Sage ERP X3 Certified Solution

Program details and application

November 2014

# Introduction

Welcome to the Sage Certified Solution Program! Sage is committed to the success of our solution provider community. The Certified Solution Program was established to provide solution providers with:

* Credibility with Sage customers that their solution was reviewed by Sage and the integration reliably works with Sage products.
* An opportunity to develop a closer relationship with Sage and for Sage to promote and sell their solutions with Sage products.
* Greater visibility to Sage customers.

The Sage Certified Solution Program provides customers with a rich ecosystem of solutions to meet their unique business challenges. We welcome applications to the program for multiple solutions of the same type to provide our customers various options to address their broad range of needs, price points, and market segments.

# Program benefits

The Sage Certified Solution Program offers significant benefits to solution providers, including:

* Greater customer and prospect confidence that your solution works with Sage products.
* Inclusion of the Certified Solution on the Sage price list.
* Direct customer billing by Sage for Certified Solution licensing, monthly subscription fees, and maintenance and support renewals.
* Visibility and promotion of Certified Solutions to Sage channel partners, customers, and prospects.
* Use of the “Sage Certified Solution” logo.
* Participation in Sage Summit, our annual channel partner and customer conference.
* Eligibility to participate in Sage customer road shows and customer events.

# Application process and requirements

There are five steps to achieving Sage ERP X3 Certified Solution status for a solution.

**Solution providers must have an active Sage Certified Development Professional registered with Sage and have a current Sage Development Care Plan to be eligible to join the Sage Certified Solution program.**

## Staff at least one Sage ERP X3 Certified Development Professional

Sage Certified Development Professionals are individuals who have been trained and passed the necessary assessments needed to build quality integrations to the Sage Data Cloud or individual Sage products. A solution provider must:

* Have at least one Sage Certified Development Professional on staff to purchase a Sage Development Care plan.
* Have at least one Sage Certified Development Professional on staff when applying for Sage Certified Solution status for a solution. The solution provider must maintain at least one Sage Certified Development Professional on staff to maintain the solution’s certification.

**Solution providers may utilize the assistance of third party developers, but must still maintain at least one Sage Certified Development Professional on the solution provider’s staff.**

## Purchase a Sage ERP X3 Development Care Plan

A solution provider must purchase an annual Sage ERP X3 Development Care Plan to access the necessary development resources needed to build its integration.

Sage offers two levels of Development Care Plans:

|  |  |  |
| --- | --- | --- |
| **Plan level** | **Cost** | **Includes** |
| Standard | $2,000 per year | Includes access to Sage ERP X3 software and keys.  Includes no developer support cases. |
| Advanced | $5,000 per year | Includes access to Sage ERP X3 software and keys.  Includes 20 developer support cases. |

To purchase one of these Development Care Plans, a solution provider must already have one Sage Certified Development Professional on staff. Sage will verify eligibility with each annual renewal of the Sage Development Care plan.

**A solution provider may purchase a Sage Development Care Plan and use the plan’s resources to build non-certified solution integrations. Upon request, the solution provider must provide a complete list of customers (along with customer contact information) using the non-certified solution in conjunction with Sage products.**

**Solution providers will not receive Sage ERP X3 keys until they have registered a Sage ERP X3 Certified Development Professional and that individual has successfully completed and passed Sage ERP X3 developer training curricula.**

## Submit the Sage Certified Solution Program application and fees

When a solution provider completes the integration to a Sage product, it must submit the Sage Certified Solution Program application and program fee to Sage. A solution provider must submit a unique application for each solution it wants Sage to consider for Certified Solution status. See “Application ” on page 6 for additional information about the application.

Fees for the program are $8,500 USD annually for each Certified Solution. Sage will waive the applicable renewal fee for a Certified Solution in subsequent years if the revenue share received by Sage with respect to such Certified Solution exceeds $8,500 over the previous 12 months.

The program fees will cover certification costs for most proposed Certified Solutions integrating with Sage products; however, additional fees may apply at the sole discretion of the Sage certification testing provider.

PROGRAM FEES ARE **NONREFUNDABLE** AFTER SAGE NOTIFIES THE SOLUTION PROVIDER THAT ITS APPLICATION FOR THE SAGE CERTIFIED SOLUTION PROGRAM HAS BEEN ACCEPTED.

## Submit the solution for certification

After receiving the application and program fee, Sage will work with the solution provider to submit their solution for integration certification testing. Sage will certify all proposed Certified Solutions in accordance with the certification requirements set forth in the *Sage Certified Solution Requirements and testing process* *overview for Sage ERP X3* document. Please see this document for more details about the certification process and requirements.

**Sage may engage the services of a third-party vendor to test and review the solution provider’s integration to a Sage solution.**

**If a solution initially fails the certification process, the solution provider has 60 days to re-submit their solution for testing at no additional charge. After 60 days, the solution provider may need to pay additional fees for subsequent testing of their solution.**

## Enter into a Sage Certified Solution Distribution Agreement

The Sage Certified Solution agreement provides Sage with the exclusive rights to sell and distribute the Certified Solution. The solution provider receives a revenue share for each sale of their Certified Solution. The revenue share for Certified Solutions sales are as follows:

* 55% revenue to the solution provider
* 25% revenue to the channel partner for the customer
* 20% revenue to Sage

Sage will work with the solution provider to:

* Obtain product descriptions and suggested prices for the Certified Solution.
* Add the Certified Solution to the Sage price list and Sage directory.
* Define an order fulfillment process to simplify the customer onboarding process.

Additionally, solution providers receive a Sage Certified Solution Logo to display in their marketing materials.

# Application steps

The following provides an overview of the application for the Sage Certified Solution program and the process to submit it. Sage will evaluate and consider each application to determine product quality and the market needs served by each solution. Sage may approve or reject an application at its sole discretion.

## Complete the application

To participate in the Sage Certified Solution Program, a solution provider must complete the attached application (see page 10 of this document). To apply, the solution provider must supply contact information, information about its product, company information, references, and use cases for its product.

The following provides specific information about the application:

### Section 2: Company contact information

Please provide your company contact information.

### Section 3: Solution information

Please provide us with information about the integration you are submitting for Sage Certified Solution status. This information will give us some basic background information about your solution.

### Section 4: Solution detail and value proposition

Please provide us with additional detail about the technologies used to build the solution and help us better understand how your product helps Sage customers overcome business challenges.

### Section 5: Additional company background

Please provide us with some additional detail about your company and any current relationship you have with Sage.

### Section 6: Partner/business references

To apply for the Sage Certified Solution Program, a solution provider must provide three (3) channel partner or professional references. These are individuals who have sold and/or implemented your solution for customers. While current Sage channel partner and professional references are preferable, you may include non-Sage related references if necessary. Sage may contact these references to discuss their experience working with you and your product.

### Section 7: Customer references

To apply for the Sage Certified Solution Program, a solution provider must provide three (3) current customer references. These are individuals who have purchased your product in the past 12 months and use it in their business. While current Sage customers are preferable, you may include non-Sage related customer references if necessary. Sage may contact these references to discuss their experience using your product.

### Section 8: Provide details about your Sage Certified Development Professionals

To apply for the Sage Certified Solution Program, a solution provider must have at least one Sage Certified Development Professional on staff. Please provide the contact details for your Certified Development Professionals.

### Section 9: Primary contacts

Please provide the primary contacts for the listed functional areas.

### Section 10: Requested product certifications

Please select the Sage product(s) for which you want to certify your solution.

Please note that each product selected is a separate annual fee and your Certified Development Professionals must be certified for the selected Sage products.

### Section 11: Define payment options

Please indicate how you want to pay any applicable Sage Certified Solution Program fees. A solution provider applying for the Sage Certified Solution Program must submit program fees in the amount of $8,500 USD annually for each product selected in section 10 of the application. For avoidance of doubt, a developer who wishes to obtain Sage Certified Solution status for three Sage on-premises products would need to submit the program fee for three products ($8,500 x 3 products = $25,500 annually).

These fees cover the costs of the certification testing process and program support.

* For applicants who want to be invoiced for their program fees, please check “Please invoice me for my Sage Certified Solution Program fees” on your application. When Sage processes your application, we will send you an invoice for which you can submit payment.
* For applicants who want to pay their program fees by credit card, please check “Please contact me so I can pay my Sage Certified Solution Program fees by credit card” on your application. When Sage processes your application, our team will contact you for your credit card information so you can make expedited payment.

Please select only one check box in this section.

PROGRAM FEES ARE **NONREFUNDABLE** AFTER SAGE NOTIFIES THE ISV THAT HIS/HER APPLICATION FOR THE SAGE CERTIFIED SOLUTION PROGRAM HAS BEEN ACCEPTED.

### Section 12: Sign the application

Please ensure that you print your name and job title, then sign and date the application before submitting it to Sage.

## Define use cases

The applicant must also include one or more use cases along with its *Sage Certified Solution application*. Sage will review these use cases to better understand the market and customer challenges for which the proposed Certified Solution solves. At a minimum, these use cases should include the market served, typical customer size, the end user’s business role, the conditions in which a customer would use the solution, a description of how the customer then uses the solution, and the end result that the customer will experience. For each unique feature of the solution, there should be at least one use case. Where necessary, Sage may ask the Solution Provider to provide more use cases to better understand the solution.

## Submit the application, use cases, and fees

Applicants can submit their application (in their entirety)and use cases using one of the following methods:

* **Send the completed application and use cases by mail to:**

Sage  
Attn: ISV Partner Programs  
6561 Irvine Center Drive  
Irvine, CA 98618

* **Scan the completed application and use cases and attach it to an email message to:**
  + [stephen.sklarew@sage.com](mailto:stephen.sklarew@sage.com) for Sage 100 ERP, Sage 100 Contractor, Sage 300 ERP, Sage 300 Construction and Real Estate, and Sage CRM
  + [chris.corder@sage.com](mailto:chris.corder@sage.com) for Sage ERP X3 and Sage 500

**Note:** If you selected products for more than one contact person, please email your application to both contacts.

# Additional terms and conditions

The following outlines some additional terms and conditions for the Sage Certified Solution program.

## Product support

A solution provider must provide customer technical support for the Certified Solution that meets or exceeds the requirements provided in the *Sage Certified Solution agreement*.

If a solution provider fails to provide the requisite support for a Certified Solution, Sage may in its sole discretion, suspend or terminate such product’s “Sage Certified Solution” status.

Additionally, the solution provider will:

* Work in good faith with Sage personnel on any issue that affects our mutual products.
* Provide Sage with telephone support for any issues/defects encountered by Sage in the process of supporting our customers.
* Designate a point of contact within its organization to work with Sage on any technical support issues.

Each solution provider will publish its support policy on its website, including contact information (for example, support phone number and email address), days and hours of operation, and typical response time for customers inside and outside of North America. The solution provider will provide customers and Sage with a link to such policy.

## Product updates

Each solution provider must develop its Certified Solution to maintain compatibility with the latest version of the Sage application to which it integrates in accordance with the requirements set forth in the *Sage Certified Solution agreement*. Additionally, the solution provider will:

* Establish the infrastructure and methodology necessary to promptly notify customers and distribute Certified Solution program fixes and updates.
* Distribute all program fixes and updates to customers in accordance with its published support policy and the requirements set forth in the *Sage Certified Solution agreement*.

Solution providers will also make reasonable efforts to work with other solution providers to facilitate integration with between their respective solutions when requested by customers and channel partners.

## Customer satisfaction

Sage is committed to providing our customers with a rich ecosystem of quality solutions to solve their business challenges. To ensure that certified solutions maintain high levels of customer satisfaction, Sage will:

* Monitor customer feedback and product ratings for certified solutions. If a certified solution receives poor customer feedback/product ratings, Sage may request that the solution provider take corrective action to address the reported issues. If a solution provider fails to take corrective action that improves product ratings/feedback, Sage may in its sole discretion, suspend or terminate such product’s “Sage Certified Solution” status.
* Investigate customer and channel partner complaints; significant unresolved product usage, customer support, or customer service complaints regarding a certified solution may result in Sage, in its sole discretion, suspending or terminating such product’s “Sage Certified Solution” status.
* Sage may perform annual net promoter score (NPS) surveys for certified solutions. Sage may in its sole discretion, suspend or terminate the certified solution status of a certified solution with poor/negative net promoter scores.

At the time of renewal, solution providers are required to submit references from new customers who purchased their certified solution in the previous 12 months to ensure ongoing product and customer satisfaction.

# Questions

If you have any questions about the program or application process, please contact:

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| --- | --- |
| **For Sage 100 ERP, Sage 100 Contractor, Sage 300 ERP, Sage 300 Construction and Real Estate, and Sage CRM:** | **For Sage ERP X3 and Sage 500 ERP:** |
| Stephen Sklarew VP Product Management Sage 15195 NW Greenbriar Pkwy  Beaverton, OR 97006  [stephen.sklarew@sage.com](mailto:stephen.sklarew@sage.com)  **Direct:** 503-439-5023 | Chris Corder Sr. Product Manager Sage 6561 Irvine Center Drive Irvine, CA 98618  [chris.corder@sage.com](mailto:chris.corder@sage.com)  **Direct:** 949-864-7159 **Toll-free:** 800-854-3415 x347159 |

Submission of this form confirms the request of the undersigned applicant to have their software solution considered for the Sage Certified Solution Program. In addition to this application, please review the *Sage Certified Development Professional and Certified Solution Programs overview* document and the *Sage Certified Solution agreement* for additional terms and conditions.

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **1. Program costs** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Certified Solution program | | | | | | | $8,500 annual fee[[1]](#footnote-2) | | | | | | | | | | | | | | | | | | | | |
| **2. Company contact information** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Company name | | | | | Enter company name. | | | | | | | | | | | | | | | | | | | | | | |
| Street address | | | | | Enter street address. | | | | | | | | | | | | | | | | | | | | | | |
| City | | | | | Enter city. | | | | | | | | | | | | State | | | | Enter state. | | | | ZIP | |  |
| Contact name | | | | | Enter contact name. | | | | | | | | | | | | Title | | | | | | Enter contact title. | | | | |
| Mobile phone | | | | | Enter mobile number. | | | | | | | | | | | | Work phone | | | | | | Enter work number. | | | | |
| Email address | | | | | Enter email address. | | | | | | | | | | | | | | | | | | | | | | |
| Sage partner ID | | | | | Enter your partner ID if known. | | | | | | | | | | | | | | | | | | | | | | |
| **3. Solution information** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New/proposed solution | | | | | | | | | | | | | | | | Existing solution | | | | | | | | | | | |
| Solution name | | | | | Enter solution name. | | | | | | | | | | | | | | | | | | | | | | |
| Solution description | | | | | Enter solution description. | | | | | | | | | | | | | | | | | | | | | | |
| Solution deployment | | | | | Select deployment type | | | | | | | | | Solution license type | | | | | | | | | | Select license type | | | |
| Number of customers using this solution *(if existing)*? | | | | | | | | Enter #. | | | | | Number of customers using this solution with other products? | | | | | | | | | | | | | Enter #. | |
| Vertical solution  *Targets specific market segments* | | | | | | | | | | | | | | | *Broadly applicable, regardless of market*  *Horizontal solution* | | | | | | | | | | | | |
| *External solution or service requiring a connector*  *Connected application* | | | | | | | | | | | | | | | *Functional extension or patch*  *Integrated solution* | | | | | | | | | | | | |
| **4. Solution detail and value proposition** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Describe the technologies used by the proposed solution: | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| Describe functional gaps in the Sage product that are addressed by the proposed solution: | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| Describe potential new opportunities or markets that the proposed solution enables: | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| List alternative solutions considered to be competitors: | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| Additional detail or explanation of your value proposition: | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| **5. Additional company background** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total employees | | | | | | Enter #. | | | | | | Annual revenue *(3-yr. average)* | | | | | | | | | | | Enter #. | | | | |
| Number in R&D | | | | | | Enter #. | | | | | | Years in business | | | | | | | | | | | Enter #. | | | | |
| Number in support, support locations & support hours | | | | | | Enter #, locations and hours. | | | | | | Total number of customers | | | | | | | | | | | Enter #. | | | | |
| Current Sage ERP X3 Certifications if applicable: | | | |  | | | | | | | |  | | | | | | | | | | |  | | | | |
| Geographical coverage | | | |  | | | | | | | |  | | | | | | | | | | | Other: Enter text. | | | | |
| List other solutions developed by your company | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| List other companies with which your company partners | | | | | | | | Click here to enter text. | | | | | | | | | | | | | | | | | | | |
| Existing developer relationships with other Sage products? | | Sage ERP X3  Sage 500 ERP  Sage 300 ERP  Sage 300 Construction  Sage 100 Contractor  Sage 100 ERP  Sage CRM | | | | | | | | | Relationship type?  Relationship type?  Relationship type?  Relationship type?  Relationship type?  Relationship type?  Relationship type? | | | | | | | | Choose a type.  Choose a type.  Choose a type.  Choose a type.  Choose a type.  Choose a type.  Choose a type. | | | | | | | | |
| **6. Partner/business references** *(please provide company name, contact, phone, and email address)* | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **7. Customer references** *(please provide company name, contact, phone, and email address)* | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3. | Enter company name, contact, phone, and email address. | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **8. Sage Certified Development professionals** (please enter the names of the Sage Certified Development professionals who built your integration) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Sage Certified Development professional 1 (required)** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Company name | | | | | Enter company name. | | | | | | | | | | | | | | | | | | | | | | |
| Street address | | | | | Enter street address. | | | | | | | | | | | | | | | | | | | | | | |
| City | | | | | Enter city. | | | | | | | | | | | | State | | | | Enter state. | | | | ZIP | | Enter ZIP. |
| Contact name | | | | | Enter contact name. | | | | | | | | | | | | Title | | | | | | Enter contact title. | | | | |
| Mobile phone | | | | | Enter mobile number. | | | | | | | | | | | | Work phone | | | | | | Enter work number. | | | | |
| Email address | | | | | Enter email address. | | | | | | | | | | | | | | | | | | | | | | |
| Sage Certified Developer ID | | | | | | | | | Enter Certified Developer ID | | | | | | | | | | | | | | | | | | |
| **Sage Certified Development professional 2 (if applicable)** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Company name | | | | | | | | | Enter company name. | | | | | | | | | | | | | | | | | | |
| Street address | | | | | | | | | Enter street address. | | | | | | | | | | | | | | | | | | |
| City | | | | | | | | | Enter city. | | | | | | | | State | | | | Enter state. | | | | ZIP | | Enter zip. |
| Contact name | | | | | | | | | Enter contact name. | | | | | | | | Title | | | | | | Enter contact title. | | | | |
| Mobile phone | | | | | | | | | Enter mobile number. | | | | | | | | Work phone | | | | | | Enter work number. | | | | |
| Email address | | | | | | | | | Enter email address. | | | | | | | | | | | | | | | | | | |
| Sage Certified Developer ID | | | | | | | | | Enter Certified Developer ID | | | | | | | | | | | | | | | | | | |
| **9. Primary contacts** *(please provide contact name, phone number, and email address)* | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Finance | | | Enter name, phone number, and email address. | | | | | | | | | | | | | | | | | | | | | | | | |
| Sales | | | Enter name, phone number, and email address. | | | | | | | | | | | | | | | | | | | | | | | | |
| Technical support | | | Enter name, phone number, and email address. | | | | | | | | | | | | | | | | | | | | | | | | |
| Customer support | | | Enter name, phone number, and email address. | | | | | | | | | | | | | | | | | | | | | | | | |
| Marketing | | | Enter name, phone number and email address. | | | | | | | | | | | | | | | | | | | | | | | | |
| **10. Product certifications** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Which Sage products do you want to certify your solution with? | | | | | | | | | | Sage ERP X3 | | | | | | | | | |  | | | | | | | |
| **11. Select payment method** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please invoice me for my Sage Certified Solution program fees | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Please contact me so I can pay my Sage Certified Solution program fees by credit card | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **12. Signature** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Print name: | | |  | | | | | | | | | | | | | | | Title: | | | |  | | | | | |
| Signature: | | |  | | | | | | | | | | | | | | | Date: | | | |  | | | | | |

Signing this application indicates that you agree to submit your solution for consideration as a Sage Certified Solution.

To submit a solution for consideration to the Sage Certified Solution Program, a solution provider must submit one or more use cases as required by Sage with its application. Sage will review these use cases to better understand the market and customer challenges that the solution addresses. Please enter your use cases in the fields below. If you need to submit additional uses cases, please do so in a separate document and return with your application.

**Note:** See “Define use cases” on page 8 for more information about use cases requirements.

|  |  |
| --- | --- |
| **Use Case #1** | |
| Use case name: | Click here to enter text. |
| Summary/description: | Click here to enter text. |
| User roles/actors: | Click here to enter text. |
| Preconditions: | Click here to enter text. |
| Process/event flow: | Click here to enter text. |
| Alternate process/events: | Click here to enter text. |
| Post conditions | Click here to enter text. |

|  |  |
| --- | --- |
| **Use Case #2** | |
| Use case name: | Click here to enter text. |
| Summary/description: | Click here to enter text. |
| User roles/actors: | Click here to enter text. |
| Preconditions: | Click here to enter text. |
| Process/event flow: | Click here to enter text. |
| Alternate process/events: | Click here to enter text. |
| Post conditions | Click here to enter text. |

|  |  |
| --- | --- |
| **Use Case #3** | |
| Use case name: | Click here to enter text. |
| Summary/description: | Click here to enter text. |
| User roles/actors: | Click here to enter text. |
| Preconditions: | Click here to enter text. |
| Process/event flow: | Click here to enter text. |
| Alternate process/events: | Click here to enter text. |
| Post conditions | Click here to enter text. |

1. Additional fees for certification testing may apply at the sole discretion of our testing provider for large, complex, or code level integrations. Solution provider’s employee must complete Certified Development Professional training within 180 days of Sage accepting this application. [↑](#footnote-ref-2)