SAGE (UK) LIMITED
CERTIFIED SOLUTION PROGRAMME

TECHNICAL REQUIREMENTS

REVISED 17th June 2011

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INTRODUCTION

Sage (UK) Limited offers a Certified Solution Programme for both packaged software applications and custom solutions. Companies with certified products enjoy enhanced marketing cooperation with Sage, and Sage Certified Solutions provide an enhanced level of consistency, predictability, and confidence to Customers, Developers, and Business Partners alike. Purchasers and implementers of Sage Certified solutions can be assured they follow certain minimum standards and have passed certain minimum tests for installation and functionality—and that testing has been accomplished at an independent agency. Over time, the Sage Certified Programme will dramatically reduce technical support issues and raise the "certainty" bar within the Sage ecosystem.

Certification testing is provided by the VeriTest service of Lionbridge, the world's largest and best-known software product testing authority. VeriTest has certified tens of thousands of products on behalf of major certification programs, including Certified for Microsoft® Windows®, Microsoft Windows Server, and many others. Lionbridge has more than 45 offices in 25 countries, and is one of the world's leading development, localisation, and testing organisations, offering a broad range of services.

TESTING INSTRUCTIONS AND QUESTIONS

Further information and testing instructions are available at www.lionbridge.com/sageuk

You may contact VeriTest at sagecertlab@lionbridge.com

Alternatively, Sage Developer Services may be contacted on 0845 1117733 or at developers.programme@sage.com

SOLUTIONS COVERED BY THIS DOCUMENT

The programme presently covers only solutions integrating with either or both of:
- Sage Instant Accounts
- Sage 50 Accounts

Please note: solutions tested with Sage 50 Accounts will also be listed as certified for Sage Instant Accounts.

Requirements will be released for additional Sage (UK) Limited products at a later time.

REQUIREMENTS

Products seeking the "Sage Certified" logo must meet the following basic requirements, and

    a) Complete testing through VeriTest, a service of Lionbridge Technologies

    b) Complete a "Certification Statement" to be made available to End-Users

1. GENERAL REQUIREMENTS

1.1.   Partner must be a member of the Sage Developers Programme with a Professional Subscription to apply for, and maintain Sage Certified Solution status. The service range of membership must also cover the Sage product for which certification is required.

1.2.   Partner must promote the solution in Sage Additions – directory of integrated solutions from the Sage Developer Community.

1.3.   Partner must provide five references with customer name and contact information. These must be customers who have purchased and installed the specific solution to be certified.

1.4.   Partner must maintain high levels of customer satisfaction:

        1.4.1.   Customer and Business Partner complaints will be investigated by Sage.

        1.4.2.   A pattern of customer complaints or dissatisfaction with Partner solution may be grounds for termination of Certified Solution status.

1.5.   Partner will publish its return policy. Partners are encouraged to offer a return policy at least as liberal as the Sage policy of the associated product line.

2. PRODUCT SUPPORT

2.1.   Partner will publish its support policy, including contact information (support phone number, e-mail address, etc.), days and hours of operation, and typical response time for customers inside and outside of the UK.

2.2.   Partner will provide technical support to customers in a manner consistent with current industry norms. At a minimum:

        2.2.1.   All support incidents must be acknowledged within one business day.

        2.2.2.   A pattern of customer complaints or dissatisfaction with support quality, timeliness, or availability may be grounds for termination of Certified Solution status.

2.3.   If Partner is located outside of the UK, or is located in the UK but markets products to customers outside of the UK, Partner must have a documented plan for providing these customers with satisfactory support.

2.4.   Partner will designate a point person for Sage Support to contact when handling escalated support cases.

2.5.   Partner must actively participate with Sage and the Business Partner on resolving product and customer related issues.

2.6.   In the event of a dispute, Partner agrees to Sage arbitration between Solution Partner, Business Partner, and customer.

3. VERSIONING

3.1.   **SAGE PRODUCT VERSIONS:** To be certified, Partner solutions must support the current shipping version of the Sage product line. Certification is not available on earlier versions of the Sage product.

3.2.   **RECERTIFICATION:** Certification remains valid for 12 months following a pass result. Solutions require re-certification annually, regardless of the interim history of upgrades and versions of either the Sage or Partner product. If they do not re-certify, partners may only display the Sage Certified logo for 60 days following each product's certification renewal date.

3.3.   **REVISION OF CERTIFICATION REQUIREMENTS:** The requirements for the Sage Certified logo will be revised from time to time by Sage (UK) Limited, however recertification will only be required annually.

3.4.   **THIRD-PARTY SOFTWARE:** Partners must document the inclusion of any third-party software in the Certification Statement (see 10. Documentation). For the purposes of the test, such software will be considered part of the overall solution.

3.5.   **MODULES:** Individual applications and/or major accounting modules sometimes sold separately, but packaged together as a suite, are tested and charged as separate applications, each at the standard rate. In the case of complex applications containing multiple major modules, SKUs, etc., VeriTest will work closely with partner to establish a reasonable price and strategy for overall certification; however VeriTest reserves the right to charge separately for each major module, regardless of how applications are bundled. Please contact VeriTest to discuss your specific solution.

4. PLATFORM CONFIGURATIONS

4.1. **WINDOWS CLIENTS:** Solutions in the Windows Client environment are required to support the most-current versions of Windows 7, Windows Vista, and Windows XP.

4.2. **MOBILE, CLOUD-BASED, PURE-SERVER APPLICATIONS, AND OTHER PLATFORMS:** There are no specific platform support requirements for mobile, cloud-based, or pure-server applications. Such applications, however, are specifically EXEMPT from requirements in Sections 3 and 4, below.

5. INSTALLATION

5.1. **AUTOMATION**: Certified applications must offer automated installation. Installation need not, however, be provided through a single installation program.

5.2. **DOCUMENTATION:** Partner must document pre-installation requirements in user documentation.

5.3. **DEPENDENCIES:** The solution installer must automatically detect dependencies and alert users to conflicts and deficiencies in pre-installed products. This includes checking for the proper version of the Sage (UK) Limited product.

5.4. **RIGHTS:** Installation must require Administrative rights to the platform, but product execution must be available to users.

5.5. **USE PRE-INSTALLS:** Partner must use Sage pre-installed compatible 3rd party integrated and accessory applications, if available.

5.6. **NO UNSUPPORTED:** Partner must not install unsupported 3rd party integrated and accessory applications, and must not overwrite supported products with different versions.

5.7. **INSTALL TO CORRECT FOLDERS:** Applications should be installed to Program Files or the user's AppData folder by default. For per-machine installations, user data must be written at first run and not during the install. Since the install potentially elevates to a different user account during the per-machine install, there is no correct user location to store data at install time.

5.8. **INSTALL WINDOWS RESOURCES PROPERLY:** Applications must not attempt to install files or registry keys that are protected by Windows Resource Protection (WRP). If the application requires newer versions of system components, it must update these components by using a Microsoft Service

Pack or a Microsoft-approved installation package containing the system component. System components must never be repackaged.

5.9. **DO NOT OVERWRITE NONPROPRIETARY FILES WITH OLDER VERSIONS:** The application's installation program must ensure that the latest file versions are installed. Installing an application must never regress any files that you do not produce or that are shared by applications that you do not produce. Replacing such a file with another language version of the same file is equally inappropriate. However, you own the files in your application's folder, and you can overwrite them as you want.

5.10 **WAIVERS:** If installation guidelines are not followed, partner must provide a valid reason for not doing so, and request a waiver from the Sage certification manager.

6. UN-INSTALLATION

6.1. **REQUIRED:** Certified applications must either uninstall via CONTROL PANEL: UNINSTALL A PROGRAM or provide a clearly-documented method for un-installation. An automated un-installer is strongly preferred.

6.2. **NO DAMAGE:** Product must uninstall such that all Sage product modules continue to function without damage.

6.3. **DATA:** Uninstall may leave certain data, in order to maintain Sage stability and audit trails. Data from Sage and third party applications must not be damaged during uninstall.

6.4. **WAIVERS:** In certain cases, Partner may request a waiver for uninstall requirements. Please contact the Sage Certification Manager.

7. OS VERSION CHECKING

7.1. **INCREASED OS VERSION**: An application must not fail to run if the OS version number increases, unless the End-User License Agreement prohibits use on future operating systems. If the application is supposed to fail, it must do so gracefully by sending a message to the user and writing a message to the NT event log.

7.2. **CORRECT API:** Applications must use the version-checking APIs (GetVersionEx) to check the OS version. They MUST NOT read the following the registry keys for the OS version: KEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows NT\CurrentVersion

8. FUNCTIONAL MINIMUMS

8.1. **EXECUTION:** The partner solution must execute appropriately, exhibit stability, and function in accordance with user documentation.

8.2. **SAGE VERSIONS:** Applications should not fail to run with minor upgrades to the Sage platform. If they do not support a later major upgrade, they should fail gracefully, with an error message to user.

8.3. **DEMO:** Partner must provide sample data and a real-time demo to VeriTest personnel. In many cases, this demo can take place over the Web.

8.4. **EXOTIC TEST ITEMS:** If in-lab testing is required at VeriTest, Partner must supply nonstandard/exotic hardware, software and peripherals only when absolutely necessary to perform a real-world test for the typical user profile. These may include such items as handhelds, specialized printers, etc. at partner's cost. Policies and procedures for returning these devices are available at www.lionbridge.com under "Instructions."

8.5. **CHECK DATA/DATA INTEGRITY**: After installation and testing of the third-party application with a substantial pre-existing Sage data set, a 'Check Data' routine must be run from within Sage. In order to verify that data integrity remains intact following the installation/use of the third-party application, the routine should not report any errors/warnings.

9. GENERALLY ACCEPTED ACCOUNTING PRINCIPLES

9.1. Partner must attest (in the Certification Statement) that each certified solution follows generally accepted accounting and taxation principles in the United Kingdom.

10. DOCUMENTATION

10.1. **CERTIFICATION STATEMENT:** Each solution must be submitted with a Certification Statement which covers significant certification criteria not tested by VeriTest. VeriTest will supply a form for this statement.

10.2. **ADEQUACY OF USER DOCUMENTATION:** Certified solutions must provide user documentation with adequate Clarity, Currency, and Completeness for review by VeriTest.

11. PERFORMANCE / CONCURRENT USERS

11.1. **TESTING:** Sage urges all its partner ISVs to test for performance under different loads and numbers of concurrent users, but certification for concurrency is not currently required.

11.2. **STATEMENT:** ISVs will, however, be asked to make a statement about the number of concurrent users supported, as part of the Certification Statement.

12. DEVELOPMENT & ARCHITECTURAL GUIDELINES

12.1 **CREDIT CARDS:** If application directly processes credit cards, it must adhere to the payment card industry data security standard available at https://www.pcisecuritystandards.org/hardware_software/

12.2 **NO DAMAGE:** Product must not damage Sage data integrity. Partner must attest (in the Certification Statement) that the solution does not create data integrity issues with the Sage product.

12.3 **USER CONCURRENCY.** The application must not cause concurrency issues for other users logged into Sage whilst the application is running, including unnecessary waiting/locking messages.

12.4 **DATA CONSISTENCY:** Any elements created within Sage (for example: Invoices, Sales Orders, Credit Notes) using the SDK must be data-consistent with those created through the Sage UI in terms of VAT and rounding. The Check Data tool will verify this consistency in most cases.