

Reseller Program



Square 9 Softworks

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Welcome to the Square 9 Reseller Program Guide,

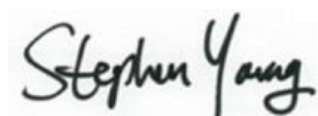
Thank you for your interest in helping us reshape the way businesses work through digital transformation and improved management of business information. Square 9 and its Resellers share a common commitment to delivering powerful, value-driven solutions that build long-term customer relationships through guaranteed success. This mutual commitment to succeed has helped our partners develop a unique sense of trust with their customers while making Square 9 the fastest growing digital transformation platform in North America.

This program is designed to provide you with the essential information and resources necessary for maximizing your performance and profitability goals through your partnership with Square 9. Our tiered program offering is designed to accommodate all levels of experience in solutions sales. This allows you to start where you're most comfortable and build your solutions practice over time. Please keep this guide to help plan your long-term strategy for building a successful solution program that includes a growing stream of recurring revenue through the sale of Square 9 products and services.

At Square 9, we believe the support we provide determines our mutual success. Our shared business model focuses on building a new base of customers while maintaining our long term relationships. We do this through industry-leading pre and post-sales support that's readily available when you are. We also offer a comprehensive eLearning program that allows your customers and your team to steadily expand their product knowledge at no cost and without the need to travel away from home. Finally, we guarantee the success of our delivery through a highly experienced team of technical professionals.

Upon completing your review of this guide, please feel free to contact your Regional Sales Director with any questions regarding the program. Once again, welcome to the Square 9 Reseller Program, and we wish you the best of luck in your solutions sales success.

Best regards,



Stephen Young
President & CEO

Advantages

The Product Advantage

Any strong reseller partnership begins with a great product. In the case of Square 9, it begins with a suite of products that includes solutions for Digital Transformation, Enterprise Content Management, Business Process Management, and Web Forms Management. Products can work independently, allowing our resellers to offer a single module or a fully integrated solution that includes all four. The choice is yours.

As a product suite that scales from small businesses or departmental applications to enterprise-wide adoption, Square 9 may be the only ECM partner you require. Because our platform was built to scale seamlessly, we feature a single technology stack that remains consistent regardless of whether you are a staff of three or a team of two thousand. As your customer's needs grow, simply add more licenses. There's no need for costly migrations that result in business interruption, staff re-training, or product replacement.

The Business Advantage

Square 9 offers a program that allows you to gradually grow your Digital Transformation practice as you build experience over time. Regardless of your achievement level, Square 9 provides services to all its partners allowing you to compete regardless of size:

- Unlimited access to on premise demonstration software and virtual machines for staff training and for presenting to your customers.
- Unlimited eLearning through Square 9's own Learning Management System. With the help of your Regional Sales Director, simply choose the track which best fits your experience and comfort level.
- Recurring revenue through the sale of Square 9's Cloud platform or through on premise support agreements. Square 9 helps you build a valuable financial annuity that grows exponentially over time.
- Reseller Portal - Find everything you need to be a leading reseller of Square 9 solutions, including access to our library of world-class digital transformation products along with materials and resources designed to ensure your success.
- Market Development Funds - As your sales grow, so does your participation in our Market Development Program which, provides funds for event hosting, sales contests, promotional offers, and more.

The Customer Advantage

Your customers will benefit from your participation in the Square 9 Reseller Program through access to cutting-edge business solutions, unparalleled product support, and a technology partner who genuinely cares about their successful journey towards digital transformation.

Most importantly, our program is designed to guarantee the success of your business in delivering digital transformation solutions so that the relationships you have worked to build are always protected. By leveraging the strength of Square 9's broad technology offering, you can provide your customers with an end-to-end solution from a single vendor. This eliminates the common handoffs in project delivery that can cause delivery delays or service disruptions. At Square 9, we've got you covered all the way through.



Reseller Program Tiers

The Square 9 reseller program consists of three tiers: Business, Authorized, and Elite which afford the reseller different levels of margin and program benefits. All new resellers have the option to join the program in either our Business or Authorized tier. Elite is reserved for resellers with a proven track record of sales success and who have committed themselves to the training required to actively support their customers.

Business	<p>The Business Partner tier is geared towards resellers that do not specialize in Enterprise Content Management (ECM) and lack the infrastructure to support it but would like to have the option of offering it to their prospective customers through Square 9. The Business Partner Program has no initial fee nor any revenue commitments to participate but still allows you to participate in recurring revenue through your subscription renewals.</p>
Authorized	<p>Square 9's Authorized Reseller tier is for organizations that offer ECM as a core offering. Authorized resellers will typically have a dedicated solutions person trained in selling Square 9 and other ancillary products. Authorized resellers are not required to have a trained support team however as all support is provided by Square 9. This saves you money and protects you from costly turnover while ensuring the highest levels of service for your customers.</p> <p>The Authorized tier has an annual \$3,500 reseller investment and a minimal commitment of 25 new opportunities per year for continued participation. In addition to enjoying our highest margins on products and services, Authorized Partners also enjoy the free use of a Cloud instance of our platform for their internal use or for demonstration. The annual fee can be earned back by half simply by achieving \$25,000 in annual revenue or in its entirety at \$50,000 in annual revenue.</p>
Elite	<p>The Elite Reseller tier is a "by invitation program" for our top-performing resellers. Elite Resellers must qualify with a proven track record of \$100,000 in revenue for the previous program year. The Elite tier comes with all the benefits of the Authorized tier, plus the highest margins on the renewals of their subscription portfolio.</p> <p>There is no annual fee for our Elite Reseller tier although there is a minimum of 40 new opportunities per year and a minimum support deck of 20 customers. An annual recertification is required in this tier, along with sales and technical training requirements.</p>

All reseller levels, except for Business resellers, are given the option of using a cloud hosted version of GlobalSearch Cloud for their own internal use and a single cloud-hosted instance for demonstration purposes.

Reseller Levels at-a-Glance			
Reseller Program Levels	New Opportunity Minimum	Required Training	Annual Fee
Business Partner	None Required	Not Available	None Required
Authorized Reseller	25 per year	Sales Level I Training Required	\$3,500 Annual Fee (May be earned back through revenue performance)
Elite Reseller	40 per year	Sales and Technical Training Requirements	Annual Renewal Fee Waived

Discount levels are also based on your reseller tier level and can be found in the chart below.

Reseller Discounts at-a-Glance			
Reseller Program Levels	Software and Subscriptions	Professional Services	Subscription Renewals
Business Partner	20%	20%	20%
Authorized Reseller	40%	20%	20%
Elite Reseller	40%	20%	40%



Program Definitions

New Reseller Qualifications

All new resellers enter the Square 9 program at the Business or Authorized Reseller tier. This allows the reseller to determine the best fit for their organization based on their expected commitment to selling digital transformation products. Resellers may upgrade their program tier by consulting their Regional Sales Director.

All new resellers must provide the following:

- Reseller demographic form with banking and financial references
- Completed W-9 and Resale Certificate for tax-exempt status

Qualified Sales

The amount of Qualified Sales determines your tier status in the Square 9 Reseller Program. Qualified Sales are equal to the amount paid to Square 9, less any applicable taxes. Qualified Sales amounts apply to sales that meet any of the following criteria:

- New and Add On License Sales: Includes all GlobalSearch, GlobalCapture, GlobalAction, GlobalForms license sales
- All Square 9 Subscription Sales: Includes both on premise and cloud-based product subscription sales
- All-New Maintenance & Support Sales: (M&S renewals do not qualify as Qualified Sales.)
- Square 9 Contracted Professional Services Labor: Installation, training, and solution design services, SQL, and other custom development

Program Year

The program year is defined as the period of July 1st through June 30th and is used to measure Qualified Sales. All resellers will be notified of their program status 30 days after the end of any program year. All new resellers who join during the program year will have their Qualified Sales prorated accordingly using the number of participating months.

Qualified Uses for Market Development Funds

Market Development Funds are provided to assist the reseller in growing their ECM business practice through sales and marketing initiatives. All market development fund disbursements must be approved in writing by your Square 9 Regional Sales Director. Examples of qualified uses include but are not limited to:

- Customer facing events, technology and trade shows
- Advertising or promotional activities that include the Square 9 logo
- Sales contests that promote the sales of Square 9 products or services
- Square 9 marketing merchandise to be used as promotional giveaways

Not For Resale Software for Resellers

All reseller levels above the Business Partner tier are entitled to access Square 9's entire suite of products at no cost for their internal use. This not only provides our resellers with enormous digital transformation opportunities, but it also delivers the added benefit of experiencing the solutions that they sell. This reseller benefit represents access to over \$15,000 a year in cloud licensing and includes the following configuration:

- GlobalSearch Cloud Enterprise Essentials with 15 Named Users
- GlobalCapture Cloud Transformation Services (Up to 1,000 pages per day)
- Unstructured Data Extraction with Transform AI (Up to 1,000 pages per day)
- Unlimited GlobalAction Workflows
- Unlimited GlobalForms workflow licenses

These products are for internal use only and may not be sold, distributed, or used to provide paid services to another organization.

Subscription, Maintenance, & Support Program

Square 9 offers traditional licensing for on premise software purchases and subscription-based solutions for both on premise and cloud-based models. Traditional licensing purchases include a Maintenance & Support (M&S) subscription that provides access to upgrades and service packs, along with a team of support professionals that can troubleshoot issues and answer questions. This guarantees their software investment will always be up to date with future technology upgrades and that they will have qualified assistance as needed.

Software subscriptions and M&S agreements act as a critical part of the reseller's ARR business model by delivering a steadily growing annuity that allows them to increase profitability and grow their solutions infrastructure. At the same time, revenue from support ensures funding to Square 9 to research and develop new and existing products.

Maintenance & Support Defined

- **Initial Purchase:** First-year Software Maintenance & Support is required with the purchase of any on premise Square 9 licensed product and is calculated at 20% of the licensing MSRP, which is found on the Square 9 price list.
- **Maintenance & Support Activation:** Software Maintenance & Support is activated when the product is registered or 30 days after delivery, whichever comes first. The renewal date will be one year from the activation date.

Maintenance & Support Renewals

Renewal of Software Maintenance & Support is optional but highly recommended and should be effectively promoted and managed by the reseller. Every effort is made by Square 9 to drive Maintenance & Support through the reseller channel.

- **Invoicing:** Square 9 will send the reseller a pro forma invoice 90 days prior to the renewal date to allow sufficient time for the reseller to invoice their client for support.
- **Renewal Status:** The Maintenance & Support invoice must be paid by the reseller to Square 9 prior to the renewal date. Maintenance & Support agreements not paid by the renewal date will be assigned a lapsed status and no support, patches, or upgrades will be available to the client.
- **Re-Activation:** The client may reactivate their Maintenance & Support agreement through the reseller retroactive to the original expiration date if received within 30 days of lapsed status.
- **Deactivated Accounts:** If the Maintenance & Support agreement is not reactivated within 60 days after the renewal date, the account will be deemed inactive and assigned to the Square 9 customer retention team for direct renewal efforts.



Software Subscriptions

Initiation of Service

Square 9 will initiate service and issue log-in credentials to the registered reseller. Please refer to the Cloud Terms of Service at <https://www.square-9.com/cloud-solutions-terms/> for more details. The Effective Date of Service will commence with the initiation of services from Square 9.

Renewal of Service

You will receive notification of your customer's service renewal within 90 days of the anniversary of your Effective Date of Service (The Renewal Date). If you elect to continue your service, payment must be received prior to the Renewal Date to avoid any interruption of service. Active renewal of Software Subscriptions should be effectively promoted and managed by the reseller. Every effort is made by Square 9 to drive software subscriptions through the reseller channel.

- **Invoicing:** Square 9 will send the reseller a pro forma invoice 90 days prior to the renewal date to allow sufficient time for the reseller to invoice their client for support.
- **Renewal Status:** The reseller must pay the invoice for subscription services to Square 9 prior to the renewal date.
- **Reactivation:** The client may reactivate their subscription agreement through the reseller retroactive to the original expiration date if received within 30 days of lapsed status.
- **Deactivated Accounts:** If the subscription is not reactivated within 30 days after the renewal date, the account will be deemed canceled and terminated. The account will be assigned to the Square 9 customer retention team for direct renewal efforts.



Elite Reseller Delivered Software Support

Elite Resellers delivering software support must be Square 9 certified annually to install, design, and support our products. Initial customer support calls would be managed by the reseller's help desk. Issues that cannot be resolved by the reseller are escalated to the Square 9 help desk via email request, web request, or through direct calls to the Square 9 help desk.

As the front line for customer support, resellers who maintain a certified technician on all products being supported receive product discounts on software commensurate with their Reseller Level Assurance.

Failure to re-certify annually will reduce the reseller for a 20% discount on the initial sale of Maintenance & Support and on renewals but are not eligible for applicable earn-ups afforded to them under the program. Elite Resellers are also encouraged to bundle service offerings with the Maintenance & Support plan to build value in their program as a managed service provider. Examples of these services include scheduled upgrades and on-site services.

Square 9 Delivered Software Support

Business Partners and Authorized Resellers will benefit by having Square 9 provide direct software support. The Square 9 help desk will act as the primary support agent providing unlimited telephone or remote web-based support to your customers from 8:30 AM to 8:00 PM ET M-F.

Business Partners and Authorized resellers while not offering direct support, will still receive a 20% discount on the initial sale and renewal of Maintenance & Support or Subscriptions to allow every reseller to participate in a growing annuity stream.



Square 9 Product Certification

Square 9 offers robust online training courses for both your sales and technical teams. By taking advantage of the Square 9 free eLearning platform, resellers will benefit by building the skills necessary to deliver their own professional services.

Sales Certification Track

Enhance your skills with courses focused on finding opportunities, the advantages and benefits of Square 9 solutions, and emphasizing product demonstrations to support you during the sales process. Start by learning to find opportunities and work your way up to becoming a Square 9 solutions selling expert.

- Getting Started Selling Square 9 Solutions
- Reseller Sales Expert: Level 1
- Reseller Sales Expert: Level 2
- Reseller Sales Expert: Level 3

Technical Certification Track

Bring your skills to the next level through courses designed to teach you the how and the why of solution design. This track is required for resellers who wish to do their own professional services and benefit from participation in the Elite Reseller Program. Obtaining Technical Certification requires successful completion of levels 1 and 2.

- Reseller Technical Expert: Level 1
- Reseller Technical Expert: Level 2
- Reseller Technical Expert: Level 3 (optional)

Recertification

Resellers must recertify annually on both sales and technical knowledge in order to maintain enhanced earn ups on their margins.



