



Right Networks Customer Advocates Program

Reference Guide for Cloud Premier Advocates

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THE RIGHT NETWORKS CUSTOMER ADVOCATES PROGRAM

1. What is the Right Networks Customer Advocates Program?

A referral program for Right Networks accounting and/or tax firm customers. Members of the Right Networks Customer Advocates Program benefit from:

- An initial discount for their Referral's first month of Right Networks Cloud Premier.
 - One-time savings credits against your Right Networks Cloud Premier bill that increase with the volume of Referrals that turn into new Right Networks Cloud Premier Customers.
 - 2 additional months free off of a 12-month membership of Rootworks so 14 months for the cost of 12.
 - Eligibility to refer Rootworks and earn additional savings off your Rootworks membership.
- Please refer to the [Rootworks section](#) for more information regarding the Right Networks Advocates Program and Rootworks.

2. How does the Right Networks Customer Advocates Program work?

Right Networks has made it simple for Customer Advocates to refer and save—here's how it works:

- An accounting and/or tax firm signs up to be an Advocate for Right Networks Cloud Premier.
 - The firm (now Advocate) starts referring other accounting and/or tax firms to Right Networks Cloud Premier.
 - The referred firm becomes a Right Networks Cloud Premier customer and obtains a discount off their first month of service and after two thirty-day billing periods.
 - The Advocate earns a one-time savings credit.
- One-time savings credits increase based on the Advocate's Referral volume. Exclusive promotions to earn even greater rewards and benefits may become available to Advocates throughout the calendar year.

3. How is an Advocate defined?

Each firm that successfully signs up to the Right Networks Customer Advocates Program is considered an Advocate. Therefore, an Advocate is defined as a firm.

- Only one Advocate portal is permitted per firm, however, Right Networks encourages as many individual members of the same firm to refer candidates. The more individual members of the same firm that share their firm's unique referral link, the greater chance a firm has of achieving a higher savings level. Please view the Rewards section in this Reference Guide for more details.
- If multiple members of the same firm refer the same candidate, and that candidate converts into a Cloud Premier customer, it is still considered only one Qualified Referral toward the achievement of a one-time savings credit.

4. How does an Advocate get started?

Advocates can get started through the Right Networks Customer Advocates Program Portal, hosted by PartnerStack, the technology provider powering the Right Networks Customer Advocates Program: rightnetworks.partnerstack.com/?group=cloudpremierdefault

Advocates may also access this page from:

- The Right Networks website: rightnetworks.com
- A Right Networks Advocates Program email

From the Right Networks website:

- From the Right Networks home page, hover over the “Partners” tab in the top navigation bar and then select “Advocates Program” to get to the Right Networks Customer Advocates Program information page.
- Scroll down to the bottom of the Right Networks Advocates Program information page.
- Click “LEARN MORE” under the Right Networks Cloud Premier product to get to the Right Networks Advocates Program: Cloud Premier page.
- Click “JOIN NOW” to redirect to the Right Networks Customer Advocates Portal, hosted by PartnerStack, and hit the “JOIN NOW” button on the top right-hand corner.

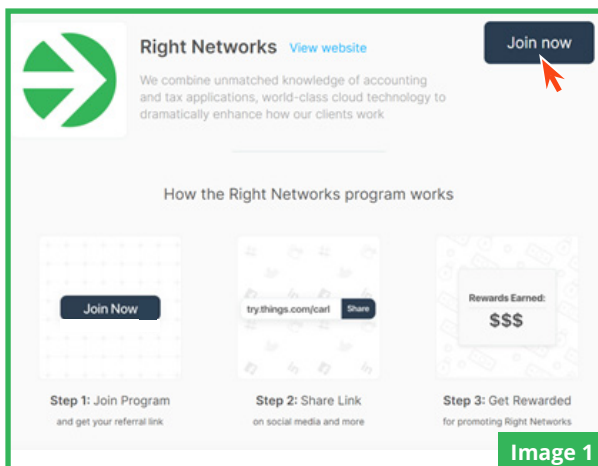


Image 1

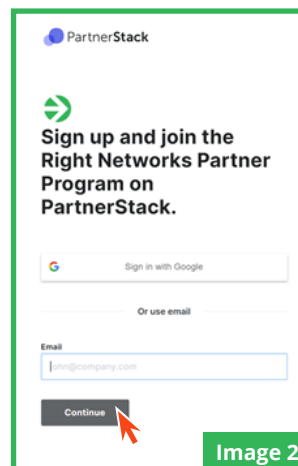


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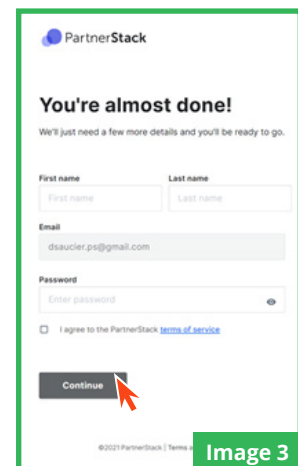


Image 3

- You will then be able to create your PartnerStack account and log in to accept the program's terms and conditions.

From a Right Networks Advocates Program email:

- Click “REFER NOW” in the email to get to the Right Networks Customer Advocates Program: Cloud Premier page.
- Click “JOIN NOW” to redirect to the Right Networks Customer Advocates Portal, hosted by PartnerStack, and hit the “JOIN NOW” button on the top right-hand corner.
- You will then be able to create your PartnerStack account and log in to accept the program's Terms and Conditions.

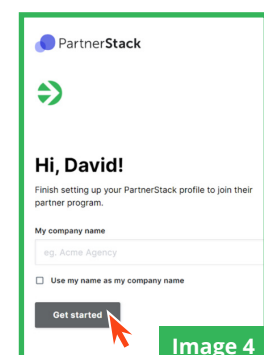


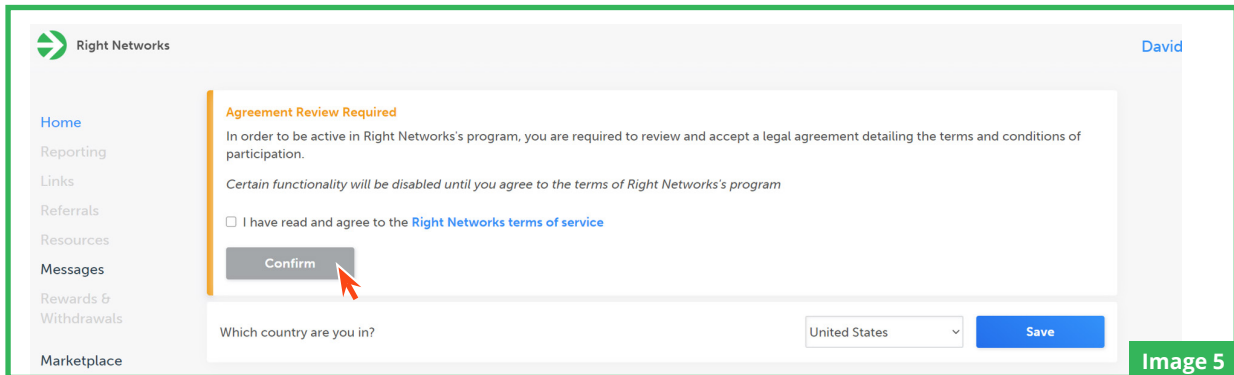
Image 4

5. When can an Advocate start referring?

A Customer Advocate can begin referring once they have been moved to the Cloud Premier Advocate group in PartnerStack and accepted the program Terms and Conditions.

6. How does an Advocate become eligible to refer and save?

For an Advocate to become active in the program and be eligible to refer, enable an initial discount for the referred customer and obtain a one-time savings credit, they must accept the program's Terms and Conditions.



The acceptance of the Right Networks Customer Advocates Program's Terms and Conditions will grant the Advocate full access to:

- A portal to manage their firm's Referral candidates.
- A unique referral link to share with their Referral candidates.
 - ▶ Referral candidates can simply click this link to be contacted by Right Networks and be associated with their Advocate.
 - ▶ Advocates can also use the referral form within the portal to fill in their referral's contact information to submit to Right Networks Cloud Premier directly.
- Right Networks Cloud Premier marketing resources to make referring (and saving) even easier.

7. Who should Advocates refer to Right Networks Cloud Premier?

Advocates understand best which pain-points are most commonly felt by other accounting professionals and their clients—and how Cloud Premier could potentially help them. The global pandemic has further accentuated these pain-points by limiting face-to-face interactions and forcing offices to shut down. This has created an opportunity to start or enhance the use of cloud technology to make work-from-home workflows easier for both the client and their accountant.

Here are a few example scenarios to help Advocates decide who to refer to Right Networks Cloud Premier:

- A friend and/or acquaintance working for a firm is discussing how difficult it's been to adjust to working-from-home.
- A friend and/or acquaintance working for a firm expresses frustration with the time it's taking them to manage their IT.

- A friend and/or acquaintance working for a firm isn't sure what their cyber security protocols are or have expressed concern about their firm being vulnerable to a cyber-attack.

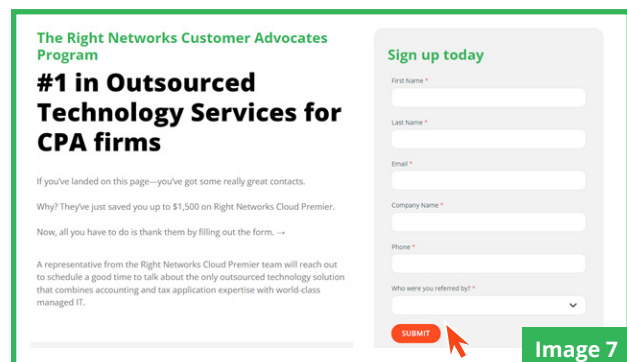
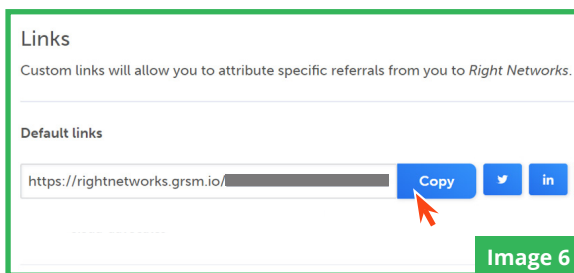
Example questions to help Advocates probe for Right Networks Cloud Premier Referral opportunities:

- How has your firm adjusted to work from home?
- How is your firm's IT managed today?
- How are you ensuring the highest level of security in light of the remote work phenomenon?

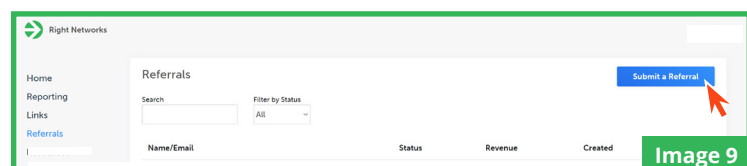
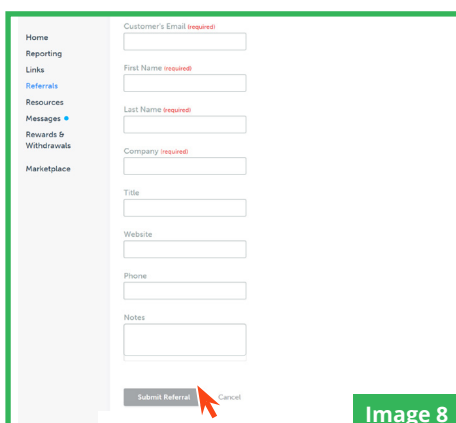
8. How does an Advocate submit a Referral candidate?

There are two ways a Customer Advocate can refer:

1. Share the unique Advocate's link via social media and/or email. This is the easiest and preferred method for Advocates to refer.
 - a. Referral candidates must click on the Advocate's unique referral link for the Advocate to be credited with that referral. The link will bring the Referral candidates to the Cloud Premier Advocates landing page where they can submit their contact information to Right Networks.



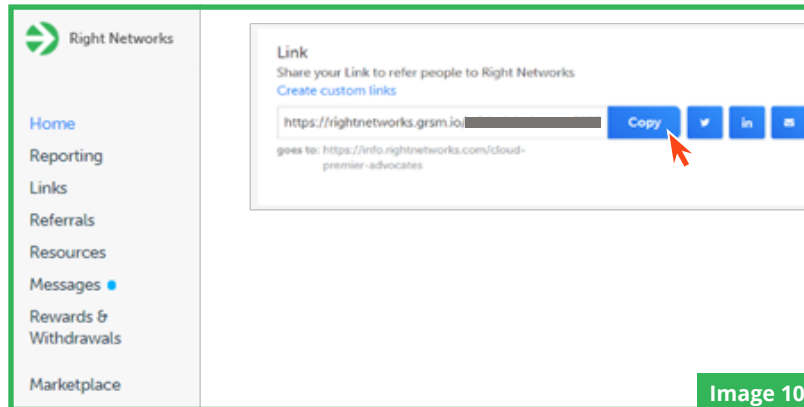
2. Submit a Referral candidate using the "Submit a Referral" button located on the Referrals page on their portal.
 - a. Once the lead is submitted by the Advocate, a representative from the Cloud Premier sales team will follow up with the Referral directly.



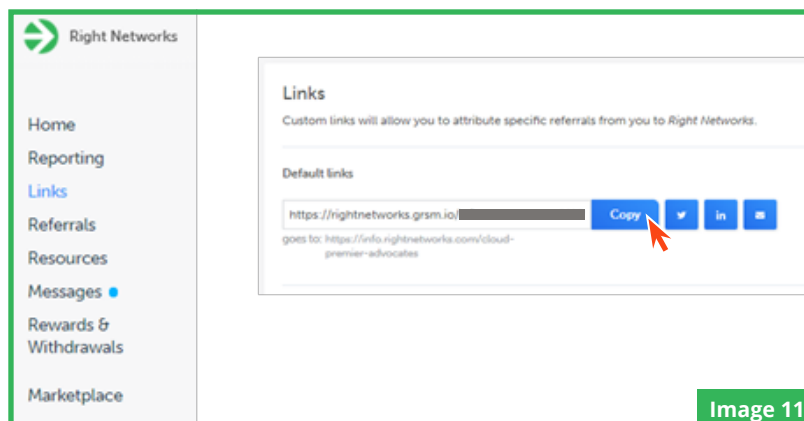
9. How does an Advocate obtain their unique referral link?

Upon joining the Right Networks Customer Advocates program, and after the Advocate accepts the program's Terms and Conditions, their unique referral link can be obtained on their portal from either the Home page or Links page:

► Home



► Links



10. Where are Advocates allowed to share their unique referral links?

Advocates can share their unique referral link anywhere they feel it will help reach the right accounting and/or tax firm audience. Typically, that includes their network of accounting and/or tax professionals via:

- Social media
- Email
- Blog posts

Once a Referral candidate clicks on an Advocate's link, they'll be directed to submit the "Get in touch with Sales" form on the Cloud Premier Advocates landing page. That submitted form will then be tracked and attributed to the Advocate whose referral link was used.

11. Can an Advocate see anybody who's clicked on their unique referral link?

No. Advocates can only see the Referral candidates who have clicked on their unique referral link and filled in the "Get in touch with Sales" form located on the Cloud Premier Advocates landing page, accessible here: dash.partnerstack.com/rightnetworks/links

Referrals that click and sign up using an Advocate's unique link can be tracked in the Referrals section of the portal; until a status change, these Referrals' statuses will read: Signed Up.

12. What if a Referral candidate signs up but forgets to use the unique referral link?

A Referral will be attributed to an Advocate if they've clicked through the Advocate's link or clicked on it in the past 90 days.

If a Referral purchases Right Networks Cloud Premier without clicking on an Advocate's link, the referral will be manually imported into the system by PartnerStack, the technology provider powering the Right Networks Customer Advocates Program portal.

The reward will then be generated for the referring Advocate, if applicable.

TRACKING REFERRALS

13. Can Advocates track the status of their Referrals?

Yes. Advocates are provided with a portal, powered by PartnerStack, to track Referral status.

Clicking on the Referrals tab, located in the left-hand navigation within the portal, will give Advocates the status of each Referral.

14. How do Advocates know if their Referral has been accepted?

Any referral submitted either from a Referral candidate directly, or by the Advocate using the Submit a Referral form located on the Referrals section of the advocate portal, will populate with a New status until it has been reviewed by Right Networks.

15. Can Advocates track the progress of their Referral?

Yes. Advocates can track the progress of their Referral by reading their status, located on the Referrals page in the advocate portal. Referral statuses include: New, Signed Up, and Paid.

- ▶ **New:** The Advocate has submitted the Referral candidate using the Submit a Referral button located in the Referrals page on their portal.
- ▶ **Signed Up:** The Referral candidate has submitted their contact information on the Cloud Premier Advocates landing page.
- ▶ **Paid:** When the Referral has been an active customer with Right Networks Cloud Premier for two (2) thirty (30) day billing cycles, qualifying the Advocate for their one-time savings credit.

16. How does an Advocate know if their Referral becomes a customer?

If the Advocate's Referral has become a Right Networks Cloud Premier customer, the Referral will have a Paid status on the Referrals page on the advocate portal.

17. Is there a limit to the number of accounting and/or tax firms an Advocate can refer?

No.

ADVOCATE AND REFERRAL CRITERIA

18. What does an Advocate have to do to be eligible to start saving?

An Advocate must meet the following conditions to be eligible to start referring, unlocking initial discounts for their referrals and one-time savings for the advocate:

- The Advocate must be a current Right Networks Cloud Premier customer.
- The Advocate must be an accounting and/or tax firm.
- The Advocate must **have accepted the program's Terms and Conditions**.

19. Which conditions must a Right Networks Cloud Premier Referral meet for an Advocate to earn their savings credit?

A Referral must be a Qualified Referral for an Advocate to earn their reward. A Right Networks Cloud Premier Referral can become a Qualified Referral ONLY if the following conditions are met:

- The Referral was made by a Customer Advocate of Right Networks Cloud Premier that has accepted the Right Networks Customer Advocates Program terms and conditions.
- Right Networks has no record of the Referral in connection with the Right Networks products.
- The Referral has not already been referred by another Advocate.
- At the time of the referral to Right Networks by the Advocate, the referral is not involved in any contractual relations or ongoing negotiations with Right Networks in connection with the Right Networks products being referred.
- The Referral is an accounting and/or tax firm.
- Following the Advocate's referral, the Referral has purchased the Right Networks Cloud Premier product.
- The Referral has not been rejected by Right Networks for any reason.
- The Referral has completed and paid in full for two (2) thirty (30) day billing cycles for the Right Networks Cloud Premier product.

20. Which conditions must a Rootworks Referral meet for an Advocate to earn their reward?

A Rootworks Referral must be a Qualified Referral for an Advocate to earn their reward. A Rootworks Referral can become a Qualified Referral ONLY if the following conditions are met:

- The Referral was referred by a Customer Advocate to Right Networks and accepted the program Terms and Conditions.
- The Right Networks Customer Advocate must also be a current Rootworks member. If they are not a current Rootworks member they can become one and receive 2 additional months free off of their 12-month membership.
- Right Networks or Rootworks has no record of the Referral in connection with the Rootworks products.
- The Referral has not already been referred by another Advocate.
- The Referral is not, at the time referred to Rootworks by the Advocate, in any contractual relations or ongoing negotiations with Rootworks in connection with Rootworks products.
- The Referral is an accounting and/or tax firm.
- Following the Advocate's referral, the Referral has purchased a 12-month Rootworks membership.
- The Referral must be in good standing for at least 3 months after joining Rootworks or the referral is void.
- The Referral has not been rejected by Right Networks or Rootworks.
- The Referral has made the necessary payments for their Rootworks membership.¹

¹ *If Qualified Referral has elected to pay for Rootworks using an annual billing cycle (one payment per year), the Rootworks Reward for that Qualified Referral will be credited by Rootworks to Advocate within thirty (30) days of Rootworks receipt of the Qualified Referral's annual payment. If the Qualified Referral has elected to pay for Rootworks using a monthly billing cycle, then the Rootworks Reward will be credited by Rootworks to Advocate within thirty (30) days after the Qualified Referral has completed and paid in full for two (2) thirty (30) day billing cycles.*

REWARDS

21. How can Advocates see if they have earned a savings credit?

When an Advocate earns a savings credit, it will appear with a status of “New” under the Reward status column located on the Rewards & Withdrawals page. Once the savings credit has been approved by Right Networks, a credit will be applied to your next invoice. The Reward status will show as New until the savings credit has been reviewed and approved by Right Networks:

- ▶ **New:** Right Networks needs to review the savings credit
 - ▶ **Approved:** Right Networks has reviewed and approved the savings credit
 - ▶ **Declined:** Right Networks has reviewed and declined the savings credit
 - ▶ **On Hold:** Right Networks has asked for more time to review the savings credit
- An Advocate can see the actual dollar amount of each credit they are eligible to receive in the “Reward Offers” section.

22. When can Advocates expect to receive their savings credit?

The payout process works as follows:

- From the 1st to the final day of a month, Advocates earn and accrue savings credits.
 - Savings credits are marked as “New” on the Rewards & Withdrawals page.
 - On the final day of the month, PartnerStack sends a list of all pending rewards to Right Networks.
 - Right Networks will then review the pending rewards and approve/decline as needed.
 - Approved savings credits will be applied to your next Right Networks invoice and the status of the reward will be changed to “Approved” around the 13th of the following month.
- ▶ Unpredicted delays in payouts may result in savings credits becoming available after the 13th.

23. Is there a limit to the number of rewards Advocates can earn?

No.

24. What rewards can Advocates earn?

- One-time savings credits that grow with the volume of active Qualified Referrals a firm provides to Right Networks within a calendar year.
- Initial discounts on 12-month Rootworks membership proven to help firms increase profitably and grow.
- Access to exclusive promotions to earn even greater savings and benefits that may become available to Advocates throughout the calendar year.

25. How much does an Advocate save?

An Advocate's savings potential depends on the size and volume of firms they refer in the same calendar year. "Firm size" is calculated by the number of unique users who will need access to Right Networks Cloud Premier.

Savings Tiers based on size of the referral.

Firm size	Advocate savings ²	Premier Advocate savings ² Advocate savings * 150%	Raving Fan savings ² Premier Advocate savings * 200%
5 - 20 unique users ¹	\$500.00	\$750.00	\$1,000.00
21 - 49 unique users	\$1,000.00	\$1,500.00	\$2,000.00
50+ unique users	\$2,000.00	\$3,000.00	\$4,000.00

¹ Right Networks Cloud Premier referrals have a minimum of 5 unique users per firm. Any firm having less than 5 users will not qualify as a referral.

² A qualified referral will earn you a one-time savings credit against your Cloud Premier bill.

Referral Levels based on volume of qualified referrals within the calendar year.

26. How does an Advocate start to earn the Premier Advocate or Raving Fan savings?

All qualified Right Networks Advocates Program members start as Advocates and can advance to Premier Advocates or Raving Fans based on the number of new Cloud Premier customers they have referred within the same calendar year.

- **Advocate:** 1 - 3
- **Premier Advocate:** 4 - 9
- **Raving Fan:** More than 10

Advancing to Premier Advocate or Raving Fan status will accelerate savings by 150% and 200% of the Advocate's one-time savings credit, respectively.

Level	Advocate	Premier Advocate	Raving Fan
Referral volume within the same calendar year	1 - 3	4 - 9	10+
Savings Accelerator	N/A	150%	200%

27. Is there an example of how much an Advocate could save in a year?

Below is an illustration of how much an Advocate could save if they were to make six Qualified referrals: within the same calendar year.

Referral #	Firm size	Advocate status	One-time savings
1	21 - 49 unique users	Advocate	\$1,000.00
2	21 - 49 unique users	Advocate	\$1,000.00
3	21 - 49 unique users	Advocate	\$1,000.00
4	21 - 49 unique users	Premier Advocate	\$1,500.00
5	21 - 49 unique users	Premier Advocate	\$1,500.00
6	21 - 49 unique users	Premier Advocate	\$1,500.00

For example:

An Advocate makes six Qualified Referrals during this calendar year. All six referred firms have between 21 - 49 unique users each.

- Advocate saves \$1,000 for the first, second, and third Qualified Referrals.
- Advocate becomes a Premier Advocate after the third referral, saving \$1,500 for the fourth, fifth, and sixth Qualified Referrals.
- ▶ If all referrals meet the qualification criteria, then the Advocate will save \$7,500.

28. Can an Advocate only refer Rootworks?

An Advocate must be an active Rootworks member to be able to refer Rootworks.

- By joining the Right Networks Customer Advocates Program, any first-time Rootworks member can get 2 additional months free off a Rootworks 12-month membership. This equals 14 months for the cost of 12.
- Right Networks Advocates who are already Rootworks members can earn a one-time savings credit per Qualified Referral. That credit is based on the new referral's membership monthly fee (e.g., if the advocate is already a Rootworks member or becomes a Rootworks member through the Advocates Program at an Advantage level and refers a new member who remains in good standing for a minimum of 3 months the advocate will receive a 1-month credit against their Rootworks membership, which would for Advantage level would equate to \$600.

29. Do Referrals receive any benefits for signing up for Right Networks Cloud Premier or Rootworks through their Advocate?

Yes. Referred firms receive an initial discount for their first month of Right Networks Cloud Premier, depending on the size of their firm, as a result of an Advocate's referral.

Firm size	Referred firm's discount
5-20 unique users	\$250.00
21-49 unique users	\$500.00
50+ unique users	\$1,000.00

Accounting and/or tax firms that sign up for Rootworks as a result of a referral made by a Right Networks Advocate who has become or is already a Rootworks member can get 2 additional months free on their 12-month Rootworks membership. This equals 14 months for the price of 12.

SUPPORT

30. Where can Advocates go to find additional information?

For answers to technical questions related to using the PartnerStack portal:

- Browse the [PartnerStack Knowledge Base](#)
- Email support@partnerstack.com

For more information about the Right Networks Cloud Premier Advocates Program, please email

RNAadvocates@RightNetworks.com