

E-book

Cloud Accountants Loyalty Program FY23

Sage



Cloud Accountants

Loyalty Program FY23.

Sage is committed to every Accountant's success and investing in the supporting resources for practices to achieve growth goals.

By working together, we can maximise our level of mutual success, and create wins for your customers, your practice and Sage.

Today's progressive Accountants are offering their customers so much more than monthly financial statements and tax returns. Cloud technology enables Accountants to elevate their services from basic transactional work to high-value, full-scale outsourced accounting.

Sage recognises the need for practices to transform with cloud technologies and the Sage Accountants Loyalty Program has been designed to reward those who display their commitment to Sage and its cloud offerings.

The rewards include free licences and discounts to Sage software and best-of-breed cloud technology to support your practice, participation in exclusive events, access to specialists to support you and your practice, and much more.



Benefits and rewards

| | Adviser | Authorised | Silver | Gold | Platinum |
|---|---------|------------|--------|---------|----------|
| Qualifying Customer Count | 0-9 | 10-49 | 50-99 | 100-199 | 200+ |
| Earn Rebates | 0 | 25% | 30% | 35% | 40% |
| Priority Telephone Support | | ✓ | ✓ | ✓ | ✓ |
| Find an Accountant (listing)* | | ✓ | ✓ | ✓ | ✓ |
| Free Sage Licences | Adviser | Authorised | Silver | Gold | Platinum |
| Unlimited Accountant Edition Users | ✓ | ✓ | ✓ | ✓ | ✓ |
| 1 x Base Company | ✓ | ✓ | ✓ | ✓ | ✓ |
| 1 x Multi-Currency | ✓ | ✓ | ✓ | ✓ | ✓ |
| 1 x Time Tracker | ✓ | ✓ | ✓ | ✓ | ✓ |
| 1 x Advanced Inventory | | | ✓ | ✓ | ✓ |
| 1 x Debtors Manager | | | ✓ | ✓ | ✓ |

To be listed on the 'Find an Accountant' site, the following criteria must be met:

- Must be registered with a professional body for Accountants.
- Must have a company website and ensure that the website contains reachable contact details.
- Require advertising Sage on your social media platforms at least once a quarter.
- Require displaying the Sage Accountants Logo on your website.

| Sage Exclusive Services | Adviser | Authorised | Silver | Gold | Platinum |
|---|---------|------------|--------|------|----------|
| Dedicated Practice Success Manager | | ✓ | ✓ | ✓ | ✓ |
| Hosted Client Engagement | | | | ✓ | ✓ |
| Assisted Digital Enablement | | | | ✓ | ✓ |
| Exposure on Sage Communities | | | | ✓ | ✓ |

Hosted Client Engagement

Co-branded and co-hosted virtual events for your practice and your clients.

From new feature releases, to onboarding new clients and helping you to migrate your clients to cloud – Sage will work with you to deliver meaningful events for your clients.

Assisted Digital Enablement

For Accountants with little or no marketing experience, our dedicated Cloud Accountants team will create quarterly plans with you and provide guidance to ensure that your practice has the digital exposure needed to attract new clients.

Exposure on Sage Communities

Events and activities occur from time to time and our top-performing Accountants who are experts in their field, will be provided the opportunity to participate in many ways. From submitting thought leadership articles, to participating at events – this is an opportunity for our top-performing Cloud Accountants to contribute and place their brand in front of others.



Targets and Rebates per Tier

The tier is determined by the total number of active companies under your profile, as well as active companies you are invited to. Please refer to the Cloud Accountants Program guide for more information on targets required for each status tier, and criteria to earn rebates.

Discounted Rates on App Partners

These cloud-based applications that have a direct integration with Sage Accounting, have been identified as best-of-breed for accounting firms.

Our Partnerships with these Application Partners allow us to reward you with either vouchers, sponsored licences, or free access depending on your status.

| | Adviser | Authorised | Silver | Gold | Platinum |
|---|---------|------------|--------|------|----------|
| Draftworx (Sponsored vouchers) | - | ✓ | ✓ | ✓ | ✓ |
| Syft Analytics (Sponsored licences) | - | | ✓ | ✓ | ✓ |
| AutoEntry (Sponsored licences) | - | ✓ | ✓ | ✓ | ✓ |
| CaseWare (Sponsored licences) | | ✓ | ✓ | ✓ | ✓ |

Please note: Program can be amended or changed without notice.



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