



Sage Mid-Market

Channel partner certification and
authorization overview

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 network of professionals around the globe who are ready to help you achieve your goals.

This program applies to the following Sage product lines:

Sage 100 ERP	Sage 500 ERP	Sage ERP X3
Sage 100 Standard ERP Online	Sage BusinessWorks Accounting	Sage Fixed Assets
Sage 300 ERP	Sage BusinessVision Accounting	Sage HRMS
Sage 300 Online	Sage CRM	

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 partners are 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 consultants are individuals within a partner organization who have completed at least one designated competency role for Sage products. They are certified to provide professional services to end customers for those competencies in which they are certified.

Program	Benefits	Minimum requirements
Sage authorized business partner (BP)	Receive competitive product margin discounts, access to online websites and training, marketing materials, and opportunities to receive leads and sales assistance.	<ul style="list-style-type: none"> Obtain and maintain annual product line competency role requirements with at least one designated certified consultant. Must meet minimum channel partner product line sales requirements per program year.
Sage certified consultant (CC)	Receive support entitlement, access to recertification training, assessments, and select complimentary courses on Sage University.	<ul style="list-style-type: none"> Individual CCs become Sage certified consultants after completing one or more product line competency roles. Achieve annual recertifications as provided by the product line.

Sage authorized business partner program

Sage business partners resell 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 Sell](#) website for valuable sales and marketing tools including customizable brochures, datasheets, and more
- Highly competitive margin on Sage products for resale
- Highly competitive margin on customer annual maintenance plans and customer support services
- 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 Sage 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. (Preapproval from Sage is required for additional attempts.)
- Sage authorized business partner logo may be used for marketing purposes.
- Existing certified consultants may achieve competency role certifications by challenging provided assessments:
 - 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 prerequisite certifications must be completed by the same consultant.
- Certified consultants must complete annual renewal competency role recertification and testing, when required. For details on recertification visit the Partner's Recertification area on the SageU.com welcome page.
- Business partners who want 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 contacts on the business partner's Sage account in order for the consultants' competency role certifications to count toward the fulfillment of the business partner's authorization requirements.

**This option is only available for Sage ERP X3, Sage Fixed Assets, and Sage HRMS.

Certification compliance

- Sage business partners have 180 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 180 days, the business partner will be placed on probation for the product line in which he has not met the certification requirements. During this time the partner will earn a 0% margin on all product, maintenance, and support sales from his product line. Once the partner meets certification, the partner will not have the ability to earn back any lost margin as a result of his probationary status.
- If after the probationary period the partner has not satisfactorily completed all certification requirements, the partner will become deauthorized, and Sage customers will be reassigned. If a deauthorized partner wishes to become authorized again, the partner must go through the enrollment authorization process again and pay all appropriate fees.
- For the Sage ERP X3 product line, it is required that the first two implementations are completed by PSG. For additional details, contact: PSGAssistance@sage.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 has 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 from 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 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 (for example, manufacturing, payroll)
- Implementation consultant

Skills

- Developer consultant
- Sales consultant
- Advisor (for Sage Accountants Network and so on)
- Certified trainer

Required product line competency roles

Group A:

Competency role	Sage 300 ERP	Sage 100 ERP	Sage 500 ERP	Sage ERP X3	Sage Fixed Assets	Sage CRM	Sage HRMS
Application consultant	■	■	■	■	■		■
Technical consultant	■	■	■	■			■
Developer consultant				■			
"Vertical" consultant				■			
Implementation consultant	■	■	■	■	■	■	
Sales consultant				■	■		

Group B: Sage ERP product and value solutions

Competency role	Sage BusinessWorks	Sage BusinessVision	Sage 300 Online
Application consultant	■	■	■
Sage Intelligence reporting			■

Group B products may not have comprehensive competency role training. Annual recertification training is applicable if new release training is required.

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 and any prerequisites.

How to get started

Sage authorized business partner

Whether you're new to the Sage partner program or are an existing partner interested in additional Sage products, contact us at NewPartner@sage.com or visit: [Sage.com](https://www.sage.com) and select the Partners tab.

Certified consultant

To register for a new Sage product line competency role, visit the certification area on [SageU.com](https://www.sage.com/sageu) to get started, or email us at 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.

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 recertification training on Sage University for annual competency recertification, when required
- Access to select noncertification courses on Sage University at no charge
- Access to specific online training libraries for their certified product on Sage University at no charge (no-charge product training libraries may not be available for some product lines)
- Access to Sage technical support for achieved competency role support
- CPE credits for approved courses and conference workshops
- Sage certified consultant logo

Program requirements

- Abide by program agreement and requirements as outlined in this document and the Sage Channel Partner Agreement.
- Successfully complete competency role training and achievement of accompanying assessment, if provided, with a score of 80%+.
 - Competency roles with prerequisite certifications must be completed by the same consultant.
- Certified consultants must complete annual renewal of competency role recertification and testing, when required.

Program fees

Sage business partner authorization fees

An initial enrollment fee and an annual authorization renewal fee are 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	Enrolment fee	Renewal fee
Sage ERP Solutions	Sage 100 ERP (includes Sage 100 Standard Online*)	\$3,000	\$1,000
	Sage 300 ERP (includes Sage 300 Online* and Sage CRM for Sage 300)	\$3,000	\$1,000
	Sage 300 Online (Only)	Waived	\$350
	Sage 500 ERP	\$3,000	\$1,000
	Sage ERP X3	\$3,000	\$1,000
Sage CRM	Sage CRM (includes SageCRM.com)	\$3,000	\$1,000
Sage Fixed Assets	Sage Fixed Assets	\$3,000	\$1,000
Sage Employer Solutions	Sage HRMS	\$3,000	\$1,000
Sage Value Solutions	Sage BusinessWorks	\$3,000	\$500
	Sage BusinessVision	\$3,000	\$500

*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 300 ERP (primary product line), an additional competency role may be required to complete certification for Sage 300 Online (companion product).

Product group	Primary product line	Companion product
Sage ERP	Sage 100 Standard ERP	Sage 100 Standard ERP Online
	Sage 300 ERP	Sage 300 Online
Sage CRM Solutions	Sage CRM	SageCRM.com

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 consultant product line renewal fees	Renewal fee discount for each product line renewal fee	6-10 fees = 20% discount 11+ fees = 30% discount

Sage certified consultant fees

New product line competency roles

Certified consultants pay an initial enrollment fee for each required product line competency role. This fee provides the consultant with:

- Access to Sage University for defined learning roles.
- All courses in the competency role, initial assessment, and a second assessment attempt, if necessary.
- First year* entitlement of five cases to contact Sage support for questions related to achieved competency.
- Access to select noncertification courses on Sage University.

*Certification year December 1 through November 30.

Fees

- Initial competency role fee—including assessment \$1,000 per role
 - **Note:** Sage BusinessWorks, Sage BusinessVision, and Sage 300 Online \$500 per role
 - **Note:** Sage Intelligence Financial Reporting certification (Sage 300 Online partner only) \$250
- Second assessment attempt if below minimum required score of 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.

**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. Support case entitlement is not included with this option.

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 recertification 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
- One Business Partner Authorization account to be used for demo purposes
 - Includes two (2) Sage 300 Online users

Note: Sage may introduce new product line competency roles during the renewal year and require partners and CCs 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.SageU.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 recertification training*	n/c
Access to select Sage University libraries or courses	n/c

*Renewal classroom or online instructor-led classroom recertification; 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. For a listing of Group A Sage product lines, refer to the product line table on page 5.

Group B Sage product lines include:

- Sage BusinessVision
- Sage BusinessWorks.

Note: Product lines in group B are subject to change.

Product support case entitlement

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 in the following section (page 9)
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 is defined by each product line's support group.

Product line	CC cases per annual CC product line fee
Sage 100 ERP and Sage 100 Online	10
Sage 300 ERP and Sage 300 Online	10
Sage 500 ERP	10
Sage ERP X3	10
Sage Fixed Assets	10
Sage CRM	10
Sage HRMS	0
Sage BusinessWorks	10
Sage BusinessVision	10

How to get started

- Create a profile on: www.SageU.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 4 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 due December 1 each year and is also paid on Sage University

The Sage certified consultant's annual renewal product line fee must be current in order to gain access to recertification training, related training on Sage University, and maintain Sage Support assistance.

- Payment notification for both programs will begin two 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. (Prices are different for Sage BusinessVision and Sage BusinessWorks.)

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 pays the initial competency role fee and completes certification requirements.

- If a consultant wants to attend a certification class and not become a CC, he pays the list price for each course (not the discounted competency role price).