Sage Investment Protection Program

Frequently Asked Questions

Updated April 24, 2013

This document answers frequently asked questions from customers and partners about migrating from one Sage ERP Mid-Market product to another.

What is the Sage Investment Protection Program?

If your ERP needs have changed, we want to ensure to keep you in the Sage family of ERP solutions and help you protect the investment that you have already made into Sage ERP products.

The Sage Investment Protection Program (SIPP) allows customers to receive a per-user trade-in credit for their old Sage ERP licenses. This credit can be applied against the purchase of user licenses for a new Sage ERP solution. Under the SIPP, Sage customers can migrate between the following Sage ERP products:

To From	Sage 100 ERP	Sage 300 ERP	Sage ERP X3
Sage Pro ERP	✓	✓	✓
Sage PFW ERP	✓	✓	✓
Sage 500 ERP	✓	✓	✓
Sage BusinessVision	✓	✓	✓
Sage BusinessWorks	✓	✓	✓

What about the products that preceded Sage Pro ERP?

Customers of SBT, Accpac Pro, BatchMaster, Platinum, and VisionPoint are included into the group of Sage Pro ERP customers for this special offer. Please contact your partner if you have questions about your eligibility.

What is the trade-in value of my old licenses ?

The trade-in value of your licenses varies by source product (your old ERP) and destination products (your new ERP), as detailed in the next few pages.

Sage Pro / Sage PFW licenses

Perpetual License	January 1, 2013 – September 30, 2013	October 1, 2013 – September 30, 2014
On-Plan Customers	No License Fees for migrations to Sage 100 ERP or Sage 300 ERP.	$2,000 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$2,000 per user Trade-in Credit for migrations to Sage ERP X3	
Off-Plan Customers	$750 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP	$500 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$750 per user Trade-in Credit for migrations to Sage ERP X3	

Perpetual License	January 1, 2013 – September 30, 2013	October 1, 2013 – September 30, 2014
All eligible On- and Off-Plan Customers	$50 trade-in credit per user/per month for up to two years max.	$25 trade-in credit per user/per month for up to two years max.

* Per-user trade-in credit cannot exceed the per-user license cost of the destination product. Trade-in credit for perpetual pricing applies to per-user pricing for applicable Financials, Distribution or Manufacturing bundles only. Trade-in credit cannot be applied toward products with module-based (à la carte) pricing.

Sage BusinessWorks / Sage BusinessVision

Perpetual License	January 1, 2013 – September 30, 2014	October 1, 2014 – September 30, 2015
On-Plan Customers	$1,500 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP	$1,000 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$2,000 per user Trade-in Credit for migrations to Sage ERP X3	
Off-Plan Customers	$750 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP	$500 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$750 per user Trade-in Credit for migrations to Sage ERP X3	

Perpetual License	January 1, 2013 – September 30, 2014	October 1, 2014 – September 30, 2015
All eligible On- and Off-Plan Customers	$50 trade-in credit per user/per month for up to two years max.	$25 trade-in credit per user/per month for up to two years max.

* Per-user trade-in credit cannot exceed the per-user license cost of the destination product. Trade-in credit for perpetual pricing applies to per-user pricing for applicable Financials, Distribution or Manufacturing bundles only. Trade-in credit cannot be applied toward products with module-based (à la carte) pricing.

Sage 500 ERP

Perpetual License	October 1, 2013 – September 30, 2014	October 1, 2014 – September 30, 2015
On-Plan Customers	No License Fees for migrations to Sage 100 ERP or Sage 300 ERP.	$2,000 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$2,000 per user Trade-in Credit for migrations to Sage ERP X3	
Off-Plan Customers	$750 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP	$500 per user trade-in credit for migrations to Sage 100 ERP or Sage 300 ERP
	$750 per user Trade-in Credit for migrations to Sage ERP X3	

Perpetual License	January 1, 2013 – September 30, 2013	October 1, 2013 – September 30, 2014
All eligible On- and Off-Plan Customers	$50 trade-in credit per user/per month for up to two years max.	$25 trade-in credit per user/ per month for up to two years max.

* Per-user trade-in credit cannot exceed the per-user license cost of the destination product. Trade-in credit for perpetual pricing applies to per-user pricing for applicable Financials, Distribution or Manufacturing bundles only. Trade-in credit cannot be applied toward products with module-based (à la carte) pricing.

How do I find out about other Sage product solutions and offers available to me?

If you are not familiar with Sage Accounting and ERP solutions, we would like to invite you to our bi-weekly product overview webcast. We will provide you with an executive overview of some of the functionality found in our other Sage ERP products, such as Sage 50 Accounting, Sage 100 ERP, Sage 300 ERP, and Sage ERP X3. Find out which Sage solution will fit your evolving business requirements. Click here for Registration Form

What are the Sage Business Care Plan requirements for migrating customers?

For migrating customers purchasing perpetual licenses, the purchase of a one-year Sage Business Care support plan is required (Gold or Silver).

For migrating customers purchasing subscription licenses, the Sage Business Care Gold support plan is already bundled as part of the subscription license.

Are there any third-party product discounts for migrating customers?

Yes, some of our independent software vendors have made special offers available to customers migrating under the Sage Investment Protection Program. A list of these partners and their offers can be found in Appendix 1 at the end of this document. Please verify pricing and conditions of these offers with your Sage business partner, or directly with the third-party providing the offer.

More information and Resources

To help our customers decide which Sage ERP solution is the best choice for their specific needs, we have put together a collection of resources to assist you in your research.

Migration Web Pages

- for Sage Pro ERP Customers
- for Sage PFW ERP Customer

Migration Success Stories

- Armed Services Mutual Benefit Association (Sage PFW → Sage 100)
- OptoSigma (Sage PFW → Sage 100)
- Marathon Brake (Sage PFW → Sage 300)

- Paragon Home Loans (Sage Pro → Sage 300)
- Ortho2 (Sage Pro → Sage 300)

The Sage Mid-Market portfolio of ERP solutions

- Sage 100 ERP
- Sage 300 ERP
- Sage ERP X3

Who do I contact if I have more questions?

In addition to talking to your business partner, you may also contact Sage directly at

1-888-760-0947

Brad Milinski
Brad.Milinski@Sage.com

Jonathan Abebe
Jonathan.Abebe@Sage.com

If you do not have a current Sage business partner, we can put you in direct contact with a local partner experienced in migrating Sage ERP solutions.

Appendix 1
Additional Sage Offers

When moving to Sage 100 ERP, Sage 300 ERP, or Sage ERP X3, customers are entitled to take advantage of these additional Sage product offers as detailed below:

Sage HRMS and Sage HRMS Payroll

Sage HRMS is an industry-leading, customizable HRMS solution that helps companies optimize their HR business processes as well as maximize their Return On Employee Investment (ROEI)™. Developed by HR professionals for HR professionals, Sage HRMS delivers a tightly integrated set of comprehensive features and functionality that increases efficiency and improves productivity at every level in the organization.

Sage is offering customers who own Payroll within Sage PFW ERP or Sage Pro ERP to receive a discount on Sage HRMS Payroll and Sage HRMS for their destination solution. The "In the Family" license discount is 100% for Sage HRMS, and 50% for Sage MRMS Payroll. One year of Sage Business Care Gold for HRMS or HRMS Payroll is required. This offer is valid until June 30, 2013.

For more details on the Sage HRMS offer, please contact:

Regional Account Managers

West & Canada Region
Deana Dearry
Direct: (727) 826-7684
Ext: x237684
Deana.Dearry@sage.com

Central Region
Tim Phelan
Direct: (727) 826-7749
Ext: x237749
Tim.Phelan@sage.com

East Region
Jim McCormack
Direct: (727) 826-7723
Ext: x237723
Jim.McCormack@sage.com

Strategic Account Managers

West/North/Canada Region
James Grisham
Direct: (727) 826-7745
Ext: x237745
James.Grisham@sage.com

East/South Region
Chris Goheen
Direct: (727) 826-7737
Ext: x237737
Chris.Goheen@sage.com

Appendix 2
Offers from Independent Software Vendors

Sage KnowledgeSync is a Business Activity Monitoring (BAM) solution from Vineyardsoft Corporation that monitors your ERP data for critical, time-sensitive information, such as overdue invoices, stock shortages, and clients who have changed their buying habits. When such conditions occur, Sage KnowledgeSync sends out alerts through a wide variety of devices and methods, including email, fax, cell phone, instant message, dashboard, and Twitter.

Discount for On-Plan Customers	**Oct. 1, 2012 through Sept. 30, 2013**	**Oct. 1, 2013 through Sept. 30, 2014**
Sage KnowledgeSync Enterprise Edition Perpetual License	$1,299 license discount	$ 799 license discount
Sage KnowledgeSync Enterprise Edition Subscription	50% per-user 24-month discount	25% per-user 24 month discount

Discount for Off-Plan Customers	**Oct. 1, 2012 through Sept. 30, 2013**	**Oct. 1, 2013 through Sept. 30, 2014**
Sage KnowledgeSync Enterprise Edition Perpetual License	$649 license discount	$ 399 license discount
Sage KnowledgeSync Enterprise Edition Subscription	50% per-user 24-month discount	25% per-user 24 month discount

Restrictions may apply. For more details on this offer, please contact Vineyardsoft at Info@Vineyardsoft.com or call 1-800-850-8055 for Donald Farber (ext. 113) or Tricia Cate (ext. 123).

INDUSTRIOS is a powerful manufacturing solution from INDUSTRIOS Software that integrates with Sage 300 ERP and Sage PFW ERP. For discrete manufacturers in make-to-order, make-to-stock, assemble-to-order, configure-to-order, and mixed mode environments, INDUSTRIOS has the tools to manage raw materials, sub-assemblies, WIP, and finished goods.

INDUSTRIOS Software is offering a discount on its core system to help customers transitioning to Sage 300 ERP and provide them with the manufacturing strength they need.

Discount for On- and Off-Plan Customers	**Oct. 1, 2012 through Sept. 30, 2013**	**Oct. 1, 2013 through Sept. 30, 2014**
On-Plan Sage Customers	$ 9,499 license discount	$ 9,499 license discount
Off-Plan Sage Customers	$ 9,499 license discount	$ 9,499 license discount

Restrictions may apply. For more information on this offer, please contact Dan Court at 905-829-2525 x252, or Paul Shantz at 905-829-2525, x280.

Technisoft Service Manager is the #1 service maintenance job cost application for Sage 300 ERP worldwide. Technisoft has over 25 years of experience in working with Sage on Sage 300 ERP, to produce a complete off-the-shelf ERP solution for the service maintenance industry.

Service Manager includes the features that will make your organization financially and operationally more efficient and secure, while giving you real-time insight on the profitability of your organization. With the integration to Sage CRM, Technisoft Service Manager now integrates with all the crucial elements of your operations.

Service Manager includes:

- Full Job Costing
- Project- and Equipment Management
- Warranty and RMA functionality
- Field Services
- Customer and Employee Portal Management
  and more….

The Service Manager core application can be tailored to fit needs through a variety of add-on modules. Please email Technisoft@technisoft.com.au or go to our website www.technisoft.com to learn more about Service Manager today.

Discount for On-Plan Customers	**Oct 1st 2012 through Sep 30th 2013**	**Oct 1st 2013 through to Sep 30th 2014**
Service Manager with all required options and unlimited user count.*	US$2,000 set-up fee payable directly to Technisoft	US$2,500 set-up fee payable directly to Technisoft

Discount for Off-Plan Customers	**Oct 1st 2012 through Sep 30th 2013**	**Oct 1st 2013 through Sep 30th 2014**
Service Manager with all required options and unlimited user count.*	US$2,000 set-up fee payable directly to Technisoft	US$2,500 set-up fee payable directly to Technisoft

*Purchase of three years software maintenance at 18% of the software value with 1st year payable at time of installation required, payable through your Sage 300 ERP Business Partner.

BatchMaster ERP is a complete Process Manufacturing suite fully integrated to Sage 300 ERP or Sage 100 ERP.

Commencing with a total re-write of the original BatchMaster-PFW in 2000 based on the MS SQL© database to vastly improve speed, scalability, and security, BatchMaster ERP works and thinks like Sage PFW, which means users will be familiar with the concepts and functionality. Of course, BatchMaster ERP has improved exponentially over the years, with much added functionally to meet current compliance mandates and modern business requirements.

In addition, many additional modules have been added to deliver a complete ERP solution: Master Production Scheduling (MPS), Advanced Production Scheduling (APS), EDI, Mobile WMS, Sample Management, Kosher Approvals, HACCP, Allergen, Halal & NFI control, Nutritional Labeling & FDA Audit Reports, GHS-compliant MSDS, Statistical forecasting, Role-based Dashboards; as well as Web Services like B2B & B2C storefronts, Business Portal for employees, and Vendor Collaboration portal.

Please email Sales@Batchmaster.com or go to our website www.Batchmaster.com to learn more.

Discount for On-Plan / Off-Plan Customers	**Oct. 1, 2012 through Sept. 30, 2013**	**Oct. 1, 2013 through Sept. 30, 2014**	**Regular Price****
BatchMaster ERP Business Essentials	$1,500 per user*	$2,100 per user*	$3,000 per user
BatchMaster ERP Advanced Edition (includes MPS, MRP, APS, most additional modules)	$2,000 per user*	$2,800 per user*	$4,000 per user
BatchMaster Product Management (stand-alone, designed for Formulators: basic Inventory, Laboratory/Formulas, BOMs, Costing, MSDS, can have Production added)	$1,000 per user*	$1,400 per user*	$2,000 per user

* Restricted to current PFW user licenses held. **Subject to change