

Sage CRM Solutions | Customer Reference Program

Showcase Your Company's Success While Earning Discounts

The Sage CRM Solutions Customer Reference Program provides an opportunity for corporate customers to showcase their success with Sage ACT! and Sage SalesLogix. Joining is simple and the program is designed to work around your schedule. You specify which activities you wish to take part in and how often you want to be contacted, and we will adhere to those preferences.

Reference activities include participation in calls with prospective Sage customers, involvement in media and industry analyst interviews and press releases and possibly being showcased as a Sage customer success story! For each activity you complete, your company will earn points toward discounts on purchases.

How It Works

The program provides many flexible opportunities for your company to gain visibility and recognition by sharing your successes. By simply joining the program and submitting your company's logo, you will earn 100 points.

I. Select Your Participation Opportunities

Sales Reference with Prospect

As a Sales Reference, you will participate in a call with a prospective Sage customer. *Estimated time commitment: 5-45 minutes. Earns 100 points.*

Public Relations Reference with Media or Industry Analyst

As a PR Reference, you will participate in an interview with an industry analyst or media reporter. These interviews usually result in published research or articles. Serving as a PR Reference can also include award submissions. *Estimated time commitment: 15-45 minutes, depending on the interviewer. Earns 100 points.*

Press Release

For a Press Release, you will participate in a brief interview with a Sage public relations professional and will have an opportunity to review the final press release prior to media distribution and website publication. *Estimated time commitment: 45 minutes – 1 hour. Earns 100 points.*

Success Story

For a Success Story, you will have an interview with a writer, then review and approve the final Success Story prior to its publication. *Estimated time commitment: 1-2 hours. Earns 200 points.*

Video Testimonial

For a Video Testimonial, you will participate in an on-site interview and video production. You will have the opportunity to review and approve the final Video Testimonial prior to publication. *Estimated time commitment: 1-3 hours. Earns 300 points.*

Speaking Engagements

For a Speaking Engagement, such as a Webcast or conference, you will prepare and give a presentation about how your chosen product addresses your business challenges and the results you achieved. *Estimated time commitment: 3 hours. Travel optional. Earns 300 points.*

II. Select Your Contact Preferences

You set your own contact preferences, which determine how often we will contact you in a given calendar year. Your preferences are respected, closely monitored, and tracked in the Customer Reference Program database by our reference program manager.

Reap Rewards

In exchange for participation, you will earn points for each reference activity you complete. If you earn a total of 100 or more points, you receive a 5% discount; 200 or more points, a 10% discount or 50% off a Sage Summit Pass; or 400 or more points, a 15% discount or one Sage Summit customer conference pass.

You may apply your percentage discount toward one of the following: subscription costs, licensing costs, Sage ACT! Platinum Care, support plans (Sage ACT! customers only), or maintenance and support renewals (Sage SalesLogix customers only).

 To join the Sage CRM Solutions Customer Reference Program, email CustomerReferenceProgram.na@sage.com.

Sage CRM Solutions | Customer Reference Program

Customer Profile and Agreement Form

Customer Contact Information

Company Profile

<input type="text" value="State"/>	<input type="text" value="Country"/>	<input type="text" value="Zip code"/>
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<input type="text" value="# of employees"/>	<input type="text" value="# of locations"/>
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Business Partner Contact Information

Notify partner prior to use

Product Usage Profile

Products used

- | | |
|---|----------------|
| <input type="checkbox"/> Sage ACT! Pro | Version: _____ |
| <input type="checkbox"/> Sage ACT! Premium
(Access via Windows® and Web) | Version: _____ |
| <input type="checkbox"/> Sage SalesLogix LAN Client | Version: _____ |
| <input type="checkbox"/> Sage SalesLogix Cloud | Version: _____ |
| <input type="checkbox"/> Sage SalesLogix Web Client | Version: _____ |
| <input type="checkbox"/> Other: _____ | |

<input type="text" value="Customer since"/>	<input type="text" value="# of users"/>
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Add-on solutions used

- Sage E-marketing for ACT!
- Sage Business Info Services for ACT!
- ACT! Mobile Live
- Sage SalesLogix E-marketing
- Sage SalesLogix Mobile
- Sage SalesLogix Visual Analyzer
- Sage SalesLogix ERP Link
- Other: _____

Migrated from

- GoldMine®
- Microsoft® CRM
- Microsoft Outlook® or Excel®
- Salesforce
- SugarCRM
- Other: _____

Agreement to Participate

Customer, _____, confirms that an authorized representative of Customer has read this Sage CRM Solutions Customer Reference Program Agreement to Participate (“Agreement”) and agrees, on behalf of the Customer, to participate in the Sage CRM Solutions Customer Reference Program. This Agreement is for an initial term of one year and automatically renews for one-year periods thereafter.¹ The Sage CRM Solutions Customer Reference Program is available for Sage ACT! and Sage SalesLogix customers. **Specifically, Customer agrees to participate in the following Sage CRM Solutions Customer Reference Program activities (check all that apply):**

- Sales Reference with Prospect (100 Points)
- Success Story (200 Points)
- Public Relations with Media or Industry Analyst (100 Points)
- Video Testimonial (300 Points)
- Press Release (100 Points)
- Speaking Engagement (300 Points)

Customer expressly consents to the commercial or non-commercial use and publication by Sage of any customer’s company logo, customer quotes, press releases, success stories, recordings (if any) of speaking engagements, and video testimonials (collectively “Reference Activities”), in whole or in part, or composite, without restriction as to changes or alterations, from time to time, in conjunction with Customer’s company name or a fictitious name, made through any media for art, advertising, trade or any other purpose whatsoever. Customer understands that by execution of this Agreement, Customer is relinquishing all rights to such Reference Activities and to any future compensation for publication or use of the same. Customer also understands that Sage retains the right to publish such Reference Activities in any medium including, but not limited to, reproductions, magazines, newspapers, email, and the Internet or World Wide Web. Customer does not retain the right to view or approve such Reference Activities, or the advertising copy or printed matter that may be used in conjunction therewith or the use to which it may be applied, prior to publication by Sage.

In exchange for participating in the Sage CRM Solutions Customer Reference Program, customer will earn points² for each Reference Activity. Points are earned upon completion of a Reference Activity, whether Sage chooses to use the material or not. When a Reference Activity is completed, a corresponding number of points will be added to a customer’s point balance. If you earn a total of 100 or more points, you receive a 5% discount; 200 or more points, a 10% discount or 50% off a Sage Summit Pass; or 400 or more points, a 15% discount or one Sage Summit customer conference pass. You may apply your percentage discount toward one of the following: subscription costs, licensing costs, Sage ACT! Platinum Care, support plans (Sage ACT! customers only), or maintenance and support renewals (Sage SalesLogix customers only). This Agreement shall be governed and interpreted by the laws of the State of California.

Please select contact frequency:

- 1-2 per Month
- 1-2 per Quarter
- 1-2 per Year
- As Needed
- No Preference

Signature	Date
Printed name	Company name

Thank you for becoming a Sage CRM Solutions Customer Reference!



To join the Sage CRM Solutions Customer Reference Program, please fax this completed form to 480-444-2789 or email CustomerReferenceProgram.na@sage.com.

¹ Customer may, at any time following the initial one-year term, terminate this agreement with 30 days written notice to the Sage CRM Solutions Customer Reference Program Manager. Any point balances remaining at the time of termination will be forfeited.
² Points may be used to redeem discount immediately upon earning or may be accumulated and saved for the duration of the customer’s enrollment in the program. Accumulated points can be used for applicable percentage discount on no more than one single transaction per month. After discount is applied, point balance resets at zero; all accumulated points are recorded and tracked in the reference database by the Sage CRM Solutions Customer Reference Program Manager. A customer may not use points toward previous purchases made in order to obtain refunds or credits. Discount will be taken off of the pricing level customer qualifies for under volume pricing. The maximum discount a customer may receive is \$10,000 per year based on your program anniversary date. Only Corporate License customers are eligible to participate in the Sage CRM Solutions Customer Reference Program. Applicants must be accepted into the program by the Sage CRM Solutions Customer Reference Program Manager. Discount cannot be combined with any other discount or special offer.

