

The TimeLinx Certified Consultant Program was developed to ensure that our mutual customers receive a quality implementation that meets or exceeds their needs, is properly installed and configured, results in further work for our partners and future growth (more licenses and recurring support revenues) and minimizes tech support phone calls.

To that end, each consultant that will perform implementation must pass a certification test and pay us an annual fee. The fee covers the administration of the testing, training and support we will provide during the process and each year thereafter for upgrades and new versions. The fee and testing is specific to the CRM platform each consultant is applying for.

**Included in the program is the following:**

- Access to latest version of the core TimeLinx system, including WebCalendar and SmartMobile. Accounting integration is not included in certification or a demo environment. A demo image can be provided for demopurposes.
- 2 Hours of 1-on-1 Web-based Training
- Configuration Setup for Cert Test
- TimeLinx Practical Certification Test
- Installation Documentation
- Product Documentation
- Implementation Resources
  - Training Checklist
  - Template Configuration Worksheet
  - User Configuration Worksheet
  - Selection List Worksheet
  - Client Information Survey
  - Business Requirements Survey
- Five (5) Technical Support Incidents per environment each renewal year

**Certification Process:**

1. Submit the Certified Consultant Program Application to TimeLinx with your annual fee of \$995 USD per CRM platform per consultant.
2. Upon receipt, we will send you the TimeLinx Installation and Configuration documentation, TimeLinx software installation files, a Non-Disclosure Agreement (NDA) to sign and a TimeLinx Support Portal User Name and Password to communicate with TimeLinx Support and Training staff.
3. Create a Ticket in the TimeLinx Customer Portal and provide the information below for us to create your TimeLinx license key. For the purposes of this certification program you will receive a 90-day evaluation license key for 5 full users to be installed to a **non-production** environment of your choosing.
  - a. Sage CRM: Sage CRM license key
  - b. Infor CRM: Infor CRM Customer Number
4. Following the instructions in the documentation, you will perform the installation into your development environment. If you wish to use TimeLinx in your Production environment contact TimeLinx about enrolling in our NFR Sales program.
5. When the installation is complete, update your existing Ticket in the TimeLinx Customer Portal to notify us that you have completed the installation. Our team will set up a web meeting to review your installation and base configuration.
6. When your system is running satisfactorily, per our assessment, we will then provide you with the Certification scenarios to complete.

Initial \_\_\_\_\_

7. You will complete the provided scenarios to the best of your ability. We intend them to be complex and will require you to determine the solutions to all of the scenarios. Our goal is that you will have the knowledge to solve the situations and requirements that customers request of you in a real implementation.
8. When the configuration is complete, update your existing Ticket again in the TimeLinx Customer Portal to notify us that you have completed the configuration. Our team will set up a web meeting for up to 2 hours reviewing how you set up the sample scenarios.
9. When our reviewer feels that you understand the system, and that the information supplied during the training sessions is also understood, your Certification will be complete.

Our goal is successful customer implementations. Should you need assistance please contact us.

*Thank you for your interest and we look forward to your participation in the program.*

## Application

<b>Name of Person to be certified:</b>	_____	<b>Title:</b>	_____
<b>Company:</b>	_____	<b>Web URL:</b>	_____
<b>Street Address:</b>	_____	<b>City:</b>	_____ <b>State:</b> _____
<b>Postal Code:</b>	_____	<b>Country:</b>	_____
<b>Email:</b>	_____	<b>Phone:</b>	_____
<b>Name of Accounts Payable Contact:</b>	_____	<b>Email:</b>	_____

**What Sage or Infor products is your company authorized to resell?**

**What version of Sage CRM or Infor CRM is in your production environment?** Sage CRM - Version: \_\_\_\_\_ Infor CRM - Version: \_\_\_\_\_

Email completed form (both pages) to: [orders@timelinxsoftware.com](mailto:orders@timelinxsoftware.com)

Payment can be made via:

- 1) ELECTRONIC PAYMENT, see payment info at right
- 2) MasterCard or VISA. Please call +1 978 662-1171 for instructions.

I am applying for:

\_\_\_\_\_ Sage CRM Certification \_\_\_\_\_ Infor CRM Certification

**Bank Name & Address:**  
Enterprise Bank  
222 Merrimack Street, Lowell, MA 01852 USA  
**Account Name:** TimeLinx Software, Inc.  
**Account Number:** 606828  
**Routing Number:** 011302742  
**SWIFT Code:** EBTCUS33

Initial Page 1 and sign below agreeing to the terms of the Program.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_