Reseller Program

Square 9 Softworks

Address:

127 Church Street New Haven, CT 06510

Contact:

(203) 789-0889
sales@square-9.com
www.square-9.com

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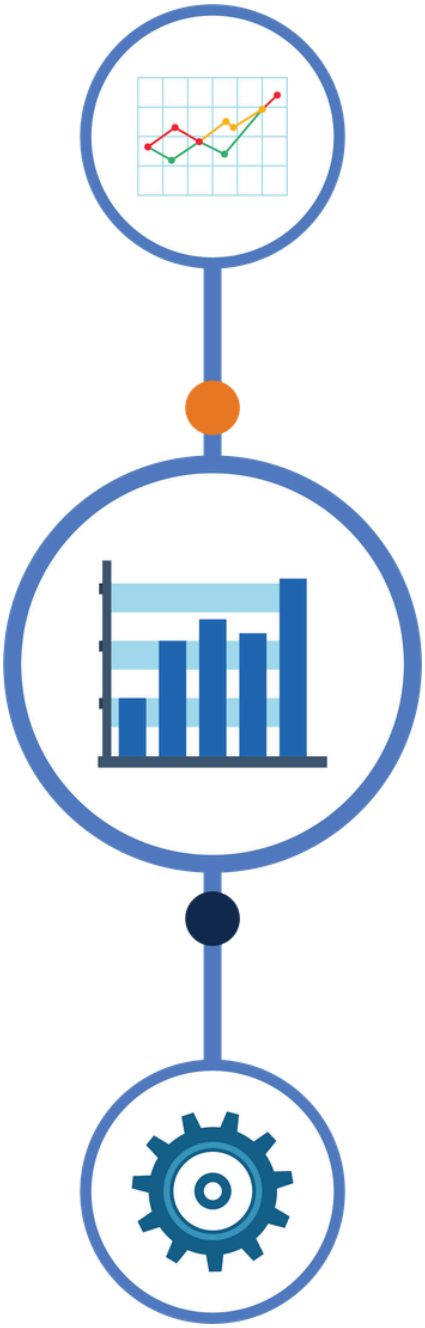
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INTRODUCTION



Welcome to the Square 9 Reseller Program Guide,

Thank you for your interest in helping us reshape how businesses work through intelligent document processing 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 solutions 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 customer base while maintaining 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 helps your customers and your team steadily expand their product knowledge at no cost, without needing to travel away from home. Finally, we guarantee successful delivery through a highly experienced team of technical professionals.

After reviewing this guide, please contact your Regional Sales Director with any questions about 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. With Square 9, it begins with a suite of products that includes solutions for Intelligent Document Processing (IDP) and Enterprise Content Management (ECM). Intelligent Document Processing, which includes web forms management, can be offered as a stand-alone solution or with an integrated Content Repository and Business Process Automation. How you best serve your customer's unique needs is entirely up to you.

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

• The Solutions Marketplace - build out your solutions offering through a shared portal that allows you to download common workflow designs and integration tools. Or develop your own offering and market it to other resellers through this free vehicle available to our reseller community.

• 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 next-generation 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 help your business succeed in delivering digital transformation solutions, so the relationships you have worked to build are 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 has three tiers, Business Partner, Authorized, and Elite, that offer resellers different levels of margin and program benefits through recurring revenue. All new resellers can join the program in either the Business Partner or Authorized tier. Elite is reserved for resellers with a proven track record of sales success who have committed to the training required to support their customers actively.

Business Partner

The Business Partner tier is geared toward resellers that do not specialize in Intelligent Document Processing or Enterprise Content Management and lack the infrastructure to support it, but would like the option to offer it to prospective customers through Square 9. The Business Partner tier has no initial fee or revenue commitments, but still lets you participate with industry-leading margins on new software sales through a referral-based program.

Authorized

Square 9's Authorized Reseller tier is for organizations that offer IDP or ECM as a core offering. Authorized resellers typically have a dedicated solutions person trained to sell Square 9 and other ancillary products. Authorized resellers are not required to have a trained support team; however, Square 9 provides all support. This saves you money and protects you from costly turnover while ensuring the highest levels of service for your customers.

The Authorized tier has an annual $3,500 reseller investment, which you can earn back by half at $25,000 in annual revenue or in full at $50,000 in annual revenue. The Authorized tier requires a minimum commitment of 25 new opportunities per year to continue participating. In addition to enjoying our highest margins on products and services, Authorized Partners also get free use of a Cloud instance of our platform for internal use or demonstration.

Elite

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 includes all the benefits of the Authorized tier, plus the highest margins on renewals of their subscription portfolio.

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. This tier requires annual recertification, along with sales and technical training.

All reseller levels, except Business Partner resellers, can use a cloud-hosted version of GlobalSearch Cloud for internal use and a single cloud-hosted instance for demonstrations.

Reseller Levels at-a-Glance

Reseller Program Levels	New Opportunity Minimum Required	Required Training	Annual Fee
Business Partner	None Required	Not Available	None Required
Authorized Reseller	25 per year	Sales Level 1 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 Subscriptions	Professional Services	Subscription Renewals
Business Partner	40%	NA	NA
Authorized Reseller	40%	10%	20%
Elite Reseller	40%	10%	40%

Program Definitions

New Reseller Qualifications

All new resellers enter the Square 9 program at the Business Partner 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

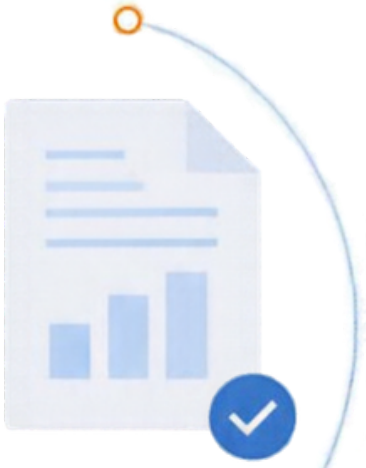
Qualified Sales

Your Qualified Sales level 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. Subscription renewals do not count toward Qualified Sales. The following criteria qualify toward recognition for your Qualified Sales:

- All Square 9 Subscription Sales: Includes both on premise and cloud-based product subscription 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 help resellers grow 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 gives our resellers enormous digital transformation opportunities, but also lets them experience the solutions they sell. This reseller benefit represents access to over $20,000 a year in cloud licensing and includes the following configuration:

- GlobalSearch Cloud Enterprise Essentials with 15 Named Users
- 15 Named Read-Only users
- Square 9 Guest User Licensing
- InquireAI (Up to 500 pages per month, volumes over 500 the dealer is required to purchase Production InquireAI)
- Integration connectors for QuickBooks, NetSuite, Dynamics 365, and our Universal iPaaS Connector
- 100GB of Document Storage

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

Software Subscriptions

Initiation of Service

Square 9 will initiate service and issue login 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 when Square 9 initiates services.

Renewal of Service

Elite and Authorized Resellers will receive notification of their customer's service renewal within 90 days of the anniversary of the Effective Date of Service (The Renewal Date). If your customer elects to continue the service, you must receive payment before the Renewal Date to avoid any interruption of service. Active renewal of Software Subscriptions should be effectively promoted and managed by the reseller. Square 9 makes every effort to drive software subscriptions through the reseller channel.

- Invoicing: Square 9 will send Elite and Authorized resellers a pro forma invoice 90 days prior to the renewal date to allow sufficient time for the reseller to invoice their client for support. (Renewals for customers sold under the Business Partner tier are invoiced directly from Square 9)
- 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.

SOFTWARE SUPPORT

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 supported products receive product discounts on software commensurate with their Reseller Level Assurance.

Failure to re-certify annually will reduce the reseller to a 20% discount on the initial sale of Maintenance & Support and on renewals, but they 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 include scheduled upgrades and on-site services.

Square 9 Delivered Software Support

Business Partners and Authorized Resellers benefit from Square 9 providing 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.

Product Certification

SQUARE 9 LEARNING PATH

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.

01 / SALES

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

02 / TECHNICAL

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. To obtain Technical Certification, you must successfully complete Levels 1 and 2.

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

Recertification

ANNUAL REQUIREMENT

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

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