

The background features several overlapping, wavy lines in various shades of green, ranging from a dark forest green to a light lime green. These lines create a sense of movement and depth, framing the central text.

# Sage North America partner branding guidelines

A comprehensive resource for Sage business  
partners and certified consultants

November 17, 2008



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# Overview

The goal of the *Sage North America partner branding guidelines* (the “Guidelines”) is to provide partners with the ability to communicate in tandem with Sage. Together, as one consistent, unified voice we can increase the effectiveness of our marketing efforts while maintaining the integrity of the Sage brand.

The intent is for partners to adhere to these guidelines to strengthen marketing and Web strategies over the long term. Partners should plan to update their logos and fully adhere to the guidelines by April 1, 2010. Using these directives designed to help Sage brand its software solutions uniformly through its business partner channel, we can successfully reach out to our installed base of customers in addition to prospects in targeted markets.

Partner marketing communication efforts are an important part of the endeavor to present one face to customers and to build a strong brand. For that reason, compliance with these guidelines is mandatory. Partners managing vendors who are creating marketing materials are responsible for seeing that the guidelines policy is followed. Contact [websites@sage.com](mailto:websites@sage.com) with questions.

# About trademarks and service marks

To protect the valuable trademarks, service marks, and trade name rights owned by the Sage family of companies (collectively “Sage”), these guidelines must be followed. The guidelines will answer most questions regarding the use of the Sage marks and trade names. When in doubt, however, please contact us at [websites@sage.com](mailto:websites@sage.com) for clarification.

The proper use of the Sage marks and trade names is critical to the continued success of our collective commercial efforts. Sage has devoted significant resources to promoting its products, services, and corporate identity. By adhering to these guidelines for proper use of marks and trade names, Sage authorized business partners, authorized consultant partners, certified consultants, premier trainers, premier advisors, distributors, development partners, software integration partners, and other colleagues—along with Sage employees—will ensure that customers continue to recognize the quality and value of Sage products and services.

If you become aware of any unauthorized use of a Sage mark or trade name, please contact us immediately at: [websites@sage.com](mailto:websites@sage.com)

## Definitions

As used in these guidelines, the terms are defined below as follows:

**Trademark:** Any word, phrase, symbol, logo, or other device (or any combination thereof) that is used by Sage to identify and distinguish its products (for example: Sage Abra HRMS software).

**Service mark:** Any word, phrase, symbol, logo, or other device (or any combination thereof) that is used by Sage to identify and distinguish its services (for example: SimplyCARE update and upgrade service). A service mark is a trademark—the term simply makes a distinction between products and services.

**Trade name:** A trade name is a common name used to represent the business instead of the legal name (for example, Sage or Sage North America instead of Sage Software, Inc.).

# Branding elements

## Company name

Correct usage of the Sage name in materials is important to maintaining corporate identity and reinforcing branding efforts. The company should be referred to as Sage (or Sage North America, when appropriate) in all marketing documents and similar literature.

## Product and service names

Trademark rights can be jeopardized if marks are not used properly. Accordingly, in all print and electronic publications (for example: press releases, advertisements, marketing materials) and product packaging, please follow these guidelines.

**1. Trademarks or service marks should be not be abbreviated.** For example, “Sage Accpac” is the trademark for the ERP software solution, not simply “Accpac.” For a complete list of proper Sage product names, see Appendix A.

### Incorrect:

- Accpac ERP can be used with other Sage products. For example, Abra HRMS can work seamlessly with it.
- Accpac and Pro are complete accounting solutions. They may be used with numerous add-on modules. Advantage Series Order Entry is one of the most popular modules.

### Correct:

- Sage Accpac ERP software solutions can be used with other Sage products. For example, Sage Abra HRMS can work seamlessly with it.
- Sage Accpac and Sage Pro are complete ERP solutions. They may be used with numerous add-on modules. Sage Accpac Order Entry is one of the most popular modules.

## 2. Do not use marks in the possessive or plural form.

### Incorrect:

- Sage’s efficiency is outstanding.
- Five Simply Accountings were sent out yesterday.

### Correct:

- Sage financial services are highly efficient.
- Five Simply Accounting programs were sent out yesterday.

## 3. NEVER combine a Sage trademark or product name with a third-party trademark or product name.

### Incorrect:

- Sage MAS 500 Crystal Reports® is available...
- Primavera Sage Timberline Office products are integrated.

### Correct:

- Crystal Reports® is available for your Sage MAS 500 software system...
- Primavera products are integrated with Sage Timberline Office.

## Sage product descriptions

The *Sage Products and Modules Descriptions* document provides business partners with instructions on how to use Sage-branded products and services in copy. Examples include product descriptions that are 25 words, 50 words, and longer, along with module listings (if applicable) and specific usage rules for writing about Sage products. This reference document is available on the Business Partner Marketing Web site, [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com), under the Logos and Branding tab.

## Logos

The Sage logo is the most important element of our visual identity system. It is essential that Sage partners help preserve its integrity at all times by adhering to all Sage partner logo guidelines.

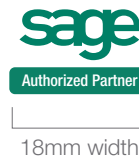


The role Sage partner logos play in communications is to signify to audiences that they are interacting with a Sage partner. It can be used in conjunction with a partner company logo, but should appear smaller and/or less prominently.

Sage business partners are permitted to use only the partner logos for which their company is authorized (for example, authorized partner logo, plus any logos that require special certification, such as Certified Trainer). **The Sage corporate logo should never appear on business partner-produced marketing materials, packaging, or collateral.** The Sage corporate logo is comprised of "Sage" standing alone without any other indications. The use of the Sage corporate logo is strictly reserved for Sage. Sage corporate logos in any advertising material need to be replaced with the appropriate product-specific Sage partner logo. All business partner approved logos can be found at [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the Logos and Branding tab.

## Minimum size

The recommended minimum size for the Sage logo is 18mm across the width.



## Clearspace

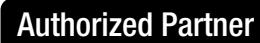
Clearspace is the minimum area of space around the Sage logo. To protect and ensure impact of the Sage logo, no element should infringe on the clearspace. The clearspace dimensions are specified in the diagram below.



## Color hierarchy

The preferred version of the Sage logo should appear in Pantone 335 on a white background. Where color is not available, such as in a newspaper advertisement, the Sage logo should appear in black.

**The Sage partner logos should never appear on a background of any other color.**

The Sage logo is rendered in a vibrant green color, with the word "sage" in a lowercase, rounded, sans-serif font.A dark green rectangular badge with rounded corners, containing the text "Authorized Partner" in white, uppercase, sans-serif font.The Sage logo is rendered in black, maintaining the same lowercase, rounded, sans-serif font as the green version.A black rectangular badge with rounded corners, containing the text "Authorized Partner" in white, uppercase, sans-serif font.

### Important

**Do not** reconstruct the logo

**Do not** distort or manipulate the logo

**Do not** infringe on the minimum clearspace area

**Do not** make any additions to the logo. Instead place any elements outside of the clear space area and ensure they do not appear locked up with the logo

**Do not** add any effects to the logo (for example, drop shadows or render)

**Do not** apply the logo in any color other than Pantone 335 or black

Examples of Sage partner logos



## Use of Sage partner logos in conjunction with other elements

- When using a company logo and tagline in conjunction with a Sage partner logo, it is necessary to abide by the clearspace guidelines as specified above.
- A partner company logo may never appear smaller than the Sage partner logo. Make sure the partner company logo is more prominent than the Sage partner logo.
- Do not add any graphical treatments or elements to partner logos, (for example: no lightning bolts coming out of the logo) or combining a mixture of the partner company logo and the authorized partner logo.
- Do not place product names or other information directly beneath Sage partner logos unless this information is built into the logo file itself.

## Guidelines for additional marketing elements

### Partner taglines

Use of the name “Sage” in a corporate tagline is prohibited without the consent of Sage. Taglines suggesting a higher level of endorsement or backing by Sage will be rejected.

### Awards

Unless they are provided by Sage, partners may not use the graphics or icons of any awards that Sage has earned. Partners may state that Sage has won the awards, but shall not make any statement that would tend to make third parties believe that their company won the awards.

# Internet policy

The business partner Internet policy applies to Web sites directly or indirectly owned, affiliated, or sponsored by partner companies, and extends to third-party Web sites, including search engines and any Internet advertising (for example: banners, URL redirects, online advertising, pay-per-click, product descriptions, product titles, page headings, sub headings, copy text, and blogs). By enforcing these guidelines, the objectives are to ensure that:

- Authorized business partner Web sites promote their business and Sage products and services in a professional and ethical manner that is not misleading to the public.
- Graphical and branding elements for Sage products and services are displayed accurately and in accordance with the Sage Business Partner Branding Policy.
- Partner Web sites do not attempt to mimic Sage corporate or product Web sites in a way that misrepresents the Sage / partner relationship.
- Partner company names are clearly indicated on all Web pages where Sage partner logos. Partner logos, the Sage name, and product names appear. It must be clearly apparent that a partner Web site is not a Sage Web site.

## Usage of Sage marks in URLs and e-mail addresses

Absent express written authorization from Sage, no party may use “Sage,” “Sage Software,” any Sage trademark, any Sage product or service names, or any confusingly similar marks or names as its domain name or portions thereof.

Sage product or service names may not be included in partner e-mail addresses or Web site URL domain names. However, partners may include these names as part of supporting Web pages, for example: [www.ABCcompany.com/sagemas90](http://www.ABCcompany.com/sagemas90)

**ONLY** Sage Select business partners may include Sage product names in subdomain Web pages, but they must be used in conjunction with the business partner’s company name, for example: [www.sagemas90.ABCcompany.com](http://www.sagemas90.ABCcompany.com)

## Advertising and discounts on Web sites

- Partners are discouraged from advertising Sage products and services at a discount on their Web sites with the exception of official Sage promotions (see below).
- Partners may display Sage suggested list price (“List Price”) for products and services that they are authorized to sell. Depending on which products they represent, partners can find List Prices on the password-protected Web site for their particular business unit. If you don’t know where to find List Prices for your product, please contact your Regional Partner Manager.
- Do not indicate in writing that Sage forbids displaying discounted pricing. Instead state, “These are suggested list prices from Sage. Please click here or call 800-123-4567 for a customized price quote based on your individual business needs.”
- Partners may promote special offers made by Sage for products and services that they are authorized to sell.

- Partners are prohibited from using absolutes or superlatives when referencing any product pricing. This includes the use of language such as “the lowest price.” Partners may not advertise “guaranteed lowest prices” on the Internet, Web sites, or in pay-per-click advertising or use similar phrases. The following phrases or similar such phrases are not permitted:
  - Rock-bottom prices
  - We will not be undersold
  - Guaranteed lowest prices
  - We won’t be beat on price
- Similarly, business partners may not include such phrases as part of their URL addresses. For example, [www.cheapsageMAS90.com](http://www.cheapsageMAS90.com) is prohibited.
- Partners are allowed to negotiate and charge prices lower than List Price—they just cannot advertise those lower prices on the Internet.

### Official Sage promotions

Partners may advertise official Sage promotions that are discounts on their Web sites, as long as they follow the same expiration dates of the official Sage promotions. This means partners should remove any promotional messaging from their Web sites once the promotion expires. The most current promotions for specific products can be found by visiting password-protected partner Web sites.

## Web graphics

In accordance with the following guidelines, Sage partners may create Web graphics using Sage product names:

- Partners must get pre-approval prior to posting by submitting proposed Web graphics to: [websites@sage.com](mailto:websites@sage.com)
- Partners may include the product name or the product logo (for retail products) within the Web graphics.
- When using Sage product box shots as part of Web graphics, partner should be sure to use the latest version.

## Usage of Sage intellectual property on Web sites

- Partners may use Sage intellectual property unaltered and exactly as is, such as white papers, flash demos, PDFs, marketing collateral, press releases, pre-recorded WebEx presentations, product names, licensed photos, Web site copy, brochure copy, and more, if it is identified as “Released to Sage Authorized Business Partners.”
- On every Web page that Sage intellectual property appears, partners must also add the following phrase to the credit line statement, “Used with permission from Sage Software, Inc.” and provide a live link to: [www.sagenorthamerica.com](http://www.sagenorthamerica.com)
- For Sage intellectual property not authorized to the business partner community as a whole, partners must receive written permission from Channel Marketing before using. Send an e-mail to [websites@sage.com](mailto:websites@sage.com) to request permission. When written permission is granted, partners must display the materials in the exact form specified by Sage and may not modify it any way.
- Partners must accurately display current product names. See Appendix A for proper name usage.

## Attribution on Web sites

Partner Web sites must clearly and conspicuously state on the home page or, if the pages relating to Sage products are not on the home page, on the pages of the site where Sage products are offered or displayed, the following legend:

*This Web site is owned by [company name]. [Company name] is independent from Sage and is not authorized to make any statement, representation or warranties or grant any license or permission on behalf of Sage regarding any product, service or Web site content. Certain materials made available on or through this Web site are owned by Sage and cannot be used without the prior written permission of Sage.*

## Other Web site dos and don'ts

- Do clearly display the partner company name and branding elements at the top of the partner Web site and any subdirectory pages where Sage products are mentioned and Sage-authorized business partner logos are displayed.
- Do not attempt to appear as a Sage Web site or as a manufacturer of a Sage product. Sage product names may be displayed at the top of a partner's Web page as long as the product name is positioned at least 90 pixels away from the business partner's company logo.
- Do ensure Sage partner logos and product-specific graphic elements appear smaller than the business partner company logo and branding elements, unless the resolution of the images when resized do not appear clearly.

## Web resource guide

Sage seeks to support partners in their efforts to ensure that Web sites are in compliance with these guidelines. In addition, Sage wants to provide resources to optimize partner Web sites and other available Internet tools. This is why the company created a Web Resource Guide that will improve partner Web sites both as a brand and lead generation tool. The guide is available on the Channel Marketing Web site [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) under the Education Center tab.

# Attributions, trademark symbols, and credit lines

## Use of trademark and registration symbols (™ ®)

The Sage policy is that trademark symbols do not have to be used with any of the Sage business lines except in the instances where the company is contractually obligated to do so. You must add a symbol to the brand trademarks for Crystal Reports®, UPS®, GoToMyPC®, GoToMeeting®, Access Your PC from Anywhere®, Microsoft® SQL Server®, and Windows Vista® for every first reference in body copy only, as well as attribute their corresponding legal credit line (see “Attribution of specific third-party marks” to the right). This policy applies to all materials, including advertising, marketing collateral, documentation, user interface elements, and logos used in any media. Please adhere to respective trademark owners’ trademark usage guideline for all other third-party trademarks. If such symbols are used in user interface elements or materials already published or “frozen,” there is no need to redo the materials to remove the symbols.

## Attribution of Sage in credit lines

All uses of Sage marks must be accompanied by a credit line towards the bottom of the piece (for example: packaging, electronic communications or other collateral). Please use the language outlined below. Each credit line should lead with “Sage.” Credit lines must also include any specific attribution of third-party marks that Sage is contractually obligated to list in the credit line (see Section V above). Finally, a general attribution should be included to cover all other third-party marks. The following credit lines should appear in a type size of at least eight points:

### For printed material:

*Sage, the Sage logos, and the Sage product and service names mentioned herein are registered trademarks or trademarks of Sage Software, Inc., or*

*its affiliated entities. All other trademarks are property of their respective owners.*

### For Web sites:

*This Web site is owned by [company name]. [Company name] is independent from Sage and is not authorized to make any statement, representation or warranties or grant any license or permission on behalf of Sage regarding any product, service or Web site content. Certain materials made available on or through this Web site are owned by Sage and cannot be used without the prior written permission of Sage.*

## Attribution of specific third-party marks in credit lines

Sage and its business partners are contractually obligated to include specific credits in the credit line and insert appropriate trademark symbols on specific third-party marks. Please use the exact wording below as part of the legal credit line if a piece or packaging contains the following third-party trademarks:

- Business Objects and the Business Objects logo, BusinessObjects and Crystal Reports are trademarks or registered trademarks of Business Objects in the United States and/or other countries.
- UPS, the UPS brandmark and the Color Brown are trademarks of United Parcel Service of America, Inc.
- GoToMyPC, GoToMeeting and Access Your PC from Anywhere are trademarks or Citrix Systems, Inc. and/or one or more of its affiliates and may be registered in the United States Patent and Trademark Office and in other countries.
- Microsoft SQL Server, Windows Vista and the Windows logo are trademarks or registered trademarks of Microsoft Corporation in the United States and/or other countries.

# Violations

## Penalties

Sage business partners who violate the Sage North America partner branding guidelines will be notified by e-mail and will have seven calendar days to rectify the issue. If the issue is not resolved after seven days, the business partner will receive a second and final written notice with 30 days to resolve the matter. Partners cannot repeatedly violate the policy to take advantage of the 30-day grace period to fix the issue. Failure to resolve the issue will result in the three following penalties:

- **First penalty:** Loss of Sage Select benefits, co-op benefits, and Marketing Alliance Program eligibility for three months, plus removal from lead grid. If the partner Web site is not in compliance within 30 days, the partner will immediately enter the Second Penalty phase.
- **Second penalty:** Loss of benefits included in first offense, along with the loss of 10 points from the current tier margin and loss of eligibility for the Partners for Growth programs. Plus, loss of eligibility for Sage recognition programs such as President's Circle, Partner of the Year, and others, for the next eligible time period. If the partner Web site is not in compliance within 30 days, the partner will immediately enter the Third Penalty phase.
- **Third penalty:** Termination of partner agreement resulting in de-authorization.

Penalties are subject to change.

# Appendix A: Product name usage

## Sage product names

ACT! by Sage	Sage Community Banking	Sage Intergy RIS
ACT! by Sage Premium	Sage Compliance Services	Sage Intergy PACS
ACT! by Sage Premium for Web	Sage Compliance Trainer	Sage MAS 90 ERP
ACT! by Sage for Real Estate	SageCRM	Sage MAS 200 ERP
ACT! by Sage Premium for Real Estate	Sage CRM	Sage MAS 500 ERP
ACT! by Sage for Financial Professionals	SageCRM.com	Sage Master Builder
ACT! by Sage Premium for Financial Professionals	Sage CRM Solutions	Sage Medical Manager
DacEasy by Sage	Sage Data Services	Sage MedWare
Millennium	Sage Electronic Check Services	Sage MIP Fund Accounting
Peachtree by Sage Complete Accounting	Sage Endowment Management	Sage Online Reporting
Peachtree by Sage First Accounting	Sage Entrepreneur – Accountants' Edition	Sage Payroll Services
Peachtree by Sage Payroll with Pro Accounting	Sage Entrepreneur – Enterprise Edition	Sage PCN MENDS
Peachtree by Sage Premium Accounting	Sage Entrepreneur First Step	Sage PFW ERP
Peachtree by Sage Premium Accounting – Accountants' Edition	Sage Entrepreneur HR	Sage Practice Analytics
Peachtree by Sage Premium Accounting for Construction 2009	Sage Entrepreneur Premium	Sage Pro ERP
Peachtree by Sage Premium Accounting for Distribution 2009	Sage Entrepreneur Premium with Payroll Services	Sage SalesLogix
Peachtree by Sage Premium Accounting for Manufacturing 2009	Sage Entrepreneur Pro	Sage SalesLogix Mobile
Peachtree by Sage Premium Accounting for Nonprofits 2009	Sage Entrepreneur Pro with Payroll Services	Sage SalesLogix Visual Analyzer
Peachtree by Sage Pro Accounting	Sage e-Prescribe	Sage SmartPace
Peachtree by Sage Quantum	Sage ERP X3	Sage SOLION
ProvideX	Sage FAS Fixed Assets	Sage Timberline Office
Sage Abra SQL HRMS	Sage FAS Gov Fixed Assets	Sage TimeSheet
Sage Abra Suite	Sage FAS Nonprofit Fixed Assets	Sage Transaction Services
Sage Accpac ERP	Sage Fundraising	Sage Vault
Sage Active Planner	Sage Fundraising 50	Sage Virtual Terminal
Sage Business Capital	Sage Fundraising 100	Simply Accounting by Sage Accountants' Edition 2009
Sage BusinessVision Accounting	Sage Fundraising 100–Rainbow Edition	Simply Accounting by Sage Enterprise 2009
Sage BusinessWorks Accounting	Sage Gateway	Simply Accounting by Sage First Step 2009
Sage Card Processing	Sage Gift Card	Simply Accounting by Sage Premium 2009
Sage Carpe Diem	Sage HealthPro XL	Simply Accounting by Sage Premium 2009 with Payroll Services
Sage Collect Direct	Sage Integrated Payments	Simply Accounting by Sage Pro 2009
	Sage Intergy	Simply Accounting by Sage Pro 2009 with Payroll Services
	Sage Intergy CHC	Timeslips by Sage
	Sage Intergy EHR	

## Sage product naming conventions

Please consult the *Sage product descriptions* document for product- and module-specific usage rules and examples.

# Appendix B:

## Press release approval process FAQ

### Note:

All press releases mentioning Sage should be sent to the Sage PR team for review prior to distribution. The following FAQ will help explain the review and approval process.

### Q: How can I gain press release approval from Sage?

**A:** Once you've added your company-specific information to the appropriate press release template found under Marketing and then Public Relations at [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) – or written your own press release announcing news related to both Sage products/services and your company– e-mail it in Word format to the PR manager representing the product about which you are writing, so the approval process can begin. You can find contact information at this link: [http://sagesoftware.com/newsroom/media\\_contact.cfm](http://sagesoftware.com/newsroom/media_contact.cfm)

### Q: How long does it take to gain approval from Sage for my press release?

**A:** Because each press release goes through a thorough review cycle within Sage, we recommend allowing 7 to 10 business days for it to be reviewed. It may take less time, but should not take more time to complete the review. A Sage PR manager will keep you updated on the status of your press release approval.

### Q: Who will review my press release?

**A:** The PR manager will share your announcement with the appropriate corporate, channel, and product executives.

### Q: What is “boilerplate” information? Do I need to have it?

**A:** A “boilerplate” refers to the information you see at the end of a press release, usually under the header, “About (Company Name).” It is called a boilerplate, because it doesn't change, or at least changes infrequently, when it is updated to reflect the most current information concerning your business. Boilerplate copy is not required in a press release, but it is helpful, as it provides basic information about your company for the reader.

The Sage boilerplate information is included at the end of all releases distributed by or about Sage. It is updated frequently, along with many other PR tools and templates. You may use the Sage boilerplate in your release only in the case of a joint announcement with Sage. If you are given permission to use the Sage boilerplate in your press release, the PR manager you work with can help ensure you have the most up-to-date version of the boilerplate.

**Q: If I am issuing a press release that involves Sage, how do I get a quote from someone there to use in my press release?**

**A:** Several of the press release templates posted at [www.sagepartnermarketing.com](http://www.sagepartnermarketing.com) already include an approved quote from a Sage executive.

If you are interested in securing a supporting quote for a press release that does not currently have a template on the Channel Marketing Web site, please send a draft of your proposed press release in Word format to the PR manager representing the product about which you are writing, so the approval process can begin. You can find contact information at this link: [http://sagesoftware.com/newsroom/media\\_contact.cfm](http://sagesoftware.com/newsroom/media_contact.cfm).

If you have a suggested quote, please include it in the draft. Otherwise, please insert a placeholder and we will provide an appropriate quote and spokesperson for you.



**Sage North America**  
56 Technology Drive  
Irvine, CA 92618-2301  
800-854-3415  
[www.sagenorthamerica.com](http://www.sagenorthamerica.com)

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**Sage North America**

56 Technology Drive  
Irvine, CA 92618-2301  
800-854-3415

[www.sagenorthamerica.com](http://www.sagenorthamerica.com)

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