

MEKORMA

A Guide To Partnering with Mekorma

Building interconnected partnerships for
the benefit of our joint clients

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The Mekorma Partner Experience

Welcome to working with Mekorma!

Our favorite work is collaborating with our partners. We want to make you a hero for your clients.

These are our commitments to you:

Reputable Solutions	Our products work; no firefighting!
Universal Solutions	Almost every one of your clients can use our products. When you invest in learning Mekorma, it has an accumulative long-term payoff for your success and their success.
Discovery	Do you want to dive deep to see how our solution would work for a client? We love helping you craft just the right solution.
Tips	We send a quarterly newsletter for clients and another for partners. Each issue informs you of new builds, tips and tricks, and new modules so clients can get the most out of their investment. We will not barrage your client and they can opt out.
Margins	Our subscription products allow you to make long-term cash flow, year after year. The RPS service offering guarantees an additional monthly cash flow. Because our product can be added to every sale, these dollars will add up. See our Partner Profitability Matrix.
Control	Some partners allow SPIFFS, some don't. Some partners allow direct client contact and some want to be involved in every conversation. We do our best to accommodate your needs, strategy, and business practices.
Service Dollars	We will help you capture service dollars by sharing our consulting time matrix with you. See our Partner Profitability Matrix.
Service Augmentation	We engage a top-notch service team when you need to contract out.
Training	Our service team is delighted for your consultants to shadow any implementation you bring to us, ensuring their readiness for the next one.
Reliable Updates	When the ERP is updated, Mekorma product updates too.
Technical Support	When you have a question or problem, you get a timely response
Self-Service Portal	The Mekorma Portal lets you place your orders, log support cases and access your partner resources 24/7.

Why Choose Mekorma?



EASE



CONTROL



CARE

We've been around since 1990 and in the ERP channel since Dynamics GP was first released.

Our legacy of working with partners goes back to 1995. At that time, we shook hands around regional conferences and coded customizations. We learned that one of the biggest pain points for all clients was making payments accurately, securely, and on time. That set our course, and we committed to focus on AP, developing the full suite of AP Automation tools that we have today.

In addition, we love ERP systems! Our products deeply integrate within the ERP, distinguishing us from other vendors. The advantage of an embedded system minimizes learning curves, security hassles and integration headaches.

We grew and were granted many accolades by Great Plains Software and Microsoft, including the Partners Choice ISV of the year in 1998. In 2023, we attained the Business Applications designation for Microsoft Solutions Partner. Our team works hard to remain experts in both Accounts Payable and emerging technologies. Mekorma solutions assist throughout the AP lifecycle - from invoice receipt to making payments.

The many years of service in this community have yielded over 5,000 clients. Almost 95% of those clients have been brought to us through one of many close and valued partnerships. We appreciate you!

Finally, we are in this for the long-term and we hold a big vision. Our team members not only love AP and technology, but want to make the world a better place. Mekorma supports the well-being, personal and professional growth, and work-life balance of all employees through innovative organizational development initiatives. Our 10-year goal is to give back 10% of our time to people and organizations who need it in our local communities and to be a truly sustainable company.

Our Core Values



**Personal &
Professional
Development**



**Quality
Relationships**



**Seeing the
Whole**

**Here are some of the things our partners have
to say about working with us:**

“

My clients have used these excellent products for many years. Mekorma is a truly excellent company.

STEVE SIMON

Consultant, PDG Consultants, Inc.

“

The Mekorma team is extremely easy to work with. I have nothing but positive things to say about the people and the products. Mekorma keeps improving and offering new things – they're one of the most popular ISVs with our clients.

ASHLEY KENNALLY

Account Manager, LBMC Technology Solutions

**What else would you like to know about us?
Whatever you want to know, please ask.**

Contact Us

Your Partner Engagement Team

Our Partner Engagement Managers are here to help you identify your clients' pain points, recommend relevant solutions, and advise in your client discussions. AP Automation products give organizations a complete workflow from invoice receipt through payment, and there are many ways to accomplish each step.

We provide the following support:

- Introductory calls and continuing calls as needed to support your client enablement teams (sales, consulting, etc.) with one of our Partner Engagement Managers.
 - Get up-to-date on Mekorma's product line, solution qualifiers, and AP automation best practices.
 - Collaborate on ways of reaching your clients with messages about these solutions.
- Marketing materials, such as targeted or mass emails, newsletters, blogs, client webinars, training and demo videos, testimonials.
- Quarterly partner webinars to keep you current on what's new.
- Discovery calls for a deep dive into individualized needs.
 - We conduct on-line client discovery calls through Microsoft Teams. We love getting to know clients and it helps us serve them better.
 - We learn about the client's AP department, their goals, and the things that are not working.
 - Together we'll review Mekorma solutions and qualify which are a good fit to meet their goals.
 - Ultimately, we will send our proposal of products and services to you to close the sale.
 - If you have different expectations of our working with our joint clients, please let us know how you would like us to engage, and we will do our best to accommodate your needs. We hold the highest respect of your relationship with your client.
- Help in evaluating where you can drive service dollars.

The quality relationship we have with you and your client is most important to us. Whatever you need, please reach out and we will work with you to provide. Our job is to make your job easy!

Partner Profitability

There are several ways you will make money selling and supporting Mekorma.

- **Annual Subscriptions:** Margin upon first year subscription sale and annual renewal
- **Professional Services:** Through you or through Mekorma

We have developed a Partner Profitability Model that calculates your revenue based on estimating sales and the effort needed to develop your Mekorma practice. Working with us provides excellent, steady revenue that can complement your existing practice. Our Partner Engagement Managers are happy to review the model with you.

ANNUAL SUBSCRIPTIONS

Mekorma products are sold on an annual subscription basis (as of January 2024) and you will be entitled to a 15% discount off of Mekorma's standard pricing at the time of sale and renewal. Strategic partners may earn greater margins. Please contact us to learn how you can become a strategic partner.

Note that if the client designates a new preferred service partner prior to the renewal, as sometimes happens, the subscription billing and margin will be transferred from you to the new partner.

To receive the margin:

- Place the order for the client using the Mekorma portal, and enter a designated payment method. Subscriptions will be billed automatically to you. The payment will come directly from your bank account or credit card. The wholesale amount (retail – 15%) will be charged and you are responsible for collecting the fees from your client.
- At the time of renewal, you will start to receive notices 90 days prior to your client's expiration date to give you an appropriate amount of time to collect their renewal. If a client doesn't renew, the use of their software will turn off. With Microsoft Dynamics 365 Business Central, they will receive a banner warning inside the product 10 days before their expiration and the product will stop working as of their expiration date. With Dynamics Microsoft GP, we will inform them of a lapsed renewal when it lapses and they will have a 30 day grace period to continue functioning.

Partner Profitability (continued)

MONTHLY USAGE FEES (REMOTE PAYMENT SERVICES)

For Remote Payments Services, in addition to margin on the product subscription, you will receive \$100 per month that your client is live on the service and pays their monthly RPS fee. You will receive this monthly commission, with a statement, within 45 days after the end of each month for which the monthly fee is received by Mekorma.

If a client designates a new preferred service partner, as sometimes happens, the monthly service fee will follow the subscription to the new service partner.

PROFESSIONAL SERVICES

You can choose to contract professional services and customizations with Mekorma. You can designate whether Mekorma will quote the professional service fees to you or directly to your client.

If the services proposal is sent directly to the client, on acceptance, Mekorma will bill the client directly and work with them on the project.

If the services proposal is sent to you, you will be billed 15% less than the customer-facing price and you can upcharge and bill the client at your discretion. You will owe payment to Mekorma according to the billing terms in the proposal.

Ordering & Renewing

Go to The Mekorma Portal to register an account on our portal. You will receive self-service functionality that allows you to:

1. Access marketing materials
2. Access pricing information
3. Edit client information
4. Manage orders for your clients and view order history
5. Get product keys
6. Submit and manage technical support cases and view support history

HOW TO ORDER SUBSCRIPTIONS AND PROFESSIONAL SERVICES

1. For clients new to Mekorma, log into the portal and add your new client information. Once the new client account is approved by the Sales Operations department, you can go back into the portal, click the products (bundle) you want to order and get a quote or pay for the subscription.
2. For Mekorma clients who purchased prior to January 2024, if they would like to add to their Mekorma solution, the partner or client must contact sales@mekorma.com to request a quote and invoice. This will be necessary to transition the client from their licensed software to our current subscription packs.

ORDERING SUBSCRIPTION RENEWALS

1. If you are paying for a client renewal, you will receive renewal reminders 90, 60, and 30 days before expiration. You can go into the portal and get an invoice to pay from or pay the invoice at that time.
2. In cases where your client is making direct payment to Mekorma, your client will receive renewal reminders 90, 60, and 30 days before expiration. Clients can log into the portal directly and get an invoice to pay the renewal or pay immediately. In the case of a client direct payment, no partner margin is paid.
3. Failure to renew will result in the client's inability to use our products. For Dynamics GP clients there is a short grace period when we try to bill them directly. For Dynamics 365 Business Central clients, they will receive a warning 10 days before expiration if they are not up to date and the software will stop working on their expiration date.

Ordering & Renewing (continued)

LEGACY LICENSE RENEWALS

Legacy renewals are for clients purchasing prior to January 1, 2024, based on a licensed software plus annual maintenance plan model. Mekorma will continue to bill partners for these based on the established process, at the contracted rates. Partners are required to pay Mekorma for their client's renewal within 30 days of their product expiration date. Depending on the version and build the client is currently running, failure to meet this requirement will result in late fee charges being added to the amount due or the inability of the client to use the product.

LEGACY SPLA

Sales of new SPLA orders are discontinued as of January 1, 2024. New orders will be processed as annual subscriptions. Existing SPLA clients will continue to be billed at established rates.



OUR GUARANTEE

We give a 90-day money back guarantee on subscription fees for our software.

This does not include services fees paid to Mekorma or our partners.

Implementing for Client Success

In working with you to implement for client success we have several goals:

- Collaborate with you and your client on AP best practices to give the customer the most benefit from their solution.
- Make you a hero for your client.
- Be here to back you up.

To ensure smooth sailing, we provide a certification process to go through the technicalities of our solutions. We have a few guidelines on Eligibility to Implement. Additionally, you can choose to contract with us to do the implementations and can shadow our work. This is a great way to continue to learn about the solutions.

PARTNER IMPLEMENTATION SERVICES *(Eligibility To Implement)*

For most of our partners, providing services is the core of your business. We want to support you in doing this profitably and successfully.

We provide excellent support for this through this via our policy of shadowing our implementation services the first time that you sell a new solution. We ask that you contract with us for the services. Your consultant is invited to join us every step of the way to learn how to do it in the future.

This requirement is only for your first sale of a new solution. However, because of the expansion of our solution set over the last few years, we would like to encourage even partners with longstanding sales to consider contracting with us and brushing up on their skills. Both our Partner Engagement team and our Customer Success team members would be available to discuss any specific implementation to help you decide whether to tackle it yourself or contract with us. Ultimately, our goal is to give you the tools to succeed independently.

Your consultant will be considered certified if they sit in on the implementation of the Mekorma product that was sold. If that consultant leaves your team, we would ask that you provide another consultant to shadow an implementation.

Note that, as of Jan 2024, we are also in the process of designing a certification training program which could be used instead of shadowing an implementation. More about this will be announced later in 2024.

There is one exception to our ability to provide independence. Professional Services are always required to be provided by Mekorma for the implementation of Remote Payment Services in conjunction with our provider Corpay. We have developed a highly successful and detailed process to ensure that your customers' entrée into remote payments goes smoothly.

MEKORMA PROFESSIONAL SERVICES

When you involve Mekorma in the implementation, you can take advantage of customization, product implementation and training services.

Professional Services can be contacted at professionalservices@mekorma.com.

Other Policies

SALES HOURS AND OPERATION

Our sales operations team is available from **9 am-6 pm EST** for calls and emails. Sales can be contacted at sales@mekorma.com or **888-MEKORMA (635-6762)**.

SALES TAX

Mekorma collects sales taxes on all direct sales orders and renewals for states where we are required to file. The states where sales tax is applicable may change based on changes in our business and/or changes in tax laws in various states. We will include the tax for sales originating from partners unless we have your Resale Certificate for Sales Tax on file.

DISTRIBUTION OF PRODUCT

Distribution of Mekorma products differ by ERP:

PRODUCTS FOR	WHERE DISTRIBUTED
Microsoft Dynamics GP	Mekorma Download Page
Microsoft Dynamics 365 Business Central	Appsource

REGISTRATION KEYS

Our products have a 30-day free trial, requested through self-service registration of the products. We make two exceptions to our functionality that will not qualify for a free trial:

- Remote Payment Services functionality requires a contract with Corpay to provide the payments, thus necessitating setup and purchase.
- We limit trials on our Vendor Validation tools.

All other features qualify for free trial. Note that features built with Microsoft Power Platform require the Power Platform licenses and setup. Contact sales@mekorma.com if you are unable to access keys with our self-service options.

PRICE CHANGES

Mekorma will evaluate the need for pricing changes from time to time and we will endeavor to not change more than once per year. Changes to our pricing will be communicated to both partners and clients via email by or before the first business day in October, or 90 days prior to a change, so that you have time to work through negotiations or marketing efforts in progress.

Other Policies (continued)

NOT FOR RESALE PARTNER SUBSCRIPTIONS

If you are an active partner who has sold Mekorma to a client within the last 12 months, we offer you a “Not for Resale” free subscription to use in your production environment. We feel this is good practice for testing and training purposes.

Please note that some features, such as Power Platform, may require additional licensing. As a Microsoft Reselling Partner, Microsoft licenses may be free to you.

You also qualify for free activation of Remote Payment Services (RPS) plus 50% off any other implementation of our solutions for in-house use. This provides a great opportunity to train your team, helping them better understand the solution and support your clients.

If you choose to activate Remote Payment Services, you will sign an RPS contract and pay transaction fees based on your usage. These transaction fees should be comparable to or better than what you pay normally, plus you will get some rebates for vendors that choose to be paid by credit card. We will be happy to work through an ROI process with you.

PREMIUM SUPPORT FEE *(Microsoft Dynamics GP Only)*

Mekorma applies a Premium Service Fee (PSF) on Microsoft Dynamics GP versions no longer supported by Microsoft. The PSF of \$750 will be applied at the time of the client’s yearly enhancement renewal if our records indicate the client is running an unsupported version of Microsoft Dynamics GP. If the PSF has been applied to a renewal, but the client has upgraded to a supported version, please send a screen shot of their “About Dynamics GP” window to Mekorma at sales@mekorma.com. The fee will be removed for the current year.

TECHNICAL SUPPORT HOURS

Our Technical Support team is available by phone or online during the hours of **6am-5pm Pacific time, Monday-Thursday and 6am-4pm Pacific time on Fridays**. Unlimited support is available at no-cost for clients with a current subscription on issues caused by Mekorma software. For online support, please [click here](#) or phone **888-MEKORMA (635-6762) option 3**.

How to Become a Mekorma Partner

We hope that reading this guide has encouraged you to become part of our select group of partners. As you can see, Mekorma takes pride in helping our partners be successful.

To resell our products and services, we will ask for a few steps to be completed:

- Meet with one of our dedicated Partner Engagement Managers (PEM) for an introductory meeting
- Provide information on aspects of your business so that we can understand more about how to help you – we'll meet annually to update this information:
 - What are your overall goals and how do we fit into helping you achieve them?
 - Which ERPs you sell and/or support clients on
 - Number of clients per ERP
 - Regions served
 - Are you centrally located? Spread throughout a region?
 - What verticals or industries do you specialize in?
 - When can you include us in a newsletter, webinar or email campaign?
 - Do you have in-person user event(s)? If so, can we be added to your list of ISVs to attend? What are typical dates, costs, etc. to attend the event(s)?
 - A list of contacts at your company that would be interested in information about Mekorma Solutions, such as salespeople, client success members, and consultants? We'd like to get their Name, Email, Title/Role
 - Would you like to have Mekorma conduct online webinars for your company internally?
 - Would you like to have Mekorma conduct online webinars for your clients?
- Provide proof of certification to resell Microsoft and/or Acumatica software
- Resale Certificate for Sales Tax

MEKORMA

We'd love to get to know you, and we hope to help your team succeed and grow!

Book a Call

Find us at www.mekorma.com

