

# Sage Software

## Earn 5% With the Mid-Market Customer Referral Program



### Refer a Client and You Can Get Paid!

The most successful sales leads come from satisfied customers. Nothing compares to the credibility and insight that Sage Software customers can provide when discussing business successes with their peers. With this idea in mind, Sage Software is excited to offer compensation for your referral efforts. With the Mid-Market Customer Referral Program, you can register names of other businesses that may be looking for a new software solution. And when your referrals result in closing new sales, you get paid!

All Sage Software customers are eligible to participate, regardless of the Sage Software product you own. Once the sale closes, your bonus comes to you in the form of a referral fee check. The check is your reward for referring new opportunity prospects to Sage Software.

Under the program, you'll be paid a referral fee equal to 5% of the actual sale price of the software, which is net of any promotions or discounts (excludes any maintenance and support plans, services, training, and other related offerings). The referral must be made prior to the prospect contacting Sage Software through existing corporate marketing or partner marketing and referral efforts, and they cannot be listed as an existing lead in our database.

The check will be mailed within 90 days after the sale closes, as long as the order has been paid in full. The 90-day grace period ensures that the referred customer is satisfied with the software, and gives sufficient time to make the full payment. The referral fee will be paid by check from the finance department of Sage Software, giving you, the referring customer, the freedom to use the money wherever you see fit. You can pass it on to the employee who referred the prospect, donate it to a charity, deposit it in a bank account, or spend it as you deem appropriate.

**Note:** Sage Software reserves the right to modify the terms of the Sage Software Mid-Market Customer Referral Program without notice in the interest of responding to market challenges and opportunities. Notification will be given in a timely manner of any changes to the terms and conditions of the program. Sage Software products must be purchased within 12 months of the referral date for you to qualify for the referral fee. Please note that Sage Timberline Office, Sage Accpac, Sage Pro, Sage FAS, and Sage Abra products are not always ordered and processed by the Accounting Solutions business unit of Sage Software. To properly track and process your referral payment for these products, referring customers must fill out and submit the Payment Request Form.

### How Customers Can Get Started

When you identify a prospect for any Sage Software Mid-Market product, please choose one of the following easy options to register the opportunity with Sage Software.

**Call 866-675-LEAD (5323), or complete the Lead Referral Form and fax it to 949-753-1580.**

Qualifying Sage Software Mid-Market products include: Sage MAS 90, Sage MAS 200, and Sage MAS 500 ERP; Sage BusinessWorks Accounting, Sage PFW ERP (formerly Platinum® for Windows by Best and BatchMasterPFW™), Sage Abra HRMS, Sage FAS Fixed Assets, Sage Active Planner, Sage TimeSheet, Sage MIP Fund Accounting, Sage Fundraising, Sage Pro ERP, Sage Accpac ERP, Sage BusinessVision Accounting, Sage CRM SalesLogix, Sage Timberline Office, and Sage Carpe Diem software applications.

- **Once Sage Software qualifies and accepts the lead, they will refer the prospect to the appropriate local certified business partner to help present the recommended Sage Software product.**
- Sage Software will review our database on a monthly basis and process referral payments for any opportunities that were registered and closed under this program. To check the status of a referral or payment, please call 866-675-LEAD (5323).
- Upon verification of the order, a check will be mailed within 90 days for 5% of the product selling price (net of Sage Software promotion).

*The most successful sales leads come from satisfied customers.*

# Customer Referral Program

## Lead Referral Form

Please complete this form and fax it to  
**ATTN: Sage Software Lead Development Department at 949-753-1580,**  
**or call us at 866-675-LEAD (5323).**

### Referring Customer Information

Account Number: \_\_\_\_\_  
Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_  
Address \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Prospect/Client Information

Company Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
E-mail: \_\_\_\_\_

### Current Software being used:

Accounting: \_\_\_\_\_ Fixed Assets: \_\_\_\_\_  
CRM: \_\_\_\_\_ Budgeting and Planning: \_\_\_\_\_  
HR and Payroll: \_\_\_\_\_ Nonprofit/Government: \_\_\_\_\_  
Construction and Real Estate: \_\_\_\_\_ Process Manufacturing: \_\_\_\_\_

### New System Evaluation Information – Sage Software products of interest:

- |                                       |   |   |   |
|---------------------------------------|---|---|---|
| <input type="checkbox"/> Sage MAS 90  | <input type="checkbox"/> Sage Pro               | <input type="checkbox"/> Sage MIP Fund Accounting | <input type="checkbox"/> Sage FAS       |
| <input type="checkbox"/> Sage MAS 200 | <input type="checkbox"/> Sage Timberline Office | <input type="checkbox"/> Sage Fundraising         | <input type="checkbox"/> Sage Timesheet |
| <input type="checkbox"/> Sage MAS 500 | <input type="checkbox"/> Sage CRM SalesLogix    | <input type="checkbox"/> Sage Abra                |   |
| <input type="checkbox"/> Sage PFW     | <input type="checkbox"/> Sage BusinessVision    | <input type="checkbox"/> Sage Active Planner      |   |
| <input type="checkbox"/> Sage Accpac  | <input type="checkbox"/> Sage BusinessWorks     | <input type="checkbox"/> Sage Carpe Diem          |   |

### Optional Information:

What is the current operating system? \_\_\_\_\_ Is SQL Server the preferred database? \_\_\_\_\_  
What is the budget for software? \_\_\_\_\_ Annual revenue: \_\_\_\_\_  
Timeframe: \_\_\_\_\_ Industry: \_\_\_\_\_  
No. of employees: \_\_\_\_\_ Number of software users: \_\_\_\_\_  
Name(s) of decision maker(s): \_\_\_\_\_ Title: \_\_\_\_\_  
Other system integrations in place today? \_\_\_\_\_  
Other systems being evaluated: \_\_\_\_\_  
Top reasons for replacing current system (critical business issues): \_\_\_\_\_

**Note:** The client cannot be a prospect with whom Sage Software is already working.

**sage**  
software  
Your business in mind.

# Customer Referral Program

## Lead Referral Payment Request Form

**When your referral lead closes, please complete this form and send it to  
Sage Software sales department at: [leadreferral@sage.com](mailto:leadreferral@sage.com)  
Or fax it to 800-213-7383**

Sage Software will review our database on a monthly basis and process payments for any opportunities that were registered and closed under this program. However, you can also submit this Lead Referral Payment Request Form by fax or e-mail (see above) when your referral purchases the product. Please note that Sage Timberline Office, Sage Accpac, Sage Pro, Sage FAS, and Sage Abra products are not always ordered and processed by the Accounting Solutions business unit of Sage Software.

To properly track and process your referral payment for these products, referring customers must fill out and submit this Payment Request Form. To check the status of a payment, please call **866-675-LEAD** (5323) or fax to **800-213-7383**.

### Referring Customer Information

Account Number: \_\_\_\_\_  
Company Name: \_\_\_\_\_ Contact Name: \_\_\_\_\_  
Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Customer Referral Information

Date Referred to Sage Software: \_\_\_\_\_  
Company Name: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

### Select the New Sage Software Product(s) Purchased

- |                                       |   |   |   |
|---------------------------------------|---|---|---|
| <input type="checkbox"/> Sage MAS 90  | <input type="checkbox"/> Sage Pro               | <input type="checkbox"/> Sage MIP Fund Accounting | <input type="checkbox"/> Sage FAS       |
| <input type="checkbox"/> Sage MAS 200 | <input type="checkbox"/> Sage Timberline Office | <input type="checkbox"/> Sage Fundraising         | <input type="checkbox"/> Sage Timesheet |
| <input type="checkbox"/> Sage MAS 500 | <input type="checkbox"/> Sage CRM SalesLogix    | <input type="checkbox"/> Sage Abra                |   |
| <input type="checkbox"/> Sage PFW     | <input type="checkbox"/> Sage BusinessVision    | <input type="checkbox"/> Sage Active Planner      |   |
| <input type="checkbox"/> Sage Accpac  | <input type="checkbox"/> Sage BusinessWorks     | <input type="checkbox"/> Sage Carpe Diem          |   |

Date of new purchase (approximate): \_\_\_\_\_

Sage Software Customer Lead Referral Program payment will be paid by check within 90 days of receipt and verification.

Referring Customer's Authorized Signature: \_\_\_\_\_  
Date: \_\_\_\_\_  
Print Name: \_\_\_\_\_ Title: \_\_\_\_\_



**sage**  
software  
*Your business in mind.*