

### Why Choose When You Don't Have To?

Sage SalesLogix Cloud offers the best of both worlds—the flexibility and rapid time-to-value of a traditional CRM SaaS solution, combined with the benefits of an on-premise solution like security and control. With payment and subscription options, data ownership, greater data storage, and advanced customization, Sage SalesLogix Cloud provides a better choice for your business.

### Top Differentiators

- Full-featured, Secure, CRM
- Enterprise-class Support
- Flexible Payment Options
- Greater Storage per User
- Upgrade Control
- Integration & Customization

Below are **talking points** to use with customers and prospects that highlight the *unique* advantages of Sage SalesLogix Cloud:

- You can have **peace of mind** that your data is secure and only accessible by you—not intermingled with the data of hundreds or thousands of other companies. You own and control your data so should your business needs change and you decide to switch to an on-premise solution, you get your data back intact—in a usable, standard format. And, rest assured, Sage will take care of you so your IT department doesn't have to worry about it—from setup and backups to expert product support and 24-hour monitoring.
- You'll receive **greater storage space per user** from the start of service than other vendors provide—with favorable rates to increase capacity as your business grows and changes.
- Benefit from a **variety of flexible payment**, subscription, and license options (like concurrent licensing) that fit your business requirements and financial preferences.
- You're **in control of the CRM experience**. Change, like a software upgrade, can be disruptive—to IT, to users, and even to management. Sage SalesLogix Cloud gives you control of upgrades so you can perform them when it's right for your business.
- Built on a flexible, standards-based platform, you can **integrate your other business management solutions**, desktop applications, and Web services for increased productivity and a complete, holistic view of your customers.

## Target Opportunities

| Target Market                                | Trigger   | Sage SalesLogix Cloud Benefits  |
|--|---|---|
| New to CRM                                   | <ul style="list-style-type: none"> <li>CEO/VP Sales finds it difficult to represent and track the pipeline</li> <li>Company growth (5 to '000's of sales people)</li> </ul>       | <ul style="list-style-type: none"> <li>Grow with your needs</li> <li>Data ownership, deployment flexibility, price, TCO, usability</li> <li>Sage/Partner expertise</li> </ul>   |
| Replacement CRM                              | <ul style="list-style-type: none"> <li>Current solution: on-premise or SaaS-based solution is not meeting needs</li> <li>Disgruntled with current vendor relationship</li> </ul>  | <ul style="list-style-type: none"> <li>SalesLogix customization/sophistication</li> <li>Data ownership, deployment flexibility, price, TCO, usability</li> <li>Sage/Partner expertise</li> </ul>                                      |
| SalesLogix On-Premise Upgrades and expansion | <ul style="list-style-type: none"> <li>Want to keep Sage SalesLogix experience with SaaS benefits</li> <li>New Web client functionality</li> <li>Prefer OpEx vs. CapEx</li> </ul> | <ul style="list-style-type: none"> <li>Sage/Partner/SalesLogix familiarity</li> <li>Data ownership, deployment flexibility, BP expertise, price, TCO</li> <li>Retain investment in licenses, pay low M&amp;S + Hosting fee</li> </ul> |

## Pricing & Configuration

Please download the Sage SalesLogix Pricing Reference for North America from Partners Online.

## Customer Billing

With Sage SalesLogix Cloud, customers can enjoy the convenience of a low monthly subscription fee with flexible billing terms. Customers can choose to be billed monthly, quarterly, or annually depending on their preferences, and they can choose to have their credit card billed directly, or be invoiced.

## Service Operations

The Sage service operations team will provide enterprise-class support including:

- Provisioning/setup of systems
- Backups
- Hosted infrastructure support
- Monitoring
- Windows and database maintenance

## Partner Compensation

In the first year, partners will receive 25%, 25% in the 2<sup>nd</sup> year, and 10% in the 3<sup>rd</sup> year paid out upfront each year for an entire year's worth of subscriptions—as long as they remain the reseller. Note: Partner margins will be paid on Sage SalesLogix Cloud deals beginning in Phase 1.

As an authorized reseller, partners will also receive full Tier and President's Circle credit for Sage SalesLogix Cloud customers.

## Pre-built Demo Images

Sage has created pre-built images that partners can leverage for Demos and Proofs-of-Concept.

Benefits of Using Demo Images in the Cloud:

- Time: Less time building demos, more time to focus on selling
- Cost: Pay per usage—as little as 12 cents/hour
- Collaboration: Easily share responsibilities of preparing for a demo
- Faster Performance
- No hardware investment
- Easily share demos with teammates
- Demos are automatically accessible to your customers, anywhere in the world

### Sign-up NOW!

Go to <http://tinyurl.com/slxcloud> to sign up for an Amazon EC2 Account. Send an e-mail to [tyler.crowder@sage.com](mailto:tyler.crowder@sage.com) with your 12-digit Amazon account number requesting access to the demo images.

## Phase 1: Limited Availability

Limited availability of Sage SalesLogix Cloud is targeted for spring 2010.

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|--|--|
| <p><b>Pricing</b><br/>Please refer to the <i>SalesLogix Pricing Reference – North America</i> for more detail</p>            | <p>New Customers:<br/>Named User - \$65 per user per month (Standard Edition)<br/>Concurrent User - \$100 per user per month<br/>Migrating Install Base Customers:<br/>Named User - \$35 per user per month (Standard Edition)<br/>Concurrent User - \$40 per user per month</p>   |
| <p><b>SalesLogix Edition</b><br/>Please refer to the <i>SalesLogix Pricing Reference – North America</i> for more detail</p> | <p>During Phase 1, SalesLogix Standard Edition will be available on SalesLogix Cloud. Some third party add-ons will not be available, please refer to the Pricing Reference for more detail.</p>   |
| <p><b>Billing</b></p>  | <p>Upfront, Monthly, Quarterly or Annually. Minimum of a 12-month contract; discounts available for longer contract periods. Please refer to the Pricing Reference guide for details.</p>  |
| <p><b>Customer Requirements</b></p>  | <ul style="list-style-type: none"> <li>• Minimum of 5 users</li> <li>• During Phase 1, certain add-on products and third-party products will not be available, please refer to the Pricing Reference for more information.</li> </ul>  |
| <p><b>Ideal Phase 1 Candidates</b></p>   | <p><b><u>Installed Base Customers</u></b></p> <ul style="list-style-type: none"> <li>• Currently running Sage SalesLogix v7.x Web</li> <li>• Not running Visual Analyzer or Mobile</li> <li>• Already have a corporate priority to move applications to the cloud or have expressed interest in moving to the cloud</li> <li>• Limited IT resources</li> <li>• Off-plan customers</li> </ul> <p><b><u>New Customers</u></b></p> <ul style="list-style-type: none"> <li>• Shopping for a Hosted Solution—considering Salesforce.com</li> <li>• Limited capital</li> </ul> |

|                              |  |
|------------------------------|--|
| <b>Sign-up Process</b>       | Use the available Sage SalesLogix Cloud order form to place an order for a customer system and follow your existing order placement processes to sign up for a Sage SalesLogix Cloud account. The Sage SalesLogix Cloud order form is different from existing order forms and captures information necessary to provision the customer account and deploy the Sage SalesLogix Cloud system. DO NOT use the existing order form for Sage SalesLogix Cloud orders. If you require assistance in placing an order or signing up for Sage SalesLogix Cloud please contact your RAM or RSM.   |
| <b>Turn-around Time</b>      | Once an order is received it will be validated by Sales Operations within one business day. If your order cannot be processed within one business day the designated contacts will be notified of any issues and estimated delivery time. Once an order is successfully validated by Sales Operations, Sage SalesLogix Cloud Operations will process the order and notify the designated contacts of system availability. If you require expedited processing please contact your RAM or RSM.  |
| <b>Customer Support</b>      | <ul style="list-style-type: none"> <li>• During normal business hours, customers receive ClassicCare support benefits for their designated contacts.</li> <li>• 24 x 7 monitoring and alerting are provided to ensure infrastructure availability. System alerts that may arise will be addressed to restore access and troubleshoot infrastructure issues 24 x 7 x 365.</li> <li>• A monitored e-mail box will be provided to receive off-hours problem reports. Infrastructure outages will be addressed immediately per the published Service Level Agreement (SLA).</li> <li>• Scheduled maintenance can be arranged by partners to allow for system restarts. Advanced notice will be required.</li> <li>• Sage will notify customers / partners when scheduled maintenance is required to perform security updates or to apply critical operating system patches.</li> </ul> |
| <b>Business Partner Role</b> | <ul style="list-style-type: none"> <li>• Escalates support issues to Sage following standard process.</li> </ul>   |

### Impact/Opportunity for Business Partners

- More new business opportunities: Drive 2x Net New Adds in Year 1
- Professional & Enterprise editions will be sold exclusively through the channel
- Workgroup customers will be aligned to a partner as they graduate to Professional/Enterprise
- More opportunities to provide professional services to cloud customers
- Greater retention of current install base
- Opportunity to provide vertical solutions in the cloud
- Opportunity to capture competitors' customers

### Training & Certification

Partners do not have to become Amazon experts in order to support their customers in the Cloud. The Sage service operations team will provide operational support for the customer environment so partners can focus on helping their customers be successful.

Sage will provide SalesLogix Cloud certification for Sage SalesLogix business partners in the Phase 1 timeframe. Training includes some of the following topics: understanding the Cloud environment, operational guidelines, supporting customers in the Cloud, and planning for customizations and upgrades.

Cloud certification for partners will be available in the Phase 1 timeframe and is required to receive support. Training includes an Anytime Learning course and online assessment that will be offered to partners at no charge.



## Sales Tools & Other Resources

We have a number of sales and marketing tools available.

**Partners:** Please visit Partners Online>Product Information>SalesLogix Cloud page.

**Sage Sales Team:** Please visit [eTeam](#).

## Frequently Asked Questions

### **Q: What are the main reasons a customer would want to move their CRM solution in the Cloud?**

A: Having Sage host software and hardware in the Cloud for businesses helps them minimize IT costs and involvement since Sage provides world-class support for them. Cloud solutions are also appealing because they eliminate capital expenditures with flexible, subscription-based licensing options.

### **Q: Are there any new features included with this release?**

A: Yes, the following features will be available in Sage SalesLogix Cloud Phase 1 (v7.5.3). These features will be available in Sage SalesLogix on premise in the next Sage SalesLogix release, anticipated in fall 2010.

This cloud release offers some enhancements such as desktop integration, a new Web administrator tool, role-based security for the Web Client, and sleek new widgets for the newly refreshed personal workspace tabs.

### **New Web Administrator Tool:**

This new tool does not replace the current SalesLogix Administrator, which you'll still have to access to do some things; however the new Web-based administrator lets you access common administrator tasks via the Web such as managing users and teams, pick lists, products, etc.

- Competitors - add, edit, or delete competitors that can be associated to an opportunity.
- Departments - add, edit, or delete departments that can be used as a specialized team.
- Lead Sources - add, edit, or delete lead sources that identify how a contact or lead was created.
- Literature Items - add, edit, or delete literature items available for literature requests.
- Library – add, edit, or delete library folders and documents.
- Pick Lists - add, edit, or delete pick lists to help users improve data consistency.
- Products and Packages - add, edit, or delete products and product packages (a collection of products) that can be associated to an opportunity or sales order.
- Teams - create and manage teams that can be used to define account ownership and access.
- Users - add users, manage profiles, and set security.
- Roles - manage a user's access to Web Client features by role.

### **Enhancement to Library**

- Manage Library folders and documents.

### **Update to Literature Requests**

- Fulfill, complete, or reject literature requests.

### **Desktop Integration for:**

- Drag and Drop Attachments
- Drag and Drop E-mail from Microsoft Outlook
- Outlook Integration - Send SLX and Record to History
- Mail Merge
- Export to Excel
- Drag and Drop Library files (Administrator only)

All of these features are browser agnostic, i.e., Firefox or Internet Explorer.

Sage SalesLogix Cloud Reference Guide

Last updated April 2010

**SAGE INTERNAL & PARTNER USE ONLY—SUBJECT TO CHANGE**

## **Sleek New Welcome Page Widgets**

Coupled with a visual refresh to the Welcome page, v7.5.3 offers new widgets enabling users to further personalize their Welcome page and workspace tabs and share that content with other users

- Group List Widget: customize to show a list for any entity or group within an entity, set list to show top number of records (e.g., top 10 opportunities), and work with it /sort it as you would a standard grid
- Link Widget: lets you bookmark your favorite areas or entities in the product or even favorite Websites or sources outside Sage SalesLogix
- Charting Widgets: create custom charts for any entity, group, dimension (filter) and metric that enable you to analyze data including bar, column, funnel, line, and pie charts

### **Q: Does Sage SalesLogix Cloud include both LAN and Web Clients?**

A: Sage SalesLogix Cloud is available for the Web Client only. The disconnected Web Client will be available in future phases.

### **Q: How will hot fixes and upgrades be applied?**

A: Customers will be able to control the time frame when upgrades/hot fixes take place. Partners will apply upgrades and hot fixes, but the Sage service operations team will be available for assistance.

### **Q: Is my data secure?**

A: Yes, the environment has been set up with numerous security measures such as SSL, locked down firewall ports, and a hardened Windows OS.

### **Q: If Sage is hosting this for my customers, will I have access to their environments to customize?**

A: Yes, partners will have remote desktop access to the environment.

### **Q: Will we be able to have multiple databases in the Cloud for development and testing?**

A: Yes, Sage will support this need.

### **Q: How would this work for verticals that are built on the SalesLogix platform? Are we able to create a custom image that can be copied to new instances?**

A: Yes, you will be able to create custom images. Sage sees this as one of the big advantages of this solution, and it provides a great opportunity for you.

### **Q: Are there any issues with licensing Microsoft Windows OS and Office?**

A: No. Windows licensing is included in the offer, and MS Office licensing is handled at the client machine.

### **Q: How do you maintain the operating environment? Is it through the RDP connection?**

A: Yes, Sage will perform backups, monitoring, and some aspects of DB and OS maintenance. The partner will access through RDP to do customizations, data migrations, etc.

### **Q: I've never signed up a customer for Sage SalesLogix Cloud. Who can I contact for help?**

A: Your RAM/RSM will be able to help you through the process.