improving service and creating value for customers.

#### **How to get started:**

Check [www.sageu.com](http://www.sageu.com) for the latest schedule.

## Sales

### *HireAssist*

The *HireAssist* program is designed for business partners who have a desire to expand their organization by hiring full-time employees who are dedicated to Sage product lines. In this all encompassing program, Sage will co-fund and assist in the recruiting, hiring, training, and on-going coaching effort necessary to have an effective, productive, full-time resource. There are two programs under *HireAssist*—*HireAssist* Sales, and *HireAssist* Consulting.

#### **Who should join?**

- *HireAssist* Sales—Partners who would like to focus on new system sales but need some assistance hiring a full-time field salesperson dedicated to a specific Sage product line.
- *HireAssist* Consulting—Partners who are experiencing implementation backlog or just want to provide exceptional professional client services.

#### **What are the requirements for participating?**

- Authorization to sell specific product lines selected from the Sage solutions portfolio as well as Sage ACT!
- Commitment to hire a full-time employee.
- Commitment to execute on marketing plan.
- Successful completion of required product certifications.
- Owners commitment to execute on the agreed upon plan.
- Has signed and delivered the Channel Partner Agreement.
- Good standing with Sage.

### Over \$5,000 USD in benefits, including:

- Funding to offset the initial costs of hiring.
- Funding for candidate profiling through Opus Productivity Solutions.
- Free registration for training.
- Access to Peer Advisor.
- Exclusive educational webcasts.
- And much more!

*\*Requirements and benefits may vary depending on the program.*

### How to get started:

Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** to learn more and apply.

### Fast Track for Sales

#### **Master the Will, Drill and Skill of Selling with the Fast Track for Sales program.**

Fast Track for Sales is a comprehensive, 12-month training and mentoring program delivered by LDK Consulting, Ltd., a firm specializing in the development of sales and sales management productivity. It is designed for partner organizations that are focused on adding new customers, increasing revenue from current customers, and creating mutually beneficial long-term relationships with customers. Participants receive over \$4,000 worth of benefits which support their success in the program.

#### **What are the requirements for participating?**

- Authorization to sell specific products from the Sage solutions portfolio including Sage Peachtree and Sage ACT!
- Successfully complete required product certifications.
- Show commitment at the level of business partner owner to establish and implement a custom marketing plan designed to produce incremental new system sales for a specific product line.
- Remain in good standing with Sage, with an active business partner agreement in force during membership in the Fast Track for Sales program.
- Within four months after the Agreement Effective Date, attend the Sage Sales Academy.
- Invest \$3,000 USD/CAD (\$1,000 up front and \$500 monthly payments thereafter for four months).

### Why participate? You get more than \$4,000 in benefits, including:

- One registration to the Sage Sales Academy.
- One Sage Summit registration.
- One annual subscription to First Research ([www.firstresearch.com](http://www.firstresearch.com)).
- 70% Co-op reimbursement on qualifying lead generation expenses.
- Peer group calls facilitated by a sales expert focusing on Sage Sales Academy concepts.
- Access to solution consultants to assist with pre-sales product questions.
- Participation in Fast Track for Sales Webcasts.
- 18 months to earn credits, up to \$3,000 USD worth, for qualifying transactions to earn back your initial investment.

### Sign up:

Classes begin annually in October. We accept applications throughout the year.

Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab / **Partner**

**Advantage** to learn more and apply. If you have any questions or need more information regarding Fast Track for Sales, please email [partnerprograms@sage.com](mailto:partnerprograms@sage.com).



### Business Partner Alliance Program

The Business Partner Alliance program provides you with support and assistance in developing local public accounting alliance relationships. The Business Partner Alliance program provides a formal method for both receiving and registering alliances from, and with, Sage. In addition, it is designed to provide you with tips and tools you can use internally and share with your alliance members to nurture the Sage Accountants Network (SAN) relationship.

#### Who should participate?

- Any Authorized Business Partner who resells and supports one or more Sage solutions

#### Why participate?

As a member of the Business Partner Alliance program, you receive:

- Alliance referrals, when available, to new SAN members as they join.
- Formal registration in the Sage Business Partner Alliance database for the alliances you now have.
- Participation in Sage events that include SAN members.
- Communications sent to SAN members.
- Periodic partner training on developing CPA relationships from Sage and other industry experts.
- Tips, tools, and techniques to support you in your alliance efforts.
- Business Partner Alliance quarterly newsletter.
- Easy access to customizable marketing materials designed to promote your commitment to your SAN alignments.

#### How to get started:

- Complete the Business Partner Alliance Program application by visiting [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** and fax it to **770-564-6029**.

### Sage Partner Advantage Competitive Webcast Series

The goal of the Sage Partner Advantage Competitive Webcast Series is to ensure that Sage business partners are adequately prepared to compete effectively in the marketplace with the tools and competitive intelligence they need. Elements of the webcasts include:

- Sage rapid response team.
- Bi-monthly webcasts.
- Competitive sales tools and whitepapers.
  - Competitive Advantage section on the Sage Partner Portal, including recorded webcasts, competitive sales tools and information.

#### Who should attend?

All Sage business partners are encouraged to attend. These webcasts are focused on the top 3-4 competitors in each product group. Invitations are sent bi-monthly and included in the monthly Sage Channel News.

#### Why participate?

- Get SWOT analysis on your competitors.
- Learn competitive selling strategies that work.
- Gain access to supporting sales tools and collateral.
- Know your competitors better than they know you!

#### How to get started:

- Visit [www.sagepartnerportal.com](http://www.sagepartnerportal.com)
- Go to the **Build Knowledge** tab/**Competitive Advantage**. View the recorded webcasts, PowerPoint decks, and more.

### Selling in a Competitive Environment Workshop

Selling in a Competitive Environment is a free one-day hands-on workshop designed to arm you with the fundamental skills needed to refine your selling techniques to compete and win. Based on the core fundamentals of the Sage Sales Academy sales process, this fast-paced one-day program that will provide the key skills required to compete effectively in today's market.

#### Who should participate?

All Sage Business Partners.

#### Why participate?

Attendees will learn:

- The seven essential selling skills you need to win in the marketplace.
- How to develop your personal outreach plan with the six-step plan and create an ocean of opportunities.
- How to create and execute your Strategic Competitive Advantage.
- How to price your solutions to win more, without discounting.

#### How to get started:

- Check [www.sageu.com](http://www.sageu.com) for the latest schedule.

## Cross Product Referral Program

The Cross Product Referral program enables you to earn margin and tier credit on products for which you are not authorized to represent. 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. You can either refer leads to business partners who are outside of your geographic area of coverage, or refer to local business partners. Either way, you will earn 10% of the net selling price and/or 50% tier credit when the sale closes.

### Who should participate?

All authorized business partners.

Qualifying Sage products include:

| Mid-Market              |                            |
|-------------------------|----------------------------|
| Sage Abra               | Sage Fundraising 50        |
| Sage BusinessVision     | Sage Master Builder        |
| Sage BusinessWorks      | Sage PFW ERP               |
| Sage CRM                | Sage Pro ERP               |
| Sage ERP Accpac         | Sage SalesLogix            |
| Sage ERP MAS 90 and 200 | Sage Timberline Enterprise |
| Sage ERP MAS 500        | Sage Timberline Office     |
| Sage FAS Fixed Assets   | Sage TimeSheet             |
| Sage Fund Accounting    |                            |

| Small Business |                          |
|----------------|--------------------------|
| Sage ACT!      | Sage Peachtree – Quantum |
| Sage Peachtree | Sage Timeslips           |

### Why participate?

- 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.
- For referrals of Mid-Market solution products that close, Sage will give 50% tier credit on net business partner cost to referring business partner based on their current tier level.
- Small Business solution partners will receive \$500 tier credit for referrals of Mid-Market solution products that close.
- For referrals of Small Business solution products that close, a 50% tier credit on the net purchase value will be issued to the referring business partner's account.
- For referrals of Sage Peachtree – Quantum that close, the referring business partner will receive \$2,000 in tier credit and a \$750 credit on their account.
- Sage will also give 100% tier credit on net product purchase value to the selling business partner.

### How to get started:

- Register your leads online at [www.sagesoftware.com/partnerreferral](http://www.sagesoftware.com/partnerreferral).
- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** to learn more.

## Leadership

### Business Strategy Workshop

This free one-day workshop will focus on how Sage partners can build true strategy in their businesses. Partners will be challenged to suspend their thoughts about the immediate nature of their business and instead focus on where they want to take their business for the future. This session will also explore how to build strategy on top of your purpose and aspiration by looking at several different strategic planning tools. You will then take these tools and begin to develop your plan.

#### **Who should participate?**

Business executives, principals, and other leaders responsible for shaping the strategy of their business.

#### **Why participate?**

- Understand a context for developing strategy in a small and medium business.
- Examine what strategy is, or more importantly, what is not a strategy in a small business.
- Learn about mental model for exploring this strategy.
- Workshop four different levels of strategic planning tools for use in your business.

#### **How to get started:**

Check [www.sageu.com](http://www.sageu.com) for the latest schedule.

### Firm of the Future Symposium

This symposium will be dedicated to the possibility that a professional organization can be run more effectively when it becomes a knowledge firm rather than a service firm. Creating such an organization is hard work and not for everyone as it requires partners to think differently than they have in the past about what it is that they do.

#### **Who should participate?**

Business executives, principals, and other leaders responsible for shaping the overall strategy of their business. Must be in good standing with Sage.

#### **Why participate?**

Participants will learn how to shift their business strategy:

- From a focus on revenue to a focus on profit.
- From a focus on capacity to a focus on capital management.
- From a focus on efficiency to a focus on effectiveness.
- From a focus on cost-plus pricing to a focus on pricing on purpose.

#### **How to get started:**

Check [www.sageu.com](http://www.sageu.com) for the latest schedule.

### Leadership Symposium

This symposium is dedicated to cultivating self-differentiated leaders among longstanding Sage partners, which will ultimately expand business for both Sage and partners. Cultivating self-differentiated leaders is hard work as it requires partners and Sage to think differently than we have in the past about what the nature of leadership really is. It is not simply managing resources or paying attention to the numbers. Although those things are important, they do not get to the heart of leadership which is personal in nature.

#### **Who should participate?**

Business executives and principals in good standing with Sage.

#### **Why participate?**

The objectives of the symposium are to:

- Assist you in developing a deeper understanding of leadership.
- Identify and begin to overcome some of the personal barriers that have held you and your company back.
- Develop a personal improvement plan for when you return.
- Understand that Sage truly desires to help you improve.

#### **How to get started:**

Check [www.sageu.com](http://www.sageu.com) for the latest schedule.



## Earn Rewards

### Sage Select

Sage Select is a rewards program designed to recognize and provide special benefits to business partners who focus only on the Sage portfolio of products. This annual program starts on October 1 each year and provides all the benefits listed below for the full year, except for the 2% additional tier margin benefit. The additional 2% tier margin benefit needs to be earned quarterly, based on maintaining a minimum product tier level of Gold and above and is tied to the current tier calculation periods.

#### Who should participate?

- Any authorized business partner who wants to earn additional margin and co-op funds.
- Must be in good standing with Sage and have signed and delivered the Sage Channel Partner Agreement.
- Cannot sell a competitive product in any Sage product category or market segment.
- Cannot market any competitive product through the Web or any kind of marketing materials.
- Cannot own a controlling interest in any other reseller that sells a competitive product.
- Must be at least Silver tier level within one Sage product line.
- Must have been an authorized business partner for at least a minimum of one year before being accepted into this program.

**Why participate?**

| Sage Select Benefits   | Silver Tier | Gold Tier and Above |
|--|-------------|---------------------|
| Higher Product Margins on New Sales<br><b>Note:</b> New customer sales are companies that purchase new products from our family of products for the very first time. Includes product sold to new customers within the first 120 days of original purchase date and new cross sell products sold to existing customers. Excludes Sage Fixed Assets which is considered an add-on module. |             | 2%*                 |
| Lead grid priority (if qualified)  | ●           | ●                   |
| Priority access to migration leads from small business products  |             | ●                   |
| Priority alignment to referral opportunities (where referral partner is not identified)  |             | ●                   |
| Priority access to non-aligned (orphan) customers  |             | ●                   |
| Higher Co-op Margins   | 2%          | 2%                  |
| Up to two free registrations to: <ul style="list-style-type: none"> <li>• Sage Consulting Academy</li> <li>• Sage Sales Academy</li> <li>• Sage Marketing Academy</li> <li>• Firm of the Future</li> <li>• Leadership Symposium</li> </ul> <b>Note:</b> Benefits must be utilized within the program year.   |             | ●                   |
| Priority selection for partner programs  | ●           | ●                   |
| Sage Select Logo Usage   | ●           | ●                   |
| Certificate of Distinction   | ●           | ●                   |

*\*For this benefit, you must earn a minimum product tier of Gold level or above. This benefit is tied to the tier calculation periods. You will have the opportunity each tier calculation period to earn this benefit.*

**How to get started:**

Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** to learn more and apply.

## In House Use Program

The In-House Use Program enables Sage business partners to receive any Sage product of their choice free of charge for in-house use, and pay a minimal annual maintenance fee as required.

### Who should participate?

- Any authorized business partner who wants to save money on software to run their business.
- You must be in good standing with Sage with an executed Sage Channel Partner Agreement on file.

### Why participate

- You can receive one copy of an in-house use product for each product family for free and pay a minimal annual maintenance fee as required.

### How to get started:

- Visit [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the **Partner Programs** tab/**Partner Advantage** to learn more and apply.
- For questions regarding the In-House Use program, please contact your sales representative or email: [partnerprograms@sage.com](mailto:partnerprograms@sage.com).

### Partner Advantage Award Series

The Partner Advantage Award Series is a prestigious awards program that recognizes top partner performance. Partners are rewarded for their diligence in representing Sage products and consistently going above and beyond to achieve excellence within the channel and their community throughout the year. Awards include:

#### **Sage North America Partner of the Year and Top Five Award**

The elite group of partners who achieve the highest total product revenue across all of Sage North America will be honored with the Top Five award, with the top partner of the group being recognized as the Sage North America Partner of the Year.

#### **Sage Eagle Award**

Prestigious award in recognition of a partner who delivers the highest level of Extraordinary Customer Experience.

#### **Chairman's Club**

Chairman's Club is a level of distinction for exceptional Sage business partners. The objective of this membership is to reward and provide special recognition to our high performing business partners.

#### **President's Circle**

The President's Circle rewards partners who achieve the top spots of specified award categories.

#### **Top Performers by Product Line**

This award recognizes top partners for each specific product line.

### **Million Dollar Club**

This award will be presented in recognition of the elite group of business partners who attain or exceed \$1 million in total Sage revenue.

### **Sage Customer Excellence Award**

Customer Loyalty Program participants with the highest net promoter scores will earn this recognition.

### **Sage Spirit Award**

This award recognizes partners that embody all five of the Sage principles: *Agility*, *Innovation*, *Simplicity*, *Trust*, and *Integrity*. They are identified as role models in the partner channel—and they value their relationship with Sage and embrace the Sage culture to create a mutually beneficial partnership.

### **Sage Community Service Award**

This award recognizes partners who raise the bar in terms of corporate responsibility and recognize the need to give back to the community through volunteerism and charity work. They are proud to support their community through corporate citizenship and philanthropy.

### **How to get started:**

For more information, please visit the Sage Partner Portal, [www.sagepartnerportal.com](http://www.sagepartnerportal.com) under the **Earn Rewards** tab. For questions, please email: [partnerprograms@sage.com](mailto:partnerprograms@sage.com).

## Tier Benefit Program

The **Business Partner Tier Benefit Program** outlines the qualifications and details for Sage authorized business partners to earn tier margins.

### Tier Qualifications Criteria

- Two qualifying thresholds, New License and Total Product, will determine tier level based upon a business partner firm's net revenue to Sage.
- Business partners must achieve both New License revenue and Total Product revenue thresholds to attain the tier level.
- To attain the designated tier level, the minimum threshold for both New License and Total Product must be met; otherwise, the tier associated with the lower of the two thresholds achieved will become the prevailing tier.
- The associated margin at each tier level for New License (NL), Installed Base (IB), and Maintenance and Support (M&S) is earned based upon the attainment of each of the two qualifying thresholds (New License and Total Product).

**Note:** New License, Installed Base, and M&S margin for Value 1, Value 2, and Value 3 Sage ERP 4, Sage ERP 5 are based upon the tier earned from achieving the Total Product thresholds only.

| Tier     | Threshold   |               | Margin |                      |     |      |
|----------|-------------|---------------|--------|----------------------|-----|------|
|          | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond  |             |               |        |                      |     |      |
| Platinum |             |               |        |                      |     |      |
| Gold     |             |               |        |                      |     |      |
| Silver   |             |               |        |                      |     |      |
| Bronze   |             |               |        |                      |     |      |

### **New License revenue includes:**

- Product revenue associated with:
  - Customers who are new to Sage
  - Existing Sage customers who are new to other Sage product lines
- Product sold to new customers within the first 120 days of original purchase date:
  - Additional modules
  - User licenses
  - Platform upgrades

### **Total Product revenue includes:**

- New license
- Installed base (add-on modules, user licenses and upgrades)
- Customer training revenue (classroom training, Web-based instructor led training, Anytime Learning, and ATC curriculum)\*

*\*Training purchased by the partner or customer through Sage, will be applied to the reseller of record and count toward Total Product revenue.*

**Note:** M&S, reinstatements, reseller fees, software for business partner's internal use, forms, professional services, and authorized training center (ATC) fees (signup fees and renewals) do not qualify for New License or Total Product revenue.

### **Product Line Categories**

- Tier achievement for all products listed in each product line category will be combined toward attainment of the qualifying thresholds.
- The following category product line revenues will be combined toward tier attainment:
  - Sage ERP 1, Sage ERP 2, and Sage ERP 3 product line revenues will be combined for Sage ERP 1 and/or Sage ERP 2 tier attainment.
  - Sage ERP 2 and Sage ERP 3 product line revenues will be combined to meet Sage ERP X3 tier attainment.
  - Value 1, Value 2, Sage ERP 4, Sage ERP 5 product line revenues will be combined.

| Category   | Business Unit                          | Product Line  | Category Combination for Threshold Attainment                   |
|------------|--|---|---|
| Sage ERP 1 | Sage ERP                               | <ul style="list-style-type: none"> <li>Sage ERP Accpac</li> <li>Sage ERP Accpac Online</li> <li>Sage ERP MAS 90 and 200</li> <li>Sage 100 ERP Online</li> </ul>   | <b>Sage ERP 1</b> = Sage ERP 1 + Sage ERP 2 + Sage ERP 3        |
| Sage ERP 2 | Sage ERP                               | <ul style="list-style-type: none"> <li>Sage ERP MAS 500</li> </ul>  | <b>Sage ERP 2</b> = Sage ERP 1 + Sage ERP 2 + Sage ERP 3        |
| Sage ERP 3 | Sage ERP                               | <ul style="list-style-type: none"> <li>Sage ERP X3</li> </ul>   | <b>Sage ERP 3</b> = Sage ERP 2 + Sage ERP 3                     |
| Sage ERP 4 | Sage ERP                               | <ul style="list-style-type: none"> <li>Sage Pro ERP</li> </ul>  | <b>Sage ERP 4</b> = Sage ERP 4 + Sage ERP 5 + Value 1 + Value 2 |
| Sage ERP 5 | Sage ERP                               | <ul style="list-style-type: none"> <li>Sage PFW ERP and Sage Active Planner</li> </ul>  | <b>Sage ERP 5</b> = Sage ERP 4 + Sage ERP 5 + Value 1 + Value 2 |
| CRE        | Construction and Real Estate Solutions | <ul style="list-style-type: none"> <li>Sage Master Builder</li> <li>Sage Timberline Office</li> <li>Sage Timberline Enterprise</li> </ul>                         | <b>CRE</b>  |
| CRM        | Customer Relationship Management       | <ul style="list-style-type: none"> <li>Sage CRM</li> <li>SageCRM.com</li> <li>Sage SalesLogix</li> </ul>  | <b>CRM</b>  |
| ES         | Employer Solutions                     | <ul style="list-style-type: none"> <li>Sage HRMS</li> </ul>   | <b>ES</b>   |
| FAS        | FAS Solutions                          | <ul style="list-style-type: none"> <li>Sage FAS</li> </ul>  | <b>FAS</b>  |
| NPS 1      | Nonprofit Solutions                    | <ul style="list-style-type: none"> <li>Sage Fund Accounting</li> <li>Sage Fund Accounting EWS + Sage Fund Accounting HR</li> <li>Sage Grant Management</li> </ul> | <b>NPS 1</b>  |
| NPS 2      | Nonprofit Solutions                    | <ul style="list-style-type: none"> <li>Sage Fundraising 50</li> <li>Sage Fundraising Online</li> </ul>  | <b>NPS 2</b>  |
| Value 1    | Value Solutions                        | <ul style="list-style-type: none"> <li>Sage BusinessWorks</li> </ul>  | <b>Value 1</b> = Value 1 + Value 2 + Sage ERP 4 + Sage ERP 5    |
| Value 2    | Value Solutions                        | <ul style="list-style-type: none"> <li>Sage TimeSheet</li> </ul>  | <b>Value 2</b> = Value 1 + Value 2 + Sage ERP 4 + Sage ERP 5    |
| Value 3    | Value Solutions                        | <ul style="list-style-type: none"> <li>Sage BusinessVision</li> </ul>   | <b>Value 3</b>  |



## Tier Calculation Rules

### Tier Calculation Measurement Periods:

- There are four tier calculations throughout the year.
- The range of data used for the tier calculations will be based upon a rolling 12 months of total qualifying sales: New License revenue and Total Product revenue.
- The total qualifying sales will be measured against the respective tier thresholds.

### Types of Calculations:

- Move up or down: tier levels for a business partner can improve or decrease.
- Move up only: tier levels can only improve for a business partner. If the new tier level is below the existing tier level, the tier level will not be changed. Effective April 1, 2012, Move up only tier calculations will no longer be valid.

### Calculation Dates:

- The tier level achieved by the Evaluation Date will become the effective tier level until the following Evaluation Date when the tier level will be re-calculated.

| Calculation Cycle | Evaluation Date | Tier Level Movement |
|-------------------|-----------------|---------------------|
| Calculation 1     | December 31     | Move up or down     |
| Calculation 2     | March 31        | Move up or down     |
| Calculation 3     | June 30         | Move up or down     |
| Calculation 4     | September 30    | Move up or down     |

### New Business Partner Tier Movement:

New business partners are those who have represented products within a business unit for less than 12 months.

- Business partners who are new to a business unit will not move down from their starting tier level for the first 12 months.
- After this initial 12-month period, the standard tier movement calculations referenced above will apply.

## Tier Schedule

\*For Bronze tier, the minimum Bronze Total Product threshold must be attained to start earning the minimum Bronze M&S margin. The New License and Installed Base margins start at the first dollar.

| Sage ERP 1-3 | Business Unit | Sage ERP Product Line   |        |                      | Category Combination for Threshold Attainment            |                 |                              |
|--------------|---------------|---|--------|----------------------|--|-----------------|------------------------------|
| Sage ERP 1   | Sage ERP      | <ul style="list-style-type: none"> <li>Sage ERP Accpac</li> <li>Sage ERP Accpac Online</li> <li>Sage ERP MAS 90 and 200</li> <li>Sage 100 ERP Online</li> </ul> |        |                      | <b>Sage ERP 1</b> = Sage ERP 1 + Sage ERP 2 + Sage ERP 3 |                 |                              |
| Sage ERP 2   | Sage ERP      | <ul style="list-style-type: none"> <li>Sage ERP MAS 500</li> </ul>  |        |                      | <b>Sage ERP 2</b> = Sage ERP 1 + Sage ERP 2 + Sage ERP 3 |                 |                              |
| Sage ERP 3   | Sage ERP      | <ul style="list-style-type: none"> <li>Sage ERP X3</li> </ul>   |        |                      | <b>Sage ERP 3</b> = Sage ERP 2 + Sage ERP 3              |                 |                              |
| Tier         | Threshold     |   | Margin |                      |  |                 |                              |
|              | New License   | Total Product   | NL%    | NL% + 2% Sage Select | IB%  | M&S% Sage ERP 1 | M&S% Sage ERP 2 / Sage ERP 3 |
| Diamond      | \$125,000     | \$250,000   | 58%    | 60%                  | 58%  | 30%             | 20%                          |
| Platinum     | \$62,500      | \$125,000   | 53%    | 55%                  | 53%  | 25%             | 18%                          |
| Gold         | \$32,500      | \$65,000  | 45%    | 47%                  | 45%  | 20%             | 16%                          |
| Silver       | \$10,000      | \$20,000  | 35%    | N/A                  | 35%  | 15%             | 14%                          |
| Bronze       | \$0           | \$10,000  | 25%    | N/A                  | 25%  | 10%*            | 10%*                         |

| Sage ERP 4-5 | Business Unit | Sage ERP Product Line   |                      | Category Combination for Threshold Attainment                                 |                 |                 |
|--------------|---------------|---|----------------------|---|-----------------|-----------------|
| Sage ERP 4   | Sage ERP      | <ul style="list-style-type: none"> <li>Sage Pro ERP</li> </ul>                              |                      | <b>Total Product Thresholds</b> = Sage ERP 4 + Sage ERP 5 + Value 1 + Value 2 |                 |                 |
| Sage ERP 5   | Sage ERP      | <ul style="list-style-type: none"> <li>Sage PFW ERP</li> <li>Sage Active Planner</li> </ul> |                      |   |                 |                 |
| Tier         | Threshold     |   | Margin               |   |                 |                 |
|              | Total Product | NL%   | NL% + 2% Sage Select | IB%   | M&S% Sage ERP 4 | M&S% Sage ERP 5 |
| Diamond      | \$100,000     | 45%   | 47%                  | 45%   | 30%             | 15%             |
| Platinum     | \$60,000      | 40%   | 42%                  | 40%   | 25%             | 13%             |
| Gold         | \$30,000      | 35%   | 37%                  | 35%   | 17%             | 11%             |
| Silver       | \$15,000      | 25%   | N/A                  | 25%   | 13%             | 8%              |
| Bronze       | \$5,000       | 20%   | N/A                  | 20%   | 9%              | 5%              |

**Note:** New License, Installed Base, and M&S margin for Sage ERP 4 and Sage ERP 5 products are based upon the tier earned from achieving the Total Product thresholds.

## Sage Construction and Real Estate Solutions

(Sage Master Builder, Sage Timberline Enterprise, Sage Timberline Office)

| Tier     | Threshold   |               | Margin |                      |     |      |
|----------|-------------|---------------|--------|----------------------|-----|------|
|          | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond  | \$180,000   | \$420,000     | 58%    | 60%                  | 58% | 14%  |
| Platinum | \$95,000    | \$210,000     | 53%    | 55%                  | 53% | 12%  |
| Gold     | \$50,000    | \$110,000     | 45%    | 47%                  | 45% | 10%  |
| Silver   | \$15,000    | \$45,000      | 35%    | N/A                  | 35% | 5%   |
| Bronze   | \$0         | \$10,000      | 25%    | N/A                  | 25% | 0%   |

**Sage CRM Solutions**

(Sage CRM, SageCRM.com, Sage SalesLogix)

| Tier     | Threshold   |               | Margin |                      |     |      |
|----------|-------------|---------------|--------|----------------------|-----|------|
|          | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond  | \$150,000   | \$300,000     | 58%    | 60%                  | 58% | 20%  |
| Platinum | \$75,000    | \$150,000     | 53%    | 55%                  | 53% | 18%  |
| Gold     | \$50,000    | \$75,000      | 45%    | 47%                  | 45% | 16%  |
| Silver   | \$10,000    | \$40,000      | 35%    | N/A                  | 35% | 14%  |
| Bronze   | \$0         | \$10,000      | 25%    | N/A                  | 25% | 10%* |

### Sage Nonprofit Solutions

| NPS 1: (Sage Fund Accounting, Sage Grant Management, Sage Fund Accounting EWS + Sage Fund Accounting HR) |             |               |        |                      |     |      |
|--|-------------|---------------|--------|----------------------|-----|------|
| Tier   | Threshold   |               | Margin |                      |     |      |
|  | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond  | \$200,000   | \$295,000     | 58%    | 60%                  | 58% | 20%  |
| Platinum   | \$95,000    | \$199,000     | 53%    | 55%                  | 53% | 15%  |
| Gold   | \$60,000    | \$95,000      | 45%    | 47%                  | 45% | 10%  |
| Silver   | \$30,000    | \$60,000      | 35%    | N/A                  | 35% | 5%   |
| Bronze   | \$0         | \$25,000      | 25%    | N/A                  | 25% | 0%   |

| NPS 2: (Sage Fundraising 50 and Sage Fundraising Online*) |             |               |        |                      |     |      |
|---|-------------|---------------|--------|----------------------|-----|------|
| Tier  | Threshold   |               | Margin |                      |     |      |
|   | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond   | \$30,000    | \$40,000      | 58%    | 60%                  | 58% | 20%  |
| Platinum  | \$20,000    | \$30,000      | 53%    | 55%                  | 53% | 15%  |
| Gold  | \$15,000    | \$25,000      | 45%    | 47%                  | 45% | 10%  |
| Silver  | \$10,000    | \$15,000      | 35%    | N/A                  | 35% | 5%   |
| Bronze  | \$0         | \$5,000       | 25%    | N/A                  | 25% | 0%   |

\*SFO earns 25% of total contract price, exclusive of donation residuals, regardless of Tier/Margin Level. Net to Sage will be applied to Tier & Margin threshold.

**Note:** At this time multi-tier benefits still apply, subject to change.

### Sage FAS Solutions

| <b>(Sage FAS)</b> |             |               |        |                      |     |      |
|-------------------|-------------|---------------|--------|----------------------|-----|------|
| Tier              | Threshold   |               | Margin |                      |     |      |
|                   | New License | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond           | \$60,000    | \$90,000      | 58%    | 60%                  | 58% | 18%  |
| Platinum          | \$30,000    | \$45,000      | 53%    | 55%                  | 53% | 16%  |
| Gold              | \$15,000    | \$25,000      | 45%    | 47%                  | 45% | 13%  |
| Silver            | \$10,000    | \$15,000      | 35%    | N/A                  | 35% | 10%  |
| Bronze            | \$0         | \$10,000      | 25%    | N/A                  | 25% | 5%*  |

### Sage Employer Solutions

| <b>(Sage HRMS)</b> |             |               |   |                      |     |                |                  |
|--------------------|-------------|---------------|---|----------------------|-----|----------------|------------------|
| Tier               | Threshold   |               | Margin WITH SQL Certification on HRMS AND Payroll |                      |     |                |                  |
|                    | New License | Total Product | NL%   | NL% + 2% Sage Select | IB% | M&S% Gold Plan | M&S% Silver Plan |
| Diamond            | \$90,000    | \$160,000     | 58%   | 60%                  | 58% | 18%            | 16%              |
| Platinum           | \$45,000    | \$80,000      | 53%   | 55%                  | 53% | 16%            | 14%              |
| Gold               | \$22,500    | \$40,000      | 45%   | 47%                  | 45% | 13%            | 11%              |
| Silver             | \$15,000    | \$27,500      | 35%   | N/A                  | 35% | 10%            | 8%               |
| Bronze             | \$0         | \$15,000      | 25%   | N/A                  | 25% | 5%             | 3%               |

  

| Tier     | Threshold   |               | Margin WITHOUT SQL Certification on HRMS AND Payroll |                      |     |                |                  |
|----------|-------------|---------------|--|----------------------|-----|----------------|------------------|
|          | New License | Total Product | NL%  | NL% + 2% Sage Select | IB% | M&S% Gold Plan | M&S% Silver Plan |
| Diamond  | \$90,000    | \$160,000     | 53%  | 55%                  | 53% | 16%            | 14%              |
| Platinum | \$45,000    | \$80,000      | 45%  | 47%                  | 45% | 13%            | 11%              |
| Gold     | \$22,500    | \$40,000      | 35%  | 37%                  | 35% | 10%            | 8%               |
| Silver   | \$15,000    | \$27,500      | 25%  | N/A                  | 25% | 5%             | 3%               |
| Bronze   | \$0         | \$15,000      | 20%  | N/A                  | 20% | 3%             | 0%               |

### Sage Value Solutions

| Value    | Business Unit | Sage Value Solutions Product Line | Category Combination for Threshold Attainment                                 |     |              |              |
|----------|---------------|-----------------------------------|---|-----|--------------|--------------|
| Value 1  | Value         | • Sage BusinessWorks Accounting   | <b>Total Product Thresholds</b> = Value 1 + Value 2 + Sage ERP 4 + Sage ERP 5 |     |              |              |
| Value 2  | Value         | • Sage TimeSheet                  |   |     |              |              |
| Tier     | Threshold     | Margin                            |   |     |              |              |
|          | Total Product | NL%                               | NL% + 2% Sage Select  | IB% | M&S% Value 1 | M&S% Value 2 |
| Diamond  | \$100,000     | 45%                               | 47%   | 45% | 30%          | 15%          |
| Platinum | \$60,000      | 40%                               | 42%   | 40% | 25%          | 13%          |
| Gold     | \$30,000      | 35%                               | 37%   | 35% | 17%          | 11%          |
| Silver   | \$15,000      | 25%                               | N/A   | 25% | 13%          | 8%           |
| Bronze   | \$5,000       | 20%                               | N/A   | 20% | 9%*          | 5%*          |

| Value 3: (Sage BusinessVision) |               |        |                      |     |      |
|--------------------------------|---------------|--------|----------------------|-----|------|
| Tier                           | Threshold     | Margin |                      |     |      |
|                                | Total Product | NL%    | NL% + 2% Sage Select | IB% | M&S% |
| Diamond                        | \$25,000      | 50%    | 52%                  | 50% | 20%  |
| Platinum                       | \$20,000      | 45%    | 47%                  | 45% | 20%  |
| Gold                           | \$10,000      | 40%    | 42%                  | 40% | 20%  |
| Silver                         | \$5,000       | 25%    | N/A                  | 25% | 20%  |
| Bronze                         | \$0           | 20%    | N/A                  | 20% | 10%  |

Sage BusinessVision Sales Requirements to maintain Reseller Partner status will remain as follows:

- Annual minimum of a \$1,000 in net to Sage product sales.
- Any New to Sage customer (New License or Winback) excluding Limited Edition.

**Note:** New License, Installed Base, and M&S margin for Value Products are based upon the tier earned from achieving the Total Product thresholds.

### Tier Calculation Examples

The following chart shows two examples of how tier and margin are determined.

| Examples   | Tier Earned | Margin   |
|--|-------------|--|
| <p><b>Sage ERP 1 &amp; 2 business partner</b></p> <ul style="list-style-type: none"> <li>• Sells Sage ERP MAS 90 and Sage ERP MAS 500</li> <li>• Total Product = \$95,000</li> <li>• New License = \$45,000</li> </ul> | Gold        | <ul style="list-style-type: none"> <li>• 45% margin for New License revenue (47% if Sage Select)</li> <li>• 45% margin for Installed Base revenue</li> <li>• 20% margin for Sage ERP 1 M&amp;S revenue</li> <li>• 16% margin for Sage ERP 2 M&amp;S revenue</li> </ul> |
| <p><b>CRE business partner</b></p> <ul style="list-style-type: none"> <li>• Sells Sage Timberline</li> <li>• Total Product = \$175,000</li> <li>• New License = \$35,000</li> </ul>                                    | Silver      | <ul style="list-style-type: none"> <li>• 35% margin for New License revenue</li> <li>• 35% margin for Installed Base revenue</li> <li>• 5% margin for CRE M&amp;S revenue</li> </ul>   |

## Hosted Product Tier Schedule

Hosted product margins are the same for each of the tier levels based on the chart below. The following hosted product tier schedule rules apply for the following hosted solutions:

| Sage ERP Accpac On-Line, Sage ERP MAS Online, SageCRM.com, and NPS Virtual Services |        |
|---|--------|
| Tier  | Margin |
| Diamond   | 25%    |
| Platinum  | 25%    |
| Gold  | 25%    |
| Silver  | 25%    |
| Bronze  | 25%    |

Tier attainment for the first 36 months of the initial sale will count toward both New License and Total Product thresholds.

- After 36 months, all tier attainment will count only toward Total Product threshold.

**Note:** Starting October 1, 2012, the 36 month rule will be applied to existing customers who have been on a hosted solution prior to the new hosted tier program's effective date. For example, if a customer's initial hosted solution was purchased on October 1, 2010, tier credit for this customer would count toward New License and Total Product thresholds through October 1, 2013 (36 months).

- If customer commits to a monthly contract, then partner will receive tier credit and margin for the hosted product monthly as the customer is invoiced.
- If customer commits to prepay for a contract of 12 months or more, at the time of the initial contract order or contract renewal when the customer is invoiced, the partner will receive tier credit and margin up front for the full invoiced amount.



## Additional Tier Benefit Programs

### Complementary Tier Bonus Program

- Business partners can earn additional tier dollars toward their Sage ERP, CRE, NPS, and Value New License and Total Product thresholds for sales of complementary products.
- The following products are considered complementary when sold to a new or existing Sage ERP, CRE, NPS, or Value customer:

| Complementary Products |                            |
|------------------------|----------------------------|
| Sage HRMS              | Sage FAS                   |
| Sage Active Planner    | Sage Fundraising 50        |
| Sage CRM               | Sage SalesLogix            |
| SageCRM.com            | Sage Timberline Estimating |
| Sage TimeSheet         |                            |

- The complementary tier bonus is CAPPED at 20% of your current starting Total Product and New License tier qualifying sales for the rolling 12 months at each evaluation period. The cap will only apply to the complementary tier bonus portion of the sale.
- The full complementary product sale will also count toward the main product line category threshold.
- The complementary product must be a New License sale to qualify under this program.
- Complementary product sales will not be applied to the Sage ERP, CRE, NPS, and Value New License and Total Product thresholds if it is a stand-alone sale to a customer who does not own any Sage ERP, CRE, NPS, and Value products.
- Must be the current reseller of record at the time of the order.

| Examples   | Complementary Tier Bonus Calculation   |
|--|--|
| <p><b>Sage ERP 1 &amp; 2 business partner that is also authorized to sell Sage HRMS:</b></p> <ul style="list-style-type: none"> <li>• Presently at Platinum Tier</li> <li>• Places the following order for one customer:                             <ul style="list-style-type: none"> <li>- Sage ERP MAS 500</li> <li>- Sage HRMS sale = \$25,000 (net revenue to Sage) for product and M&amp;S</li> </ul> </li> </ul> | <p><b>Sage HRMS product portion of the sale is \$20,000 and will be counted as follows:</b></p> <p>Sage HRMS product portion of the sale is \$20,000 and will be counted as follows:</p> <ul style="list-style-type: none"> <li>• \$20,000 will go toward the Total Product threshold because it is within the bonus cap of \$25,000 for Platinum tier level for Sage ERP (i.e. 20% of \$125,000 Total Product threshold).</li> <li>• Only \$12,400 of the \$20,000 will apply toward the New License threshold for Sage ERP because the Sage HRMS sale is over the \$12,400 complementary tier bonus cap for New License (i.e. 20% of \$62,000 New License threshold).</li> <li>• The full \$20,000 product portion of the sale will apply to their Total Product and New License thresholds and the Sage HRMS sale will also count toward the business partner's ES tier.</li> </ul> |

## Multi-Product Tier Benefit Program

- Business partners who are authorized for multiple Sage product lines will receive the highest tier level that they achieve, and it will be applied to all of the Sage products for which they are authorized. This program does not apply to Sage ERP X3.
- Platinum tier is the highest tier level that can be applied across the product lines through the program.
- Example: If a business partner earns a Diamond tier level for one product line that they represent, then this would raise their tier to the Platinum level for the rest of the Sage product.

| Multi-Product Tier Benefit |                        |
|----------------------------|------------------------|
| Highest Product Tier:      | Raises Other Tiers To: |
| Diamond                    | Platinum               |
| Platinum                   | Platinum               |
| Gold                       | Gold                   |
| Silver and Bronze          | Not eligible           |

### Sage Select

The Sage Select program rewards all business partners who exclusively sell and support Sage products in the marketplace with additional benefits. Sage business partners are eligible to earn these benefits by maintaining a minimum required Silver product tier level or above in at least one Sage product line. Additional information on the Sage Select program can be found on the **Sage Partner Marketing Resource Center** under the **Partner Programs** tab: [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com).

### Changes to Business Partner Tier Benefit Program

Sage reserves the right to change the Business Partner Tier Benefit Program at its sole discretion.

# Sage Mid-Market Certification and Authorization

## Program Overview

When you partner with Sage, either as an authorized business partner or as a certified consultant, we work together for mutual success. You'll be delighted with the program benefits, expert competency training, support resources, partner programs, and the network of professionals around the globe who are ready to help you achieve your goals.

The effective start date of this program is November 1, 2011. The new competency role certification requirements for each Sage Product line are listed on Sage University.

This program applies to the following Sage product lines:

- Sage Abra
- Sage BusinessWorks
- Sage BusinessVision
- Sage CRM
- Sage ERP Accpac
- Sage ERP Accpac Online
- Sage ERP MAS 90 and 200
- Sage ERP MAS 90 Online
- Sage ERP MAS 500
- Sage ERP X3
- Sage FAS
- Sage Fund Accounting
- Sage Fundraising 50
- Sage Fundraising Online
- Sage PFW ERP
- Sage Pro ERP
- Sage SalesLogix
- Sage TimeSheet

### ● Definitions

#### **Authorization**

The entitlement to be affiliated with Sage in a specified capacity on a yearly renewal basis. Authorizations are held at a business partner company level, not an individual level.

#### **Certification**

The designation of an individual's capability to effectively support Sage solutions. Certifications are held by individuals, not organizations and may include required fees, training and/or assessment testing. Certification requirements differ by product line.

### ● Types of Partnerships

#### **Sage Authorized Business Partner**

Organizations that are authorized to resell and support Sage products and services. Business Partners obtain authorization on product lines by achieving each product line's required competencies and by maintaining annual competency certification renewals through their designated Certified Consultants.

#### **Sage Certified Consultant**

Individuals within a partner organization who have completed at least one designated Competency Role for Sage products are certified to provide professional services to end customers for those competencies in which they are certified.

#### **Independent Sage Certified Consultant**

Independent individuals who have completed at least one designated Competency Role for Sage products and are certified to provide professional services to end customers for those competencies in which they are certified.

| Program   | Benefits   | Minimum Requirements   |
|---|--|--|
| <p><b>Sage Authorized Business Partner (BP)</b></p> | <p>Receive competitive product margin discounts, access to online websites and training, marketing materials, and opportunities to receive leads and sales assistance.</p> | <ul style="list-style-type: none"> <li>• Obtain and maintain annual product line Competency Role requirements with at least one designated Certified Consultant.</li> <li>• Must meet minimum channel partner product line sales requirements per program year.</li> </ul>   |
| <p><b>Sage Certified Consultant (CC)</b></p>        | <p>Receive support entitlement, access to recertification training, assessments, and select complimentary courses on Sage University.</p>                                  | <ul style="list-style-type: none"> <li>• Individual and Independent CC's become Sage certified consultants after completing one or more product line Competency Roles.</li> <li>• Achieve annual re-certifications as provided by the product line.</li> </ul> <p><i>*Sage Certified Consultants may be independent consulting firms if allowed by the product line.</i></p> |

## Sage Authorized Business Partner Program

Sage business partners re-sell and support a vast portfolio of industry-leading solutions. They benefit from industry-leading products, generous margins, award-winning support services, superior marketing and sales programs, training, and cross-product selling opportunities.

### Program Benefits

Authorized Sage Business Partners receive the following benefits:

- Authorization to sell selected Sage products.
- Not-for-resale edition of authorized products and discounts on other Sage products and services for business use.
- Access to the online Sage Partner Marketing Resource Center for valuable sales and marketing tools including customizable brochures, datasheets, online videos and more.
- Highly competitive margin on Sage products for resale.
- Highly competitive margin on customer annual maintenance plans and customer support services.
- Up to 6% in co-op dollars to help lower your marketing expenses for lead-generating activities promoting Sage products.
- Access to field based and online training in the areas of business development, leadership, sales and consulting.
- Sage authorized business partner logo usage for marketing purposes.

### Program Requirements

- Abide by terms and conditions outlined in the Channel Partner agreement.
- Maintain contacts on your Sage business partner account who meet the Certified Consultant Competency Role requirements for your authorized product lines.
- Meet minimum channel partner product line sales requirements.
- Pay annual product line and consultant fees.

### Certification Requirements

- Authorized business partners achieve and maintain annual authorization by having at least one designated\* consultant on their Sage account who meets the minimum required product line competency role certifications.
- Each Consultant must complete all courses in a competency role and pass the associated assessment, if provided, to achieve certification status.
- Consultants must successfully achieve all required product line competency role certifications to validate the business partner authorization and certifications.
- A score of 80%+ is required to pass each competency role, if an assessment is provided.
  - One free second attempt at an assessment per certified consultant role is provided at no cost.
  - Additional assessment attempts incur a \$200 fee. (Pre-approval from Sage is required for additional attempts.)



- Existing Certified Consultants may achieve additional Competency Role certifications within the same product line by challenging provided assessments in other Competency Roles:
  - The fee to challenge the Competency Role assessment and gain certification without attending the courses in the Competency Role is \$200. If the assessment is not passed, the Certified Consultant must pay the initial Competency Role fee, attend the course and pass the assessment.
  - A score of 80% + is required to pass each Competency Role
- Competency Roles with pre-requisite certifications must be completed by the same consultant.
- Certified Consultants must complete annual renewal Competency Role re-certification and testing, when required.
- Business partners who desire to use Sage Professional Services (PSG) to fulfill required competencies must have a written agreement in place with PSG prior to annual renewal.

*\* All consultants must be listed as a contact on the business partner's Sage account in order for the consultants Competency Role certifications to count toward the fulfillment of the business partners authorization requirements.*

### Certification Compliance

- Sage business partners have 120 days from the start of authorization to achieve the required Competency Role certifications. During this period, the partner is eligible to receive full margin on all software sales. If a partner needs to add or replace a consultant, each consultant will have 120 days to achieve required competency role certifications. Some product lines may require partners to engage with Sage Professional Services until they demonstrate product competency. In this case, at the discretion of Sage, margins may be adjusted.
- If certification is not met within 120 days, the business partner will be placed on probation for 90 days for the product line in which they have not met the certification requirements. During this 90 day extension, the partner will earn a 20 percent margin on their product line orders and a 0 percent margin on all Maintenance and Support sales from their product line. Once the partner meets certification, the partner will not have the ability to earn back any lost margin as a result of their probationary status.
- If after the probationary period the partner has not satisfactorily completed all certification requirements, the partner will become de-authorized and Sage customers will be reassigned. If a de-authorized partner wishes to become authorized again, the partner must go through the enrollment authorization process again and pay all appropriate fees. This includes paying the New Partner Authorization Fee as well as re-taking all applicable certification requirements.
- Some Sage product lines may require assistance from Sage Professional Services for the first few implementations. For details on Sage Professional Services, visit [www.sagepartneruniversity.com](http://www.sagepartneruniversity.com).

### Sage Competency Roles

Sage is committed to helping Certified Consultants deliver extraordinary customer experiences by providing extensive competency training. Competency Role certification is required to help consultants gain valuable product knowledge and increase related skill sets.

Each Sage product line will have at least one Competency Role that is required for partner authorization. However, the number of Competency Roles and the number of courses within a Competency Role differ product to product, depending on the requirements of the product line.

Sage Competency Roles for major disciplines are common across Sage product lines. For example, many Sage products will have an Application Consultant role. The major Competency Role titles generally used across Sage product lines are as follows:

#### Product

- Application Consultant
- Technical Consultant
- “Vertical” Consultant (e.g. Manufacturing, Payroll, Accpac CRM Consultant)
- Implementation Consultant

#### Skills

- Developer Consultant
- Sales Consultant
- Advisor (For Sage Accountants Network, etc.)
- Certified Trainer

Required Product Line Competency Roles

**Products – Group A**

| Competency Role Title     | Sage ERP        |                 |                  |                 |                 | Sage Fixed Assets |
|---------------------------|-----------------|-----------------|------------------|-----------------|-----------------|-------------------|
|                           | Sage ERP Accpac | Sage ERP MAS 90 | Sage ERP MAS 500 | Sage ERP X3 Pre | Sage ERP X3 Std | Sage FAS          |
| Application Consultant    | ●               | ●               | ●                | 2               | ●               | ●                 |
| Technical Consultant      | ●               | ●               | ●                | ●               | ●               |                   |
| Developer Consultant      |                 |                 |                  | ●               |                 |                   |
| “Vertical” Consultant     | *               | *               | *                | ●               | ●               |                   |
| Implementation Consultant | 1               | 1               | 1                | 1               | ●               | ●                 |
| Sales Consultant          |                 |                 |                  | ●               | ●               |                   |

**Products – Group A**  
(Continued)

| Competency Role Title     | Sage CRM Solutions |          | Sage Nonprofit Solutions |                      | Sage Employer Solutions |
|---------------------------|--------------------|----------|--------------------------|----------------------|-------------------------|
|                           | Sage SalesLogix    | Sage CRM | Sage Fundraising 50      | Sage Fund Accounting | Sage Abra               |
| Application Consultant    |                    |          | 2                        | 2                    | ●                       |
| Technical Consultant      |                    |          |                          |                      | ●                       |
| Developer Consultant      | ●                  |          |                          |                      |                         |
| “Vertical” Consultant     |                    |          |                          |                      | ●                       |
| Implementation Consultant | ●                  | ●        |                          |                      |                         |
| Sales Consultant          |                    |          |                          |                      |                         |

**Products – Group B**

|                        | Sage Nonprofit Solutions | Sage ERP |          | Value Solutions     |                    |
|------------------------|--------------------------|----------|----------|---------------------|--------------------|
| Competency Role Title  | Sage Fundraising Online  | Sage Pro | Sage PFW | Sage BusinessVision | Sage BusinessWorks |
| Application Consultant | 2                        | ●        | ●        | ●                   | ●                  |

Group B products may not have comprehensive Competency Role training. Annual re-certification training is applicable if new release training is required.

\* Vertical Consultant competency (e.g. Certified Manufacturing Consultant) certification is required when selling vertical modules and may require a pre-requisite competency role. (Although a certification fee is applicable, a separate Product Line fee may not be required.)

1 The Implementation Consultant Competency Role may require another Competency Role (typically the Application Consultant role) as a pre-requisite.

2 These roles have multiple competency requirements.

Product Line Competency Role requirements are subject to change. Please refer to the product line certification roles on Sage University for a complete list of current requirements.

**How to get started?**

• **Sage Authorized Business Partner**

Whether you're new to the Sage partner program or an existing partner interested in additional Sage products, contact us at [newpartner@sage.com](mailto:newpartner@sage.com) or visit [www.sagenorthamerica.com/Partners/Authorized-Business-Partners/Become-an-Authorized-Partner](http://www.sagenorthamerica.com/Partners/Authorized-Business-Partners/Become-an-Authorized-Partner).

• **Certified Consultant**

To register for a new Sage product line Competency Role, visit the certification area on [www.sagepartneruniversity.com](http://www.sagepartneruniversity.com) to get started, or email us at [partneruniversity@sage.com](mailto:partneruniversity@sage.com).

## Sage Certified Consultant Program

Certified Consultants are highly specialized individuals who have participated in a series of advanced training courses. These courses are offered in specialty Competency Role learning tracks and prepare consultants to provide valuable consulting services to their clients.

Sage Certified Consultants are primarily employees of Sage authorized business partners but may be independent consultants. Independent consultants may satisfy required competencies for Sage business partners if approved by the product line. In this event, the independent consultant must be designated on the partners Sage Account as a contact and may only satisfy competency requirements for one partner.

### Program Benefits

Competency Role certification fees entitle active Certified Consultants to receive the following benefits:

- Access to Sage University Competency Role certification training.
- Access to authorized product re-certification training on Sage University for annual competency re-certification, when required.
- Access to select non-certification courses on Sage University at no charge.
- Access to specific online training libraries for their certified product on Sage University at no charge (**Note:** No charge product training libraries may not be available for some product lines.)
- Sage technical support call entitlement for achieved competency role support.
- CPE credits for approved courses and conference workshops.
- Sage Certified Consultant logo.

Independent Certified Consultants will receive Not-For-Resale software for in-house use when they pay either the new Competency Role fee or the annual consultant renewal fee. Independent Consultants must also maintain annual re-certifications to remain certified and receive support entitlement.

### Program Requirements

- Upon acceptance into the program, abide by program terms and conditions.
- Successful completion of Competency Role training and achievement of accompanying assessment, if provided, with a score of 80%+.
- One free second attempt at an assessment per Certified Consultant role is provided at no cost.
- Additional assessment attempts incur a \$200 fee. (Pre-Approval from Sage is required for additional attempts.)
- Existing Certified Consultants may achieve additional Competency Role certifications within the same product line by challenging provided assessments in other Competency Roles:
  - The fee to challenge the Competency Role assessment and gain certification without attending the courses in the Competency Role is \$200. If the assessment is not passed, the Certified Consultant must pay the initial Competency Role fee, attend the course and pass the assessment.
  - A score of 80%+ is required to pass each Competency Role.
- Competency Roles with pre-requisite certifications must be completed by the same consultant.
- Certified Consultants must complete annual renewal of Competency Role re-certification and testing, when required.

## Program Fees

### Sage Business Partner Authorization Fees

An initial enrollment fee and an annual authorization renewal fee is applicable for each Sage product line that a Sage Business Partner maintains. The enrollment fee is due upon acceptance into the program and the annual renewal fee is due on the anniversary date. Companion products (See Companion Products table below) may not require a fee if the primary product line fee is paid.

| Product Group            | Product Line                 | Enroll Fee | Renewal Fee |
|--------------------------|------------------------------|------------|-------------|
| Sage ERP                 | Sage ERP Accpac              | \$3000     | \$1000      |
|                          | Sage ERP Accpac Online*      |            |             |
|                          | Sage CRM for Sage ERP Accpac |            |             |
|                          | Sage ERP MAS 90 and 200      | \$3000     | \$1000      |
|                          | Sage ERP MAS 90 Online*      |            |             |
|                          | Sage CRM for Sage ERP MAS    |            |             |
|                          | Sage ERP MAS 500             | \$3000     | \$1000      |
|                          | Sage PFW ERP                 | N/A        | \$500       |
|                          | Sage Pro ERP                 | N/A        | \$500       |
|                          | Sage ERP X3 Premium          | \$3000     | \$1000      |
| Sage ERP X3 Standard     | \$3000                       | \$1000     |             |
| Sage Nonprofit Solutions | Sage Fund Accounting         | \$3000     | \$1000      |
|                          | Sage Fundraising 50          | \$3000     | \$1000      |
|                          | Sage Fundraising Online*     |            |             |
| Sage Fixed Assets        | Sage FAS                     | \$3000     | \$1000      |
| Sage CRM Solutions       | Sage SalesLogix              | \$3000     | \$1000      |
|                          | Sage CRM                     | \$3000     | \$1000      |
|                          | SageCRM.com                  |            |             |
| Sage Employer Solutions  | Sage Abra                    | \$3000     | \$1000      |
| Value Solutions          | Sage BusinessWorks           | \$3000     | \$500       |
|                          | Sage BusinessVision          | \$3000     | \$500       |
|                          | Sage TimeSheet*              |            |             |

\*Companion product



### Companion Products

Companion products are categorized as products with similar feature sets, authorization and certification requirements as their primary product lines. Partners may become authorized on one or the other, or both. If a partner obtains authorization on both, only one initial and renewal authorization fee is applicable. However, Companion products may require additional Competency Role certification requirements.

For example, if a consultant has completed all required Competency Role certification on Sage Accpac ERP (primary product line), an additional Competency Role may be required to complete certification for Sage ERP Accpac Online (Companion product).

| Product Group            | Primary Product Line | Companion Product       |
|--------------------------|----------------------|-------------------------|
| Sage ERP                 | Sage ERP Accpac      | Sage ERP Accpac Online  |
|                          | Sage ERP Accpac      | Sage Accpac CRM         |
|                          | Sage ERP MAS 90      | Sage ERP MAS 90 Online  |
|                          | Sage ERP MAS 90      | Sage MAS CRM            |
| Sage CRM Solutions       | Sage CRM             | SageCRM.com             |
| Sage Nonprofit Solutions | Sage Fundraising 50  | Sage Fundraising Online |

*\*Sage TimeSheet is a companion product for Sage ERP Accpac, Sage ERP MAS90/500, and Sage Abra*

### Multiple Office Locations

Although maintaining a unique Sage Account for each office is not required, if a Sage Business Partner has multiple office locations, the standard product line authorization and renewal fees apply to each additional office location that maintains a unique Sage Account. In addition, each location that maintains a Sage Account must comply with the product line certification requirements by having Certified Consultants achieve and maintain the Competency Role training for authorized product lines.

### Additional Business Partner Program Benefits

Authorized business partners will receive the following additional benefits:

| Program                                      | Details                                     | Benefits  |
|--|---|---|
| Partners with Multiple Certified Consultants | Renewal fee discount for each CC            | 6-10 CC's = 20% discount<br>11+ CC's = 30% discount |
| Sage Select*                                 | Partners who exclusively sell Sage products | 1 Free CC<br>1 Free Product Line Fee                |

*\*Business partners in the Sage Select program who are Gold tier level or higher, receive one complimentary Certified Consultant renewal fee and one complimentary product line renewal fee annually. For Sage Select partners who are authorized for multiple products, these special benefits will be applied to the product line with the highest tier revenue.*

## Sage Certified Consultant Fees

### New Product Line Competency Roles

Upon acceptance into the program, Certified Consultants pay an initial enrollment fee for each required Product line Competency Role. This fee provides the consultant with:

- First year access to Sage University for defined learning roles.
- All courses in the Competency Role, initial assessment and a second assessment retake, if necessary.
- First year entitlement of 5 cases to contact Sage Support for questions related to achieved competency.
- Access to select non-certification courses on Sage University.

|  | Fees            |
|--|-----------------|
| Initial Competency Role Fee – Includes Assessment                        | \$1000 per role |
| Second Assessment Attempt if below 80%                                   | n/c             |
| Third Assessment Attempt if still below 80%*                             | \$200           |
| Challenge Competency Role Assessment without paying initial training fee | \$200           |

\*Additional assessment attempts must be approved by Sage

### Annual Product Line Renewal

Certified Consultants pay a single annual product line renewal fee, regardless of the number of achieved product line Competency Roles. This fee provides the following benefits:

- Unlimited access to re-certification curriculum and assessments for all achieved competencies. (An additional charge for annual renewal certification provided in either a classroom or virtual classroom format will apply.)
- Access to specified learning courses on Sage University for Certified Consultants at no charge.\*
- Access to select online product training libraries for certified product lines at no charge.\*
- Entitlement to call Sage Support for questions specific to achieved competencies.
  - Unlimited calls to Sage Support when assisting customers on a Sage Support plan. (The total calls per customer are based on the customer's Support Plan case count.)
  - Complimentary support cases per product line, if any. (Determined by each product line.)
- Ability to call as necessary when requesting product enhancements or reporting product issues.

**Note:** Sage may introduce new product line Competency Roles during the renewal year and require partners and CC's to earn certification on the new role. In this event, new Competency Role fees and the requirement must be achieved within 120 days.

\*For details on the specific courses and training libraries that apply, visit Sage University at [www.sagepartneruniversity.com](http://www.sagepartneruniversity.com).

### Certified Consultant Annual Renewal Fees

|   | Fees  |
|---|-------|
| Annual Product Line Renewal Fee (Group A)             | \$650 |
| Annual Product Line Renewal Fee (Group B)             | \$350 |
| Required annual online Re-certification Training*     | n/c   |
| Access to select Sage University libraries or courses | n/c   |

\*Renewal classroom or online instructor-led classroom re-certification. Up to \$200 per class day.

**Note:** If Certified Consultants hold competency certifications on multiple product lines, they pay the annual renewal fee for each product line. The multiple consultant discount applies to the total CC's in a company, even when one CC holds certifications across product lines.

For a listing of Group A Sage Product Lines, refer to the product line table on page 53.

Group B Sage Product Lines include:

- Sage BusinessVision
- Sage Business Works
- Sage Fundraising Online
- Sage PFW ERP
- Sage Pro ERP

**Note:** Product lines in Group B are subject to change. Please see renewal fees by product line on Sage University.

**Certified Consultant Case Entitlement**

|   | Cases  |
|---|--|
| Calls on behalf of customers with a Gold Support Plan*      | Unlimited  |
| Calls on behalf of customers with a Silver Support Plan*    | Based on the number of Customer plan cases available |
| Complimentary cases, if any, for personal use               | See Product Case Table on page 64                    |
| Ability to purchase additional cases                        | Five Cases for \$750                                 |
| Calls requesting a product enhancement or reporting defects | Unlimited  |

*\*When calling on behalf of customers with a support plan, customer cases will be used. Customers must provide consent either by opening a case with Sage Support or by jointly calling with the Certified Consultant.*

### Product Case Table

The following cases, if any, are provided annually. The qualified usage of complimentary cases are defined by each product line's support group.

| Product Line            | CC Cases per annual CC product line fee |
|-------------------------|---|
| Sage ERP Accpac         | 10                                      |
| Sage ERP MAS 90 and 200 | 10                                      |
| Sage ERP MAS 500        | 10                                      |
| Sage PFW ERP            | 10                                      |
| Sage Pro ERP            | 10                                      |
| Sage ERP X3 Premium     | 10                                      |
| Sage ERP X3 Standard    | 10                                      |
| Sage PFW                | 10                                      |
| Sage Fund Accounting    | 10                                      |
| Sage Fundraising 50     | 10                                      |
| Sage FAS                | 10                                      |
| Sage SalesLogix         | 10                                      |
| Sage CRM                | 10                                      |
| Sage Abra               | 0                                       |
| Sage BusinessWorks      | 10                                      |
| Sage BusinessVision     | 10                                      |

### How to get started?

- Create a Profile on [www.sagepartneruniversity.com](http://www.sagepartneruniversity.com).
- Add your Business Partner account number to your Profile.
- Register for your Sage Competency Roles.

## Payments and Terms

### Sage Business Partners

Sage business partners are required to submit their product line authorization fee(s) for each location with a Sage Account when they join the program. The annual renewal fee is due 12 months from the original enrollment date. Partners may renew their product line authorization status if one or more of their Sage Certified Consultants have completed the required product line Competency Roles. See Certification Compliance on page 51 for details.

### Sage Certified Consultants (CC)

Sage Certified Consultants pay the initial Competency Role fee when they register for the competency role on Sage University. The Certified Consultant product line annual renewal fee is also paid on Sage University each year.

The Sage Certified Consultants annual renewal product line fee must be current in order to gain access to re-certification training, related training on Sage University, and maintain Sage Support assistance.

- Payment notification for both programs will begin 2 months prior to the established due dates. The CC annual renewal fee will increase to \$850 if not paid by the established due date and increase to \$1,000 per product line if not paid within 60 days of the established due date.
- If a CC opts out of the annual renewal for a Competency Role when the renewal is due, and decides to “re-join” after the 60 day period, the CC must be re-accepted into the program and pay the initial Competency Role fee.
- If a consultant wants to attend a certification class, and not become a CC, they pay the list price for each course. *(Not the discounted Competency Role price)*



Introduction

Partner Programs

Tier Benefit Program

Certification and  
Authorization



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