

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.

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>Sage Authorized Business Partner (BP)</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"> • 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.
<p>Sage Certified Consultant (CC)</p>	<p>Receive support entitlement, access to recertification training, assessments, and select complimentary courses on Sage University.</p>	<ul style="list-style-type: none"> • Individual and Independent CC's become Sage certified consultants after completing one or more product line Competency Roles. • Achieve annual re-certifications as provided by the product line. <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.

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 or visit 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 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. 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 11+ CC's = 30% discount
Sage Select*	Partners who exclusively sell Sage products	1 Free CC 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.

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.
- 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)*



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