

Sage Investment Protection Program

Frequently Asked Questions



This document answers frequently asked questions from customers and partners about migrating from one Sage ERP Mid-Market product to another.

What is the Sage Investment Protection Program?

Sage wants to keep you in the Sage family and help you protect the investment that you have already made into your Sage ERP products. The Sage Investment Protection Program (SIPP) allows customers to receive a per-user trade-in credit for their old Sage ERP licenses. This credit can be applied against the purchase of user licenses for a new Sage ERP solution.* However, this trade-in credit amount decreases over time, which means that the longer you wait, the more it will cost you to migrate.

Perpetual License	October 1, 2012 through September 30, 2013	October 1, 2013 through September 30, 2014
Sage BusinessWorks Sage BusinessVision Sage PFW ERP Sage Pro ERP On-Plan Customers	\$1,500 per user Trade-In Credit	\$1,000 per user Trade-In Credit
Sage BusinessWorks Sage BusinessVision Sage PFW ERP Sage Pro ERP Off-Plan Customers	\$750 per user Trade-In Credit	\$500 per user Trade-In Credit
Sage 500 ERP On-Plan Customers	\$2,000 per user Trade-In Credit	\$2,000 per user Trade-In Credit
Sage 500 ERP Off-Plan Customers	\$1,000 per user Trade-In Credit	\$1,000 per user Trade-In Credit

Subscription License**	October 1, 2012 through September 30, 2013	October 1, 2013 through September 30, 2014
All eligible On- and Off-Plan Customers	\$50 trade-in credit per user/per month for two years max.	\$25 trade-in credit per user/per month for two years max.

* Per-user trade-in credit cannot exceed the per-user license cost of the destination product. Trade-in credit for perpetual pricing applies to per-user pricing for applicable Financials, Distribution or Manufacturing bundles only. Trade-in credit cannot be applied toward products with module-based (à la carte) pricing.

** For migrations from Sage 500 ERP to subscription licenses for Sage 300 ERP, the trade in credit will remain \$50 per user/per months until September 30, 2014. A subscription migration offer to Sage ERP X3 will be made available once the upcoming Sage ERP X3 subscription pricing has been released.

Which Sage products are included in the Sage Investment Protection Program?

Under the Sage Investment Protection Program (SIPP), Sage customers can migrate to the following Sage ERP products:

From	to Sage 100 ERP	to Sage 300 ERP	to Sage ERP X3
Sage Pro ERP	✓	✓	✓
Sage PFW ERP	✓	✓	✓
Sage 500 ERP	✓	✓	✓
Sage BusinessVision	✓	✓	✓
Sage BusinessWorks	✓	✓	✓

Customers of SBT, Accpac Pro, BatchMaster, Platinum, and VisionPoint are included into the group of Sage Pro ERP customers for this special offer. Please contact your partner if you have questions about your eligibility.



When should we move to another Sage ERP solution?

The timing of moving to a new software solution is unique to each business, and there are many things to consider. For example, you will want to consider staying on plan to receive all the remaining product updates, so that your business continues to operate smoothly while you investigate which Sage ERP product is the best choice for your company.

You may also want to consider migration as soon as possible to take advantage of the highest trade-in credit through the Sage Investment Protection Program. Sage recommends that you work closely with your business partner to evaluate your needs and determine the best way to meet them.

How do I find out about other Sage product solutions and offers available to me?

If you are not familiar with Sage Mid-Market ERP solutions, we would like to invite you to our monthly product overview webcast. We will provide you with an executive overview of some of the functionality found in our other Sage ERP products, such as Sage 100 ERP, Sage 300 ERP, and Sage ERP X3. Find out which Sage ERP solution will fit your evolving business requirements. [Register Now](#)

What are the Sage Business Care Plan requirements for migrating customers?

For migrating customers purchasing subscription licenses to another Sage ERP product, the Sage Business Care Gold support plan is bundled as part of the subscription license.

For migrating customers purchasing perpetual licenses to another Sage ERP product, the purchase of a Sage Business Care Gold support plan is required. However, under the Sage Investment Protection Program, Sage will only charge you the price of a Sage Business Care Silver plan for the first year. After the first year, the regular Gold plan renewal price will be in effect.

Are there any third-party product discounts for migrating customers?

Yes, some of our independent software vendors have made special offers available to customers migrating under the Sage Investment Protection Program. A list of these partners and their offers can be found in Appendix 1 at the end of this document. Please verify pricing and conditions of these offers with your Sage business partner, or directly with the third-party providing the offer.

More information and resources

To help our customers decide which Sage ERP solution is the best choice for their specific needs, we have put together a collection of resources to assist you in your research.

The Sage Investment Protection Program

- for [Sage Pro ERP customers](#)
- for [Sage PFW ERP customers](#)

The Sage Mid-Market portfolio of ERP solutions

- [Sage 100 ERP](#)
- [Sage 300 ERP](#)
- [Sage ERP X3](#)

- [Monthly Product Overview Webcast](#)

Who do I contact if I have more questions?

In addition to talking to your business partner, you may call Sage at 1-888-760-0947. If you do not have a current Sage business partner, we can put you in direct contact with a local partner who is experienced in migrating Sage ERP solutions.

Appendix 1

Offers from Independent Software Vendors

Sage KnowledgeSync is a Business Activity Monitoring (BAM) solution from Vineyardsoft Corporation that monitors your ERP data for critical, time-sensitive information, such as overdue invoices, stock shortages, and clients who have changed their buying habits. When such conditions occur, Sage KnowledgeSync sends out alerts through a wide variety of devices and methods, including email, fax, cell phone, instant message, dashboard, and Twitter.

Discount for On-Plan Customers	Oct. 1, 2012 through Sept. 30, 2013	Oct. 1, 2013 through Sept. 30, 2014
Sage KnowledgeSync Enterprise Edition Perpetual License	\$1,299 license discount	\$ 799 license discount
Sage KnowledgeSync Enterprise Edition Subscription	50% per-user 24-month discount	25% per-user 24 month discount

Discount for Off-Plan Customers	Oct. 1, 2012 through Sept. 30, 2013	Oct. 1, 2013 through Sept. 30, 2014
Sage KnowledgeSync Enterprise Edition Perpetual License	\$649 license discount	\$ 399 license discount
Sage KnowledgeSync Enterprise Edition Subscription	50% per-user 24-month discount	25% per-user 24 month discount

Restrictions may apply. For more details on this offer, please contact [Vineyardsoft](http://Vineyardsoft.com) at Info@Vineyardsoft.com or call 1-800-850-8055 for Donald Farber (ext. 113) or Tricia Cate (ext. 123).



INDUSTRIOS is a powerful manufacturing solution from INDUSTRIOS Software that integrates with Sage 300 ERP and Sage PFW ERP. For discrete manufacturers in make-to-order, make-to-stock, assemble-to-order, configure-to-order, and mixed mode environments, INDUSTRIOS has the tools to manage raw materials, sub-assemblies, WIP, and finished goods.

INDUSTRIOS Software is offering a discount on its core system to help customers transitioning to Sage 300 ERP and provide them with the manufacturing strength they need.

Discount for On- and Off-Plan Customers	Oct. 1, 2012 through Sept. 30, 2013	Oct. 1, 2013 through Sept. 30, 2014
On-Plan Sage Customers	\$ 9,499 license discount	\$ 9,499 license discount
Off-Plan Sage Customers	\$ 9,499 license discount	\$ 9,499 license discount

Restrictions may apply. For more information on this offer, please contact **INDUSTRIOS** at Sales@Industrios.com, or call 1-866-275-9028. You can reach Dan Court at 905-829-2525 x252, or Paul Shantz at 905-829-2525, x280.

