

# Sylogist Reseller Partner Program Guide

August 2024

## About Sylogist

Sylogist (Toronto Stock Exchange - symbol: SYZ) is a global provider of software platforms for the NPO & NGO, Education, Local Government and Corporate sectors.

Sylogist offers a suite of integrated financial, operational, and customer relationship management (CRM) software products that provides the tools and functionality its customers need to accomplish their organizational missions. Sylogist's own mission includes delivering peace-of-mind and exceptional service to organizations by building robust, innovative, and highly functional software solutions backed by outstanding support and services.

Sylogist products are trusted by >2,000 customers globally and we are a Partner oriented ISV who works with a global network of Partners who sell, implement, configure, and support customers using Sylogist technology.

We view our partner community as an ecosystem, recognizing that every partner type is valuable and necessary to maintain the balance of that ecosystem. As a vendor, we believe it is our responsibility to provide competitive pricing and partner enablement to ensure our partners have the tools and resources they require to address a customers' needs.

Partners can choose to become certified on specific products such that they achieve a level of proficiency to sell, implement and support the product. Alternatively, partners who are not certified on a product can refer leads to Sylogist where our team of experts does the selling, implementation, and support.

This Guide outlines the Sylogist Reseller Partner Program. Partners choosing to participate in this program must agree to the **Sylogist Reseller Partner Agreement**.

Together, Sylogist and its partner community are dedicated to providing exceptional ROI to one another and our customers.

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## World-Class Products & Certification

Partners are able to become certified on the SylogistMission, SylogistGov, SylogistEd, Mission CRM, Payroll by Sylogist, Savin and The Portal Connector platforms. Certification is available to all partner staff members who complete certification training and a certification exam for any of our products. Once certified on a product, the partner is considered a Reseller Partner (Tier 1 or Tier 2 – see below).

A Reseller Partner remains certified to resell and implement a specific product if they employ staff who have successfully completed product certification training (implementation, sales, and support) for that product.

A partner that is not certified can refer leads for any product as part of the Sylogist Referral Partner Program.

## Partner Compensation Structure

Sylogist offers a generous partner commission on software subscriptions that enables partners to earn revenue on a one-time or ongoing basis.

Reseller Partner Commission Levels for New Sales		
Product	Tier 1	Tier 2
SylogistMission ERP	20%	30%
Payroll by Sylogist	20%	30%
SylogistGov	20%	30%
SylogistEd	20%	30%
SylogistMission CRM	20%	30%
The Portal Connector	20%	30%
SAVIN	20%	30%

**Tier 1:** Reseller Partners with less than 3 sales of new Sylogist products will receive this level of commission ongoing as long as the partner is managing that customer.

**Tier 2:** Reseller Partners with 3 or more sales of new Sylogist products will receive this level of commission ongoing as long as the partner is managing that customer.

Sylogist provides partners with the Suggested List Price (SLP) for each product. Partners have some discretion to set their own Customer prices. Any Customer discounts or premiums provided by the partner will in no way alter or affect the total amount due to Sylogist.

A partner that is certified as a Reseller Partner for specific products, can still refer prospects for products that they are not certified in and will receive either: 1) a one-time commission on 1<sup>st</sup> year subscription fees for leads that convert to new Sylogist customers. Or, 2) a discount for their customer on 1<sup>st</sup> year subscriptions fees.

Details of the Referral Program are available by signing Sylogist’s Referral Partner Agreement.

Commission paid to partners for any historical or existing Sylogist Customers will remain at the historical commission rates for these pre-existing Sylogist products.

## Sales Enablement

Sylogist is dedicated to helping Partner succeed with comprehensive pre-sales assistance as well as with marketing resources & support.

## Pre-Sales Assistance

As a partner, Sylogist will support your sales efforts by providing:

- **Product Tours** – 45–60-minute mini-demos of our products to qualified prospects. These tours succinctly highlight what a specific product does and its unique capabilities that differentiate it from your competition.
- **Product Demos** – when your customer is at the point of evaluating the solution details, we have product experts to work with your team to present in depth product demos to help you close the deal. Demos are available upon request for qualified prospects in the final stages of decision making.
- **RFP Review** – upon request, we will address questions as your team prepares proposals. We help to ensure that you are in a strong position to win more deals.
- **Sales Materials** - Sylogist will provide a full range of materials to help you better market and promote Sylogist products including proposal templates, pricing sheets, sales .ppt slides, RFP response template & guide, etc.

It is expected that partners will become proficient and less dependent upon Sylogist sales assistance over time.

## Marketing Resources & Support

Marketing support includes programs and resources to support your go-to-market initiatives and assist Sylogist partners in increasing market exposure. Upon request, we work with each partner to help define a marketing plan specific to each partner. Marketing initiatives can include:

- **Sylogist Website presence** – Logo, link, and summary
- **Marketing Webinars** – Sylogist hosts webinars that can be co-presented with partner experts, and we will also provide both content and presenters at partner led webinars
- **Conference Participation** – Sylogist may participate in partner led conferences. Let us know your conference schedule!
- **Marketing Materials** – Sylogist will provide a full range of materials to help you better market and promote Sylogist products including sell sheets, content, logos, and images for your website, promotional email templates, demo scripts, product videos, case studies and other partner marketing materials as available.
- **Lead Generation** – Sylogist engages in marketing campaigns and efforts to create awareness and generate leads. Sylogist forwards leads to Partners who are well matched to sell and support the opportunity.

In addition, Sylogist invests in marketing efforts and campaigns to promote its brand and products and to generate awareness and leads for partners.

## World-Class Partner Support

Sylogist is dedicated to helping our partners provide outstanding customer support. Reseller Partners provide the first line of support for their customers. As first line support, Partners directly address customer questions about using and configuring Sylogist products.

Sylogist is the second line of support for the partner and provides a support ticketing system where a partner can log and track support tickets. Sylogist will support Partners with questions that are related to product issues or defects. All other support will be available at standard support hourly rates and as requested by the Partner.. The Sylogist Help Desk is available from 8:00am-7:00pm ET and responses are typically provided within 24 hours.

Support tickets are created by emailing tickets to:

Payroll by Sylogist: supportPR@sylogist.com  
SylogistMission ERP: supportMissionERP@sylogist.com  
SylogistGov: supportgoverp@sylogist.com  
Portal Connector: supporttpc@sylogist.com

Sylogist provides a high level of partner support that is accessible, expert and always willing to help.

## Knowledge Center

Sylogist provides a comprehensive Knowledge Center for all partners and their customers. This Knowledge Center includes:

- Extensive video tutorial library that is well organized, comprehensive, and kept up to date. It enables partner and customer staff to learn the system and stay current on essential product knowledge.
- Certification training video sessions. These training videos are recordings from product certification training and are perfect for new staff looking to become certified.
- Product update information and release notes.
- Sales, marketing and implementation tools and templates.
- Product price sheets.
- Customer access to the Knowledge Center is available to all of your customers as a resource for learning the platform and using it to its fullest potential.

## Partner Training & Onboarding

Our team makes the process of learning Sylogist easy.

### Partner Training:

Sylogist is committed to the certification training and ongoing education of our partners. For all Sylogist products, the following training is available and required for a partner to become certified on the products they wish to sell, implement and support:

- **Product Certification Training:** Comprehensive product training aimed at a partner's consultants, implementors, account managers and support staff who will be highly engaged with the product and customer delivery, configuration, and support.
- **Sales Training:** Training for partner sales, marketing and account management staff that helps your team make more sales.

- **Support Training:** Training for a partner's support and help desk team to ensure that they understand their role as 1<sup>st</sup> tier support, how to diagnose and resolve issues, how to create and track tickets in Sylogist's issue tracking system.
- **Custom Training:** Should your team want or need additional training or training tailored to needs, we are here to help and we can create training engagements that are specific to your requirements. These sessions are custom engagements that are charged for at an hourly rate.

## Initial Engagements

Sylogist works closely with partners on their initial engagements to ensure that the customer has a smooth and successful integration that it is an effective training opportunity for the partner. The initial engagement teamwork is tailored to each partner and their expertise to ensure that they immediately become proficient and able to perform and bill for services. Our assistance with post-sales activity is designed to ensure initial project success and high levels of customer satisfaction in a manner that works for each partner.

## Demo Environment & Not-for-Resale (NFR) Access to Products

Sylogist products that a partner is certified to resell and implement will be made available to partners as part of the partner program fee for demonstration, testing and development purposes. Some products may require Microsoft subscriptions, for demonstration, testing and development purposes. If a Partner becomes certified on these products, Sylogist will provide licenses (1 Essential and 1 Team) during the first year as part of the Partner Program Fee once paid and then ongoing as long as the partner maintains minimum new sales levels of at least one new sale per year for each product where Sylogist covers the license cost.

## Partner Sales, Marketing, and Demand Generation

The most successful Sylogist partners actively market, promote and sell the Sylogist products for which they are certified. These marketing and promotional efforts are up to each partner and may include efforts such as:

- Promotion of Sylogist as a partner on your company's website including display of the Sylogist logo, product summary and link to Sylogist's website.
- Promotion of Sylogist at conferences, tradeshows, and exhibitions that you attend.
- Promotion of Sylogist product offerings to your current customers and prospective customers via email, on social media and other methods.
- Collaborate with Sylogist to run online events or webinars to your customers and prospects in conjunction with Sylogist.

Sylogist will assist and contribute to the partner's planning efforts to ensure that we each have visibility and alignment on the plan, execution, and results. As part of this commitment to our Partner's success, Sylogist provides a dedicated Partner Manager who serves as primary liaison for Sylogist.

**Lead Registration:** We track partner prospects to ensure that they are properly recognized and tracked in our system such that we have to help you succeed with each opportunity.

Partners will notify Sylogist of a prospective Customer in writing via email or partner web form. If the Prospective Customer has already been engaged by Sylogist or other partner then Sylogist will notify the Reseller Partner of this as soon as reasonable.

**Partner Check-Ins:** Sylogist and Partners meet regularly (and no less than annually) to review and discuss the partner's business plan, needs, results, and plans for the period ahead. Together, Sylogist and Partners map out the plan for mutual success based upon these check-ins.

#### Partner Briefings & Updates

Sylogist runs regular video-based partner briefings to keep partners updated and informed on:

- Product updates and road map
- Important Sylogist updates and events
- New products
- Information on sales and marketing initiatives and campaigns

## Services Revenue

As a certified partner, Sylogist products offer an outstanding opportunity to perform and bill for services to generate revenue. As a Partner, you can quote and bill for services that you provide directly to your customers. The partner provides these services and is entitled to the revenue generated.

A partner may request Services assistance from Sylogist where members of the Sylogist team perform specific services required by a customer as identified by the Partner. In such cases, Sylogist will provide a discounted services rate (typically 20%) to the partner who can markup the fee to the customer should they desire.

Sylogist may, from time to time, look to engage certified partners in providing specific services work for Sylogist customers where there is alignment with the partners capabilities, availability, and bandwidth to provide such services. In these cases, Sylogist will provide a statement of work (SOW) to the partner for each specific engagement that outlines the scope of work, fees, timelines and other specifics-central to the successful delivery of the engagement.

## Partner Program Fees

The Sylogist Partner Program fee is a 1-time fee that is used in the initial onboarding, training, support, and education of members of the Partner’s team. The payment of this fee is deferred until the Partner submits their first order such that it aligns with the Partner’s revenue. This enables Partners to sign up and get started with training and working with the Sylogist team to start building a prospect pipeline.

Sylogist is committed to our partner’s success and invests heavily in each new partner to ensure that they are trained and well supported in each area of each product they represent. Details of the partner fee and inclusions are outlined below

Program fee	Inclusions
<b>\$3,000 (one-time fee)*</b>	<ul style="list-style-type: none"> <li>• Access to sell SylogistMission (ERP &amp; CRM), Payroll by Sylogist, SylogistGov, SylogistEd, The Portal Connector and products as certified</li> <li>• Initial sales, implementation and support training and certification exam for sales &amp; implementation for unlimited staff within 12 months of program enrollment</li> <li>• Access to Knowledge Center</li> <li>• Assistance on initial implementations</li> <li>• Help desk support training</li> <li>• Joint business plan development</li> <li>• Opportunity assessment guidance</li> <li>• Demo support</li> <li>• Partner briefings</li> <li>• Includes demo environments for partners certified as specified in this Guide</li> </ul>

\*Currency based upon Partner headquarters location.

## Taxes

The amounts to be paid to us under this Agreement do not include any applicable federal, state, provincial, local, municipal, or other governmental taxes (including goods and services or value added taxes), duties, levies, fees, excises or tariffs, arising as a result of, or in connection with, the transactions contemplated under this Agreement.

You must pay to us any applicable value added, goods and services, sales or use taxes or like taxes that are owed by you solely as a result of entering into this Agreement and which are permitted to be collected from you by us under applicable law. You may provide to us a valid exemption certificate in which case we will not collect the taxes covered by such certificate. We are not liable for any of your taxes that you are legally obligated to pay which are incurred or arise in connection with or related to the sale of goods and services under this Agreement or your resale, and all such taxes (including net income or gross receipts taxes, franchise taxes, and property taxes) are your financial responsibility.

If any taxes are required to be withheld on payments made by you to us, you may deduct such taxes from the amount owed to us in accordance with applicable law and pay them to the appropriate taxing authority; provided, however, that you shall promptly secure and deliver to us an official receipt for any such taxes withheld or other documents necessary to enable us to claim a Canada or U.S. foreign tax credit. The withholding taxes referred to in this section apply only to withholding taxes required by the taxing authorities on payments to us, and do not include any withholding taxes applicable to you for payments made to you by your Customers which are your financial responsibility.

## Multi-year Terms

Sylogist price quotes will be for multi-year contract terms, typically 3 to 5 years in duration. We believe this to be in the best interest of all parties. For all such multi-year term contracts, the customer's financial commitment for the subscription is for the entire Term of the Order. If at any time, and for any reason, customer discontinues its use of the product or does not make all payments that are due, Partner shall use commercially reasonable efforts and act in good faith to have the customer pay any unpaid amounts remaining under this Agreement, including those amounts that are due to Sylogist.



## Product Specific Exhibits

### SylogistGov Exhibit.

1. Roles. SylogistGov ERP is a fully embedded solution powered by Microsoft's Business Central. As such, Sylogist is the Cloud Service Provider (CSP) of licenses and is the VAR of Record with Microsoft. All licenses are ordered through Sylogist. The Partner is the Consultant of Record with Microsoft.
2. It is recommended that all Tier 1 & 2 partners have 1 Essential and 1 Teams license for the purposes of testing, training doing demonstrations. Upon written request, these licenses will be made available and included to tier 1 and 2 partners in year 1 as part of the Partner Program Fee, once paid. These licenses will be provided by Sylogist in all future years provided that the Partner has sold at least 1 new SylogistGov customer in the prior 12-month period. Otherwise, SylogistGov ERP licenses may be purchased by the Partner for 50% of the published list price.

### SylogistMission ERP Exhibit.

1. Roles. SylogistMission ERP is a fully embedded solution powered by Microsoft's Business Central. As such, Sylogist is the Cloud Service Provider (CSP) of licenses and is the VAR of Record with Microsoft. All licenses are ordered through Sylogist. The Partner is the Consultant of Record with Microsoft.
2. It is recommended that all Tier 1 and 2 partners have 1 Essential and 1 Teams license for the purposes of testing, training doing demonstrations. Upon written request, these licenses will be made available and included to tier 1 and 2 partners in year 1 as part of the Partner Program Fee, once paid. These licenses will be provided by Sylogist in all future years provided that the Partner has sold at least 1 new SylogistMission ERP customer in the prior 12-month period. Otherwise, SylogistGov ERP licenses may be purchased by the Partner for 50% of the published list price.

### Payroll by Sylogist Exhibit.

1. Partners will receive 20% recurring license revenue of any customer licensed before May 1, 2019
2. Partners will be requested to create an account with the payment provider, Stripe. Sylogist and Partner Stripe accounts will be linked, by Stripe, to enable Sylogist to initiate transactions on the partner's behalf. Monthly automated transactions will be processed, in the following manner:
3. Withdraw from customer account/credit card and deposit to Partner Account the amount based on:  
(Employee Count X Customer Rate\*) + Tax
  - i. \*Customer Rate = Partner to-customer pricing
4. Withdraw from Partner account and deposit to Sylogist account the amount based on: [(Employee Count X Applicable Price List Rate) – Partner Margin] + Tax
5. Partners may use Payroll by Sylogist for their internal use and payroll.
6. Monthly subscription fee is due no later than the 5<sup>th</sup> day of every month in which employees are processed.

7. Pre-payments on Subscription licensing beyond one (1) month are final and non-refundable. If a monthly Subscription license is cancelled, the Partner is responsible for payment for the entire final month of service.
8. Multiple monthly invoices may be generated in cases where additional employees are added to a month in which the fee collection process has been completed. (i.e. Back-dating a check for an employee that was missed or using the manual fee collection process before the automated process initiated).
9. If a multi-year term is chosen, the customer's financial commitment of the Payroll by Sylogist PPU subscription renewal is for the entire Term of this Agreement. For purposes of calculating the final PPU Subscription invoice, Sylogist shall use the average number of employees across the completed period of the Term to calculate the amount due for the remaining period of the Term.