



# Unify Partner Program Guide

This guide is your primary resource for Unify Partner Program benefits, requirements, and rewards.

December 2018

# Welcome to Unify!

Dear Valued Partner,

The Unify Partner Program has evolved into a world class Partner Program. Over the last year we have enhanced numerous offerings to help Partners drive greater impact into the market place. This makes it easier for Partners to do business with Unify, be innovative with solutions and drive more predictable revenue streams and profits.

Our primary focus is to continue to help you achieve sales success by enabling you to provide managed or hosted cloud solutions to small, medium, large and enterprise customers. We will achieve this by elevating your sales and technical expertise and by providing you with the tools and resources you need to take advantage of new unified communications and collaboration market opportunities. Our solutions offer you future-proof scalability - supporting up 100,000+ users with resiliency and universal bridging capabilities that can scale in support of expanding existing opportunities or offering new video, voice, and mobile services.

Unify is committed to investing in and expanding our partner business by deriving most of our sales from the channel. It's a huge opportunity for your business!

**Unify's Partner Program is based on 6 core principles that will help you grow your business:**

- Profit predictability to build trust and drive alignment
- Incentives that provide opportunities for increased profits and fast ROI
- Rewarding your investment in us by offering specialization level discounts
- Improved differentiation to highlight depth of expertise and/or specialization.
- Streamlined processes to accelerate faster time to business
- A commitment to partner and customer satisfaction

Your role as a Unify Partner is now more important than ever as we develop joint hosted solutions, enabling you to deliver a new generation of Cloud Services into the public and private cloud. You'll find that the Unify Partner Program gives you better business opportunities, better discounts and better perspectives. The more time and resources you commit to Unify, the more we'll invest in you. The combination of market momentum, increased demand for IT as a Service, and innovative technology from Unify makes this a great time to be a Unify Partner. With Unify technology, our Partners can deliver innovative UC solutions from the cloud and blend voice, data, applications and collaboration into a seamless customer experience.

Throughout this guide, you will find information about our Unified Communications and Collaboration solutions, resources, certification, training, tools, processes and much more, to help you take advantage of strong market growth and revenue opportunities for public, private, and hybrid cloud services.

On behalf of everybody at Unify, thank you for your continued Partnership and support. We wish you every success and a long and profitable Partnership with Unify.

Good Selling,

Simon Skellon  
Chief Sales Officer, Unify

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# 1. About this Guide

This program guide applies to Unify Resellers and is designed to provide detailed information about the program benefits and requirements. Resellers serve end user customers from project concept and installation, through to on-going support and management. To help ensure customer satisfaction, Unify Resellers invest in Certification/Specialization and training programs to develop their skills and competency.

Further information regarding the program benefits, initiatives and engagement processes may be found on the [Unify Partner Portal](#). The terms “you” “Reseller” and “Partner,” are used interchangeably throughout this program guide to refer to your company. This guide describes the Unify Partner Program, structure, benefits, requirements and important information on the Global Unify Partner Network.

## Confidentiality

This Unify Partner Program Guide and all communications from Unify with respect to the Unify Partner Program (collectively the “Program Information”) are Unify confidential information. All Partners are required to treat the Program information as Unify confidential information in accordance with (i) the terms and conditions accepted online for partners who are buying from distribution and for partners buying directly from Unify accepted with signature of the Partners Agreement.

## Program amendments

Unify may, at any time and at its sole discretion, modify, add to, reduce, or otherwise change any of the terms of the program and this guide (collectively, “Changes”), including without limitation, the requirements and benefits hereunder. Unify may provide notice of any changes by email, posting or otherwise publishing such changes on Unify Partner Portal and in accordance with contractually agreed terms.

## Target Audience

The Unify Partner Program has been created for self-sufficient Value Added Resellers providing communication solutions to end customers.

## Partnering with Unify

As a Unify Reseller, when you increase your commitment to Unify by achieving important business goals and investing in Specializations (defined within this document), your overall recognition and reward within the Program increases. This program provides a framework in which Resellers can measure their abilities and advance, within the program.

## 2. Introduction

Together, Unify and our Partners make it easy for people to communicate face-to-face with the applications and devices they use every day. With our OpenScape solutions and the Global Unify Partner Network, we provide customers with scalability and security for collaboration, whether on-premises, hybrid, hosted, or cloud-delivered.

Unify's Partner Program provides a framework designed to recognize our unique routes to market while giving Partners a clear understanding of the requirements, rewards and benefits of UC&C market growth. The program has been designed to support Unify's Partners through business growth, sales of Unify products, solutions, services, and competency achievement in leading edge, differentiated Unify solutions.

### Getting Started

Whether you are considering a new Partnership with Unify or you are an existing Partner, you are encouraged to make the most of your Partnership by leveraging the full range of benefits available to you. Unify's Account Management team will work with you to assess your business goals and develop a plan, for mutual success. Get started today by signing our Partner Agreement (available from [partner.recruitment@unify.com](mailto:partner.recruitment@unify.com)) or, if you are purchasing via Unify accredited Distributors, register directly under [unify.com/becomeapartner](http://unify.com/becomeapartner).

### Program Registration/Application

Once your organization has signed an agreement/registered for Partnership into the Unify Partner Program, and been approved, you can work towards achieving the appropriate Partnership requirements. The Unify Partner Program sets out the minimum requirements that must be met to be eligible for membership. Requirements are structured to create a cohesive Unify Partner community and to provide customers the optimal choice of a Partner, who will provide the right products or solutions to meet their business needs. Unify Partners are able to sell Unify solutions according to their chosen specialization as soon as they have completed the certification requirements for sales. By the time all of the other specialization level requirements in this program guide are fulfilled, submitted and approved by Unify, you benefit from the specialization level according to the Economic Model (upfront discount and backend rebates) and the respective additional benefits.

### On-Boarding

The on-boarding process is quick and easy! Once you have registered into the program, you will receive a welcome letter, including 'next steps'. Once all the requirements of this program have been met, you will be eligible for the rewards detailed in the economic model and the benefits that go with it. Master and Professional Level Partners can be generating revenue and receive rewards within 4-8 weeks. Authorized level Partners with OpenScape Business Specialization and/or Circuit can be on-boarded within one week if they have completed the minimum required sales training course and test online.

If you have any questions, comments or suggestions, contact us at [partner.recruitment@unify.com](mailto:partner.recruitment@unify.com).

# 3. Program Structure

The Unify Partner Program was specifically designed to reward the investments and commitment you make in selling our solutions to your customers and providing them with support. As a Unify Partner, when you increase your commitment to Unify, by achieving important business expanding goals, providing demonstration capabilities and investing in more Specializations, your overall recognition and reward within the Program, increases.

Unify solution and service expertise is the foundation of our shared success and enables you to effectively sell, install and support Unify solutions. Achieving a Specialization enables you to access and sell Unify solutions in any deployment scenario. It enables Partners to provide maintenance and operational support to facilitate customer satisfaction throughout the lifecycle of their solution. Specializations represent the Partner’s sales, technical, services and support capabilities in a particular solution, business, or market. Unify Specializations showcase an in-depth level of expertise in Unify solutions. Obtaining a Specialization maximises your expertise, differentiates yourself in the market place, allows you to bundle Unify solutions with your portfolio to offer value added, differentiating solutions to new and existing customers.

There are four specializations that enable you to benefit and evolve your skills:

1. OpenScape Business (OSB)
2. OpenScape 4000 (OS4K)
3. OpenScape Enterprise (OSE) including OpenScape Enterprise Express
4. OpenScape Cloud: OpenScape Cloud is Unify’s Cloud offering and is offered separately under the OpenScape Cloud Program. For more information, visit [Partner Portal](#) > Sell -> OpenScape Cloud.

Within our specializations, you can achieve different levels – the higher the level, the greater the benefits.

- Authorized (entry level)
- Professional
- Master (highest level)

## Specialization & Specialization Levels

| Specializations<br>Specialization Levels | OpenScape Business              | OpenScape 4000              | OpenScape Enterprise              | OpenScape Cloud*             |
|--|---------------------------------|-----------------------------|-----------------------------------|------------------------------|
| Master                                   | Master OpenScape Business       | Master OpenScape 4000       | Master OpenScape Enterprise       | Master OpenScape Cloud       |
| Professional                             | Professional OpenScape Business | Professional OpenScape 4000 | Professional OpenScape Enterprise | Professional OpenScape Cloud |
| Authorized                               | Authorized OpenScape Business   | N/A                         | Authorized OpenScape Enterprise   | Authorized OpenScape Cloud   |

\*Public Cloud offerings have a different base discount than OpenScape HWSW Portfolio

*\*The OpenScape Cloud Specialization Program is described in a separate Partner Guide, which can be found on the [Partner Portal](#). OpenScape Cloud is a Cloud offering and therefore has an adapted economic model.*

**Authorized:** This is the entry level for a specialization

- Register online and accept the online partner agreement
- Confirm that you will adhere to Unify branding guidelines
- Ensure regulatory compliance with industry standards
- Participate in customer satisfaction survey

**Professional:** This is the intermediate specialization level.

- Meet the requirements for the Authorized level (above)
- Develop an annual business and demand generation plan: to be reviewed every 3 months
- Nominate a Unify advocate / portfolio manager: this person oversees activities like portfolio product launches in your market
- Ensure you have adequate solution demonstration capabilities
- Participate in a minimum of 5 customer satisfaction surveys per rolling audit year

**Master:** Master is the highest specialization level.

- Meet the requirements for the Professional level (above)
- Achieve a minimum total annual sales volume, varies by country cluster
- Nominate an advocate for Unify portfolio: this is the go-to person for questions concerning the Unify products you're selling
- Provide one customer reference per year
- Allocate marketing resources to the Unify portfolio
- Develop a three-year strategic plan for your Unify business, with your Unify Account manager
- Quarterly business planning together with your channel account manager
- Work on joint account plans with Unify
- Participate in a minimum of 5 customer satisfaction surveys per rolling audit year

You can differentiate your business by using our partner emblem showing your respective Specialization and Specialization level on your collateral, website and other materials.

## Eligible Products

Unify Partners are able to offer Unify products, solutions and service, once the respective specialization has been completed. For a list of 'Eligible Products', please refer to Annex A, contained within this program guide. Joint solutions are to be signed off and approved by Unify Sales/Product team.

## Open Product Segments (PSEGs)

All Partners are able to purchase and resell the following open Product Segments, without an accredited specialization level:

- MOBIDEVI Mobile Devices
- STAGETDM OpenStage TDM
- STAGE\_IP OpenStage IP
- STAGEACC Accessories OpenStage
- SPAREPAR Spare parts
- CPDEV\_IP CP Devices IP
- CPDEVACC CP Accessories

## 4. Program Benefits

Unify offers a variety of financial incentives and marketing resources, programs, tools and communication vehicles to help our Partners increase visibility and sell Unify solutions! While other Partner Program's provide discounts and benefits based on sales volumes alone, the Unify Partner Program goes a step further. You will naturally be rewarded at your highest specialization level for your sales performance in terms of volumes and revenues. The more you invest in training, certifications and advancing your staff's expertise, the more you benefit from the program.

If you achieve Master level for one Specialization and Professional level for another, you will be rewarded at the Master level for all the Unify portfolio products you sell. If you go on to achieve Master level in two specializations, you will benefit from an additional breadth discount.

### Economic Model

Market-driven discounts and attractive back-end rebates reward your commitment and hard work. They enable you to win deals for your core business, while giving you financial benefits after the sale – the backend rebates. Unify also offers 'Special Bid pricing' to help close major opportunities or displace competition. Special Bid deals are evaluated on a case-by-case basis and subject to terms and conditions.

#### Upfront discounts are based on:

- **OpenScope Portfolio Base Discount** – available to all our partners
- **Specialization Level Discount** – available to Master or Professional level partners only – the more you invest in Unify specializations, the greater your upfront discount
- **Breadth Level Discount** - the greater the number of Master level specializations you have achieved, the more the upfront discount to reward the breadth of your investment in Unify
- **Special Bid Pricing:** in addition to the discount described above, we allow special bid pricing discount to help close major opportunities, especially if you're displacing a competitor (these are agreed on a case-by-case basis)

In addition to the OpenScope base discount, you can enjoy the following upfront Program discounts, once you have completed the specific Specialization requirements:

|                 |                                  | Authorized                              | Professional | Master           |                  |                    |
|-----------------|----------------------------------|---|--------------|------------------|------------------|--------------------|
| Discount Scheme | Portfolio Base Discount          | 42%                                     |              |                  |                  |                    |
|                 | Cluster Discount                 | Depending on Product and / or Territory |              |                  |                  |                    |
|                 | Specialization Level Discount    | 0%                                      | 3%           | 4%               |                  |                    |
|                 | Breadth Discount                 | n/a                                     | n/a          | One Master<br>1% | Two Master<br>2% | Three Master<br>3% |
|                 | <b>Standard Partner Discount</b> | <b>42%</b>                              | <b>45%</b>   | <b>47%</b>       | <b>48%</b>       | <b>49%</b>         |
|                 | Special Bid Pricing              | Agreed on a case-by-case basis          |              |                  |                  |                    |
| Backend Rebates | Value Rebate                     | n/a                                     | 1%           | 1%               |                  |                    |
|                 | Marketing Fund                   | n/a                                     | 1%           | 2%               |                  |                    |



**Note:** Partner's purchasing via a Unify accredited distributor this is a non-binding, recommended retail price calculation. Pricing is solely at the discretion of our distributors. However, Unify accredited distributors generally take your specialization level into account when calculating their pricing. Please consult your Unify accredited distributor for more information. Some Portfolio segments have a different base discount according to the nature of the business, e.g. Professional Services, Cloud Offerings, HIMED Healthcare etc..

**Master and Professional level Reseller enjoy back-end rebates, calculated based on Net Revenue derived on the 1-tier or 2-tier Net Reseller Purchase Price:**

- **Value Rebate** = 1% (Calculated on the previous qtrs' eligible business and credited the 1<sup>st</sup> month of the following qtr)
- **Marketing Fund** = 1% or 2% (Accrued monthly and valid for 6 months.)

For more information on Value Rebate and Partner Marketing Fund, visit [Unify Partner Portal](#).

Back-end rebates are achieved once the business plan has been agreed and subject to achieving annual net revenue threshold, for Unify product and service sales. Failure to achieve the annual net revenue threshold will impact your ability to earn backend rebates. Minimum threshold earnings apply.

**Extended Specializations**

- The base discount for HIMED Healthcare is 27% (not 42%).
- The base discount for Evidian is at the discretion of the Distributor and not included in the Standard economical model.
- Breath discount does not apply.

## Value Rebate – The claiming process for Reseller Partners, purchasing via Distribution

The Value Rebate is payable to Professional and Master Resellers based on the calculated 2-tier Net Sales Out Value, reported by the distributor on a quarterly basis (reporting quarters are: Q1 - Jan-Mar, Q2 - Apr-Jun, Q3 - Jul-Sep, Q4 - Oct-Dec). The Value Rebate will be available for claiming, 30 days after the reporting quarter ends. Our 3<sup>rd</sup> party Payment Provider, Birch, will inform you by a notification e-mail, as soon as the quarterly Value Rebate is ready to be claimed. You must login to the Rebate Payment Portal to claim the rebate, and enter bank payee details. Successfully claims will be transferred to the nominated bank account within 30 days.

- Payment will only be made in €.
  - Any bank fees for transferring in local currency, are the responsibility of the partner, and are to be paid locally.
- Partners must claim their rebate within 60 days of receiving the initial notification e-mail from Birch.
  - After this timeframe the value rebate will expire. Expired rebates will not be paid.
- Minimum payout for the Value Rebate earned in a quarter is 50€.
  - Any Value Rebate below 50€ will not be paid out and expires.

For more information, visit [Partner Portal > Birch Payment Guide](#), or email [partnerfund@unify.com](mailto:partnerfund@unify.com).

## Marketing Fund

Eligible Professional and Master Partners can accrue the marketing funds on a monthly basis, calculated by Unify, as a percentage of net purchase revenue and communicated on a quarterly basis. The program is managed online, which Partners can leverage to invest in marketing and demand generating activities. Partner Marketing Funds may be used for agreed activities and in line with Unify Marketing Fund Guidelines. Once Unify approves your application, you can go ahead and complete your activity, then submit the claim up to 60 days after the activity end date. For more information, visit [Partner Portal > Marketing Fund Guide](#), or email [partnerfund@unify.com](mailto:partnerfund@unify.com).

## Promotions

Unify periodically provides sales promotions to help you develop new sales opportunities and grow your business. Check the Partner Portal for news of the latest promotions.

# 5. Program Requirements

To qualify as a Unify Partner, you must achieve the following specialization requirements based on your chosen portfolio:

- Number and level of the certificates, which differs by Country (see Country cluster matrix Annex B)
- Service requirements
- Meet the designated revenue threshold as defined below and additional requirements
- 

| Country Cluster 1<br>Criteria | OpenScape Business      |                            |                       | OpenScape 4000      |                 | OpenScape Enterprise       |                      |                            |                              |
|-------------------------------|-------------------------|----------------------------|-----------------------|---------------------|-----------------|----------------------------|----------------------|----------------------------|------------------------------|
|                               | Master                  | Professional               | Authorized            | Master              | Professional    | Master                     | Professional         | Authorized**               |                              |
| Certification                 | Sales                   | 2 Specialists              |                       | 1 Specialist        | 2 Specialists   |                            | 2 Specialists        |                            | 1 Specialist                 |
|                               | Technical Sales         | 1 Expert                   |                       | Recommended         | 1 Expert        |                            | 1 Expert             |                            | N/A                          |
|                               | Implementation Support  | 2 Experts                  | 2 Specialists         | N/A                 | 2 Experts       | 2 Specialists              | 2 Experts            | 2 Specialists              | 1 Associate                  |
| Commitment                    | Unify Sales Volume      | 500k Euro                  | N/A                   | N/A                 | 500k Euro       | N/A                        | 500k Euro            | N/A                        | N/A                          |
|                               | Additional Requirements | Master Criteria            | Professional Criteria | Authorized Criteria | Master Criteria | Professional Criteria      | Master Criteria      | Professional Criteria      | Authorized Criteria          |
| Services                      | Contact                 | Named Person               |                       | N/A                 | Named Person    |                            | Named Person         |                            | Named Person                 |
|                               | 1st Level Support       | Named Technical Assistance |                       |                     | Help Desk       | Named Technical Assistance | Help Desk            | Named Technical Assistance | Named Technical Assistance   |
|                               | Service Level           | 24/7*                      | 8/5                   |                     | 24/7*           | 12/7                       | 24/7*                | 12/7                       | 8/5                          |
|                               | Demo System             | OpenScape Business         |                       |                     | OpenScape 4000  |                            | OpenScape Enterprise |                            | OpenScape Enterprise Express |

\*This requirement can be fulfilled using an on-call system for after-hours support.

\*\* Allows for selling OpenScape Enterprise Express (OSEE) only

| Country Cluster 2<br>Criteria | OpenScape Business      |                            |                       | OpenScape 4000      |                 | OpenScape Enterprise       |                      |                            |                              |
|-------------------------------|-------------------------|----------------------------|-----------------------|---------------------|-----------------|----------------------------|----------------------|----------------------------|------------------------------|
|                               | Master                  | Professional               | Authorized            | Master              | Professional    | Master                     | Professional         | Authorized**               |                              |
| Certification                 | Sales                   | 2 Specialists              |                       | 1 Specialist        | 2 Specialists   |                            | 2 Specialists        |                            | 1 Specialist                 |
|                               | Technical Sales         | 1 Expert                   |                       | Recommended         | 1 Expert        |                            | 1 Expert             |                            | N/A                          |
|                               | Implementation Support  | 2 Experts                  | 2 Specialists         | N/A                 | 2 Experts       | 2 Specialists              | 2 Experts            | 2 Specialists              | 1 Associate                  |
| Commitment                    | Unify Sales Volume      | 250k Euro                  | N/A                   | N/A                 | 250k Euro       | N/A                        | 250k Euro            | N/A                        | N/A                          |
|                               | Additional Requirements | Master Criteria            | Professional Criteria | Authorized Criteria | Master Criteria | Professional Criteria      | Master Criteria      | Professional Criteria      | Authorized Criteria          |
| Services                      | Contact                 | Named Person               |                       | N/A                 | Named Person    |                            | Named Person         |                            | Named Person                 |
|                               | 1st Level Support       | Named Technical Assistance |                       |                     | Help Desk       | Named Technical Assistance | Help Desk            | Named Technical Assistance | Named Technical Assistance   |
|                               | Service Level           | 24/7*                      | 8/5                   |                     | 24/7*           | 12/7                       | 24/7*                | 12/7                       | 8/5                          |
|                               | Demo System             | OpenScape Business         |                       |                     | OpenScape 4000  |                            | OpenScape Enterprise |                            | OpenScape Enterprise Express |

\*This requirement can be fulfilled using an on-call system for after-hours support.

\*\* Allows for selling OpenScape Enterprise Express (OSEE) only

| Country Cluster 3<br>Criteria | OpenScape Business      |                            |                       | OpenScape 4000      |                 | OpenScape Enterprise       |                      |                            |                              |
|-------------------------------|-------------------------|----------------------------|-----------------------|---------------------|-----------------|----------------------------|----------------------|----------------------------|------------------------------|
|                               | Master                  | Professional               | Authorized            | Master              | Professional    | Master                     | Professional         | Authorized**               |                              |
| Certification                 | Sales                   | 2 Specialists              |                       | 1 Specialist        | 2 Specialists   |                            | 2 Specialists        |                            | 1 Specialist                 |
|                               | Technical Sales         |                            |                       | Recommended         | 1 Expert        |                            | 1 Expert             |                            | N/A                          |
|                               | Implementation Support  | 1 Expert                   | 1 Specialist          | N/A                 | 2 Experts       | 1 Specialist               | 2 Experts            | 2 Specialists              | 1 Associate                  |
| Commitment                    | Unify Sales Volume      | 150k Euro                  | N/A                   | N/A                 | 150k Euro       | N/A                        | 150k Euro            | N/A                        | N/A                          |
|                               | Additional Requirements | Master Criteria            | Professional Criteria | Authorized Criteria | Master Criteria | Professional Criteria      | Master Criteria      | Professional Criteria      | Authorized Criteria          |
| Services                      | Contact                 | Named Person               |                       | N/A                 | Named Person    |                            | Named Person         |                            | Named Person                 |
|                               | 1st Level Support       | Named Technical Assistance |                       |                     | Help Desk       | Named Technical Assistance | Help Desk            | Named Technical Assistance | Named Technical Assistance   |
|                               | Service Level           | 24/7*                      | 8/5                   |                     | 24/7*           | 12/7                       | 24/7*                | 12/7                       | 8/5                          |
|                               | Demo System             | OpenScape Business         |                       |                     | OpenScape 4000  |                            | OpenScape Enterprise |                            | OpenScape Enterprise Express |

\*This requirement can be fulfilled using an on-call system for after-hours support.

\*\* Allows for selling OpenScape Enterprise Express (OSEE) only

New Reseller Partners are permitted to sell Unify portfolio according to their chosen specialization as soon as they have completed the Sales certification requirements. Once all of the other specialization requirements in this program guide are fulfilled, submitted and approved by Unify, you will begin to accrue benefit according to the number of specializations, as detailed in the Economic Model (upfront discounts and backend rebates) and the respective additional benefits.

*A Partner may satisfy his Technical Sales, Implementation and Support requirements by purchasing the required Unify Resale Services.*

## Specialization Requirements

Specializations require a Partner to have a specified number of individuals who meet training & certification requirements for sales and technical capabilities, the service support capabilities and the necessary demo equipment as well as the business planning and review requirements stated above. Partners are allowed to purchase and offer the products and /or Services for which they have met and continually maintain the documented Specialization requirements within each country in the contractual territory.

## Certification

Certifications are applicable to the individuals within the Partner company who meet training requirements for sales and technical capabilities to support the selected Specialization. Unify Partners are only allowed to purchase and offer the products for which the Partner has met, and continually maintains, the documented Specialization requirements within each country the Partner is accredited to sell into.

*Note: Certifications are valid for two years and need to be renewed to maintain Specialization level and associated benefits.*

## Service requirements for a specialization level

- Technical interaction language: Technical interaction with Unify Services will take place in English.
- Service Contact (named person): A named contact person for interaction with the Unify Services division.
- Named Technical Assistance (1st Level Support): Our partners are expected to provide a named technical assistance person, who provides end-customer assistance and advice on the products and services.
- Service Level: Refers to providing 1st Level Support to your end customers in the defined time frame. (i.e. 8/5, 12/7). This requirement can be fulfilled using an on-call system for after-hours support.
- Service Escalation: In terms of Service Escalation we expect our partners to provide a clearly documented and efficient service escalation process to ensure the highest level of customer satisfaction.

**Master level partners are required to fulfill all criteria above plus the following:**

- Help Desk (1st Level Support): Our partners are expected to provide a help desk, which is a department inside their organization that is responsible for providing information, user support, troubleshoot problems and guidance on products and services towards the end-customer.
- Service Level: Refers to providing 1st Level Support to your end customers in a 24x7 time frame. This requirement can be fulfilled using an on-call system for after-hours support.

## Next Steps

1. Check the specialization requirements and note how many certified sales employees, technical sales engineers, and implementation and support engineers you need to require, for the chosen specialization level.
2. Access the [Unify Academy Portal](#) and view the available courses
3. Get certified: Register for and take the exam either online (sales) or in a secure environment via [www.pearsonvue.com](http://www.pearsonvue.com), our global test delivery partner.

## Extended Specializations

Depending on the opportunity, you may choose to extend your main specialization and offer unique solutions like Evidian, OpenScape Contact Center or Health Station HiMed. An Extended Specialization does not allow for additional breath discount within the economic model.

### OpenScape Contact Center

OpenScape Contact Center Enterprise comprises integrated, multi-channel contact center solutions featuring group based and advanced skills-based routing for the small, midsized and large contact center, with up to 1,500 active agents on a single side. Achieving a Contact Center Solutions specialization allows you to differentiate yourself as a best of breed expert in Contact Center solutions, enhancing credibility and reputation with your customers.

The extended specialization for contact center authorizes you to sell Contact Center within your respective specialization level for usage in the partner emblem is determined by the specialization level you have for OpenScape Enterprise / OpenScape 4000 / OpenScape Business. The extended specialization for OpenScape Contact Center is a consolidated 3 way specialization and includes the training/certification path for OpenScape Contact Center Agile, Enterprise and Campaign Director. To sell Contact Center within an OpenScape Enterprise Express package, no additional Extended Specialization is required.

For more information on the Extended Specialization for Contact Center visit the Partner Portal > [Program Details](#)

### Health Station HiMed

Health Station HiMed is a multimedia platform, deployed at the point of care, which grants communication, information and entertainment services to both hospital patients and staff.

For more information on the Extended Specialization for HiMed visit the Partner Portal > [Program Details](#)

### Evidian Access Services

Evidian Access Services being a market leading security software product, which automated login for web and legacy applications and enforces password policy and logs user access.

More information on the Extended Specialization for Evidian visit the Partner Portal > [Program Details](#)

## 6. Marketing Benefits

### Partner Emblem

Once you have achieved all the requirements of a specialization, you are entitled to use the Unify Partner emblem on your corporate Web site or marketing materials, to highlight accreditation, expertise and value to customers. This differentiates you in the market place and indicates that you have the specific Unify specialization expertise.

For more information, visit Partner Portal > [Partner Style Guide](#).

*Below is an example of the emblem:*



### Global Partner Locator

Our global Partner Locator tool, which you'll find on our corporate website, allows customers to search for partners by specialization and/or geographic market coverage. You benefit from a priority listing on the Partner Locator used by potential customers, who can immediately see what you're specialized in. The online listing of partners starts with the highest specialization level first.

For more information, visit [Unify.com](http://Unify.com) website.

### Unify Partner Portal

Unify offers Partners secure access to the Unify Partner Portal, which provides access to Partner Program materials, product information, sales and marketing tools, service resources, and other information to support Partner sales efforts. The content is updated regularly to give you the tools and resources you need to win more business with Unify products and solutions. You have access to a wide range of sales and marketing tools including brochures, datasheets, white papers, presentations, customer success stories and configuration tools. During the on-boarding process for certified Partners, we provide portal access to the primary contact within your company 'Primary Administrator'. Unify Partner Portal is available here [Partner Portal](#).

### Digital Channel

The Unify Digital Channel is a Software as a Service platform that you can use to provide information to customers, generate leads, and drive demand for Unify solutions. It's easy to use, so you don't need specialized marketing resources or expertise. It includes:

- **Web Content** – automatically displays up to 150 web pages of up-to-date, relevant product content, brochures, whitepapers, savings calculators, videos and reports on your web site.
- **Social Content** – automatically sends relevant tweets from your business Twitter account to your followers to help you increase your visibility and give you another customer touch point.
- **Campaign Content** – a library of ready-to-use campaigns that include your company logo, contact details and customized links to campaign landing pages on your web site. Powerful tracking and reporting tools enable you to analyze opens/click through results in real-time to monitor the effectiveness of your campaign.
- **Resource Center** – including product details, customer presentations, FAQs, customer letters, direct mail pieces, roll-up banners, posters, brochures and datasheets, including co-branded, online and print versions.

For more information, visit Partner Portal > [Digital Channel](#).

## PartnerCONNECT

Partner CONNECT is a secure web-based access to Unify's Partner Relationship Management system, GlobalONE, to help you manage your partner account, customer accounts, contacts, leads, deals, and opportunities. You can use PartnerCONNECT to register deals and request special pricing if you're working on a large deal.

## Communications

To keep our Partners up-to-date on Unify product, technology, services, and sales and marketing activities, you are provided with the following resources; Monthly Newsletter; Strategic Executive Meetings; Unify Partner Conference; TechConnect, surveys, webcasts & Marketing Blog. Contact your Account Manager for more details.

You can download, distribute and print a wide variety of sales and marketing collateral, such as data sheets, brochures and the other types of materials listed below. Just go to the Product Information section on the Unify Partner Portal to download what you need free of charge. If not already happened, sign up for the Partner Newsletter.

If you want to produce and distribute a press release announcing your partnership with Unify or significant customer wins, we'll be happy to help. Please note that all releases mentioning Unify must be approved by us before distribution.

## Unify generated Sales Leads

Through Unify generated marketing programs, such as advertising, e-mail campaigns, seminars and tradeshows, Unify drives demand for collaborative communications products and solutions. Unify Partners are eligible to receive qualified and unqualified leads from these Unify driven activities. Leads are distributed to partners based on geographical location and optimal match between the customer's requirements and the partner's accreditation, competency, experience, and solution focus. If all the criteria are equal, the lead may be sent to several partners.

Once you receive a lead, you must commit to doing the following:

- Contact the lead within 48 hours.
- Provide regular feedback on how the lead is progressing.
- Ensure a Unify solution is included in the engagement.
- Conduct a customer satisfaction survey and forward it to Unify at the end of the engagement.

## MarketingCONNECT

Unify's MarketingCONNECT provides Partners with access to marketing services such as telemarketing, Sales Acceleration Days (Sales Training), print/collateral services and creative development enabling you to focus more effectively on growing your business. The marketing services can be provided at competitive rates, by carefully selected marketing agencies, many of whom are preferred suppliers to Unify.

## Sales and Marketing Collateral

You can download, distribute and print a wide variety of sales and marketing collateral, such as data sheets, brochures and the other types of materials listed below. Just go to the Product Information section on the Unify Partner Portal to download what you need free of charge.

- **Portfolio brochures** describe the features and benefits of the portfolio products you're selling
- **Sales playbooks** are overviews of sales scenarios to help you prepare for customer meetings
- **Customer presentations:** ready-to-use presentations you can use at customer meetings
- **Customer references:** choose references in the same industry as your prospect

- **Analyst reports** are useful for positioning Unify solutions and showing customers an independent assessment of Unify and its competitors. Please note that you may need to license a report or obtain permission to reproduce it from the analyst firm and some reports may not be available for reproduction and co-branding
- **Case studies** are always useful for prospects to see how similar organizations benefit from Unify solutions
- **White papers** describe the technical and business benefits of Unify solutions in more depth.

## Competitive Intelligence

Over the years, we've collected plenty of information about competitors that helps you position the Unify offering with customers and answer their questions about how Unify relates to other providers. This information includes comparisons of strengths, weaknesses, offerings, investment options and market differentiators as solid sales argumentation tools.

## Executive Briefing Centers

Master level partners can use our Executive Briefing Centers for key prospects and customers. They provide state-of-the-art facilities that provide an impressive backdrop to help you advance and win the deal. Depending on the customer and the event, your channel account manager and/or the local Unify account team may co-host the event, with the option to invite Unify senior executives to participate as well. Your Unify channel account manager and the Executive Briefing Center team will work with you to develop an effective program for the event.

# 7. Resources - Your Unify Team

## Account Manager

Once you achieve the requirements of your chosen specialization level, you will be assigned a Unify channel account manager who will be on hand to answer any queries you may have and act as your advocate within Unify. They can help you in the following ways:

- Support you win customer projects.
- Assist with business planning, forecasting and account planning.
- Coordinate training and help you achieve the specializations and certifications.
- Assist with marketing planning and execution.
- Providing support throughout the entire sales cycle, including coordinating executive briefings.
- Escalations within Unify.

## Pre-Sales Support

Unify provides technical support services and resources covering both hardware and software in order to provide first-class support. Unify partners have access to our secure support [Pre-sales Knowledge Base](#) offering product documentation, FAQs, data sheets and TechConnect.

For more information visit [Partner Portal](#)> Sell > Presales & Bid Support. For large or complex deal, our global pre-sales support team can participate in customer meetings, provide customized presentations and help you put together the best Unify solution.

Presales Support for Professional and Master level include the above plus:

- Support for complex projects; our pre-sales will work with you to design complex solutions, develop business cases and migration design and planning.
- RFP support
- Customer pre-sales support; Participate in customer meetings, provide customized presentations and help you put together the best solution for the customer's needs.
- Technical partner days; access to our experts to discuss trends, issues and portfolio roadmap.

**Note:** Pre-sales support for complex projects, RFP support and onsite pre-sales support may be charged on a time and material basis. Please contact your Account Manager for more information.

## Services Delivery Manager

Once you achieve the requirements of a Professional or Master Level of the program, you will be assigned a Unify Service Delivery Manager. They will support you in the following ways:

- Service Business Planning and Support.
- Follow-up on strategic operational issues and take action to reduce / minimize impact.
- Escalation Management.



# 8. Program Rules

## 1. Authorization to sell / contractual products

Partners must complete the minimum specialization level within a specialization, in order to resell respective Unify solutions. Please refer to [Appendix A](#).

## 2. Partner off-boarding

Partners, who have not traded Unify Portfolio for at least 12 months, will be automatically off-boarded. If they want to sell Unify Portfolio in the future, Partners need to register again under [unify.com](http://unify.com) to become a Unify Reseller.

## 3. Partner Approval - New Partners

New partners are permitted to sell their Unify portfolio according to their chosen specialization as soon as they have completed the certification requirements for sales. By the time all of the other specialization level requirements in this program guide are fulfilled, [submitted](#) and approved by Unify, you benefit from your specialization level according to the [Economic Model](#) (upfront discounts and backend rebates) and the respective additional benefits.

## 4. Specialization level uplift / downgrade

Specialization levels are reviewed on a monthly basis. Partners who no longer comply with their current specialization level will be granted a grace period of 90 days to fulfill the respective requirements again before being downgraded to the next lower specialization level. Partners will be informed 90 / 60 and 30 days in advanced. Upgrades and downgrades will always become effective from the 1st day of the following month.

## 5. Certifications of Employees Changing Companies

The Unify certifications of an employee who leaves an existing Unify partner in good standing will not count at his/her new employer for a period of 180 days following the date the qualified employee left the first company. However, once this 180-day moratorium has expired, the new employer may include their new hire's Unify certifications to meet Unify Partner Program requirements. If the hired individual has been laid off by another partner or Unify, the new employer may count the credentials of that person as soon as they are hired. Unify reserves the right to adapt this timeframe.

## 6. Partner Employee Attrition

Should a partner's total number of certified staff drop below the minimum required by the Unify Partner Program due to employee attrition, that partner would then have 90 days from the date the employee(s) left the company to provide the required number of certified staff. After this grace period, partners who no longer comply will be downgraded to the next lower specialization level. Unify can give the partner an additional period to achieve the certificates required to meet the Partner Program's criteria. However, Unify is not obliged to do this. In order to continuously benefit from discounts and backend rebates, it is the partner's duty to notify Unify via email to: [PartnerProgram@unify.com](mailto:PartnerProgram@unify.com) immediately when a certified individual leaves their company.

### 7. Certification availability

If a partner is unable to provide a certificate required for his/her Unify specialization for reasons beyond their control, Unify reserves the right to allow the partner to produce the lower level certificate or proof of attendance at the relevant training courses to achieve or keep their specialization level.

### 8. Eligibility for Specialization Level

In exceptional circumstances, Unify reserves the right to accept sub-contracted implementation and support engineer certificates for a limited time, provided proof of the required certification and contractual agreement is available.

### 9. Rules of Engagement for Channel Partners

At Unify, we firmly believe that retaining satisfied customers and achieving steady growth is dependent upon a strong commitment to supporting and collaborating with our channel partners. To that end, Unify has formalized Rules of Engagement to guide our sales teams and partners when pursuing sales opportunities in certain countries. The Rules of Engagement outline the roles, commitments and expectations for Unify and our channel partners throughout the sales engagement process and will be provided to partners upon request.

### 10. (Calculated) Reseller Net Purchase Price/Volume – base calculation for rebate calculations

|  |   |
|--|---|
| The 1-tier Reseller net purchase price is calculated, as follows:      |   |
| Unify Global List Price for portfolio purchased                        |   |
| <b>Subtract</b>  | <ul style="list-style-type: none"> <li>• Portfolio base discount</li> <li>• Contractual discounts (Incoterms, payment terms) – <b>Applicable to 1-tier Resellers ONLY</b></li> <li>• Specialization level discount</li> <li>• Breadth discount (where applicable)</li> <li>• Product cluster discount in mature/emerging markets</li> <li>• Additional incremental special bid rebates</li> <li>• Promotions</li> </ul> |
| <b>= The resulting number is " 1-tier Reseller Net Purchase Price"</b> |   |

The Calculated Reseller Net Purchase Price for portfolio products, sourced from a Unify accredited distributor are calculated by Unify, based on sales-out information provided by the distributor. Items ordered from Unify or reported on sales-out reports from a Unify accredited distributor will count toward the Calculated Reseller Net Purchase Price.

|  |  |
|--|--|
| The 2-tier Reseller net purchase price is calculated, as follows:      |  |
| Unify Global List Price for portfolio purchased                        |  |
| <b>Subtract</b>  | <ul style="list-style-type: none"> <li>• Portfolio base discount</li> <li>• Specialization level discount</li> <li>• Breadth discount (where applicable)</li> <li>• Product cluster discount in mature/emerging markets</li> <li>• Additional incremental special bid rebates</li> <li>• Promotions</li> </ul> |
| <b>= The resulting number is " 2-tier Reseller Net Purchase Price"</b> |  |

***Disclaimer:** If a change in the claim (negative or positive) is identified after partner net revenue has been reported, Unify reserves the right to adjust the partner's results in the following months and to the degree necessary, as well as to adjust the partner program status and funds accrued from previously reported partner net revenue. The total amount of rebates paid will be reduced by any amounts in arrears (overdue receivables) to Unify. Unify reserves the right to subtract special bid projects (upfront and backend credits) on heavily discounted deals.*

### **11. Forecast process and end-customer reporting**

Partners at the Professional or Master specialization level are obliged to provide a forecast to Unify on a quarterly basis. Forecasting takes place with the respective Unify Channel Account Manager. In addition, resellers need to provide end customer information to Unify when applying for special bid discounts and resale services.

### **12. Warranty**

The warranty process will be handled from the partner's source of purchase. For equipment purchased directly from Unify, please see the description on the partner portal

### **13. Customer Satisfaction Surveys**

Customer satisfaction surveys provide an easy mechanism for customers to provide feedback. The information obtained from your customer will provide opportunities for improvements, open doors for communication, and encourage customer relationships. Consistent communication with customers leads to a better relationship, which in turn leads to retentions and customer loyalty.

# Appendix A

| Contractual Products and Services |          |   | Specialization level in order to resell |              |        |
|-----------------------------------|----------|---|---|--------------|--------|
| Portfolio Cluster                 | PSEG     | Description                                       | Authorized                              | Professional | Master |
| 3rd Party                         | OEM_3RDP | OEM and Third Party <sup>1)</sup>                 | x                                       | x            | x      |
| Applications                      | CONCECRM | Contact Center/CRM <sup>1)</sup>                  |   | x            | x      |
|                                   | CONCEN3P | Contact Center Third Party Products <sup>1)</sup> |   | x            | x      |
|                                   | MGTAPPLI | Management Applications <sup>1)</sup>             | x                                       | x            | x      |
|                                   | OELASWCC | Enterprise Licensing Contact Center Software      |   | x            | x      |
| Circuit                           | CIRCTSSL | Circuit SSL                                       | x                                       |              |        |
|                                   | CIRCU_HW | Circuit HW  | x                                       |              |        |
| Cordless                          | CORDLESS | Cordless<br>(DECT Infrastructure w/o Devices)     | x                                       | x            | x      |
| Devices                           | CPDEV_IP | OpenScope CP Devices IP                           | x                                       | x            | x      |
|                                   | CPDEVACC | OpenScope CP Devices Accessories                  | x                                       | x            | x      |
|                                   | MOBIDEVI | Mobile Devices                                    | x                                       | x            | x      |
|                                   | STAGE_IP | OpenStage Devices IP                              | x                                       | x            | x      |
|                                   | STAGEACC | OpenStage Accessories                             | x                                       | x            | x      |
|                                   | STAGETDM | OpenStage Devices TDM                             | x                                       | x            | x      |
| Evidian                           | ATOS_EVD | Evidian SSO*                                      | x                                       | x            | x      |
| GetCurrent                        | GETC_IC4 | GetCurrent OS 4000                                |   | x            | x      |
|                                   | GETC_ICO | GetCurrent ICO <sup>1)</sup>                      |   | x            | x      |
| Health                            | SAGHIMED | HiMed* <sup>2)</sup>                              |   | x            | x      |
|                                   | SAGACCES | MedAccessories* <sup>2)</sup>                     |   | x            | x      |
| Large Enterprise                  | HP4000HW | HiPath 4000 HW                                    |   | x            | x      |
|                                   | HP4000SW | HiPath 4000 SW                                    |   | x            | x      |
|                                   | OPSCUC3P | OpenScope Communications 3rd Party                |   | x            | x      |
|                                   | OPSCUCHW | OpenScope Communications HW                       | (x)                                     | x            | x      |
|                                   | OPSCUCSW | OpenScope Communications SW                       | (x)                                     | x            | x      |
|                                   | OPSELASW | OpenScope Enterprise License SW                   | (x)                                     | x            | x      |

(x) = Authorized level: OpenScope Enterprise Express Only

\* = released in dedicated countries only.

<sup>1)</sup> Depends on platform

<sup>2)</sup> Country specific requirements

**NOTE:** You must complete the minimum specialization level within a specialization in order to resell the respective Portfolio.

| Contractual Products and Services |                      |   | Specialization level in order to resell |              |        |
|-----------------------------------|----------------------|---|---|--------------|--------|
| Portfolio Cluster                 | PSEG                 | Description                                     | Authorized                              | Professional | Master |
| Others                            | XOTHERSX             | Others <sup>1)</sup>                            | x                                       | x            | x      |
| Services                          | PROFSERV             | Professional Services*                          | x                                       | x            | x      |
|                                   | SERV_INSTALL         | Installation Services*                          | x                                       | x            | x      |
|                                   | SERV_MTC             | Maintenance Services*                           | x                                       | x            | x      |
|                                   | SERVAPPL             | Service Applications                            | x                                       | x            | x      |
|                                   | SERVICES             | Services  | x                                       | x            | x      |
| OpenScape Business                | OSBHWEQT             | OpenScape Business TDM Boards                   | x                                       | x            | x      |
|                                   | OSBHWEQU             | OpenScape Business IP/UC Boards                 | x                                       | x            | x      |
|                                   | OSBHWSY1             | OpenScape Business Systems X1                   | x                                       | x            | x      |
|                                   | OSBHWSYS             | OpenScape Business Systems X3, X5, X8           | x                                       | x            | x      |
|                                   | OSBSWSSL             | OpenScape Business PAYGO Subscription Licensing | x                                       | x            | x      |
|                                   | OSBSWTDM             | OpenScape Business TDM Licenses                 | x                                       | x            | x      |
|                                   | OSBSWXCC             | OpenScape Business Contact Center licenses      | x                                       | x            | x      |
|                                   | OSBSWXSX             | OpenScape Business Software/Apps                | x                                       | x            | x      |
|                                   | OSBSWXTL             | OpenScape Business TDM licenses                 | x                                       | x            | x      |
|                                   | OSBSWXUL             | OpenScape Business IP/UC licenses               | x                                       | x            | x      |
|                                   | OSBSYUPD             | OpenScape Business HW upgrade                   | x                                       | x            | x      |
|                                   | OSEEXPSW             | OpenScape Enterprise Express Software           | x                                       | x            | x      |
| SMBAPPLI                          | Applications for SMB | x   | x                                       | X            |        |

\* = released in dedicated countries only.

<sup>1)</sup> Depends on platform

<sup>2)</sup> Country specific requirements

*NOTE: You must complete the minimum specialization level within a specialization in order to resell the respective Unify Portfolio.*

| Contractual Products and Services |          |   | Specialization level in order to resell |              |        |
|-----------------------------------|----------|---|---|--------------|--------|
| Portfolio Cluster                 | PSEG     | Description                                     | Authorized                              | Professional | Master |
| Software Subscription             | SW_SUBSC | Software Subscription                           | (x)                                     | x            | x      |
| Software Support                  | SERV_IC2 | Software Support OpenScape                      | x                                       | x            | x      |
|                                   | SERV_IC3 | Software Support OpenScape Business             | x                                       | x            | x      |
|                                   | SERV_IC4 | Software Support OpenScape 4000                 |   | x            | x      |
|                                   | SERV_IC5 | Software Support OpenScape Voice + Applications | (x)                                     | x            | x      |
|                                   | SERV_IC6 | Software Support Applications                   | x                                       | x            | x      |
|                                   | SERV_IC7 | Software Support OpenScape Enterprise Express   | (x)                                     | x            | x      |
|                                   | SERV_IC8 | Software Support Evidian SSO                    | x                                       | x            | x      |
| Spareparts                        | SPAREPAR | Spareparts <sup>1)</sup>                        | x                                       | x            | x      |
| SW Upgrades                       | SW_UPGRA | Software Upgrades <sup>1)</sup>                 | x                                       | x            | x      |
| Trading / Dispatching             | TRAD_DIS | Trading/Dispatching                             | x                                       | x            | x      |
| Unified Comms                     | UNIFCOMM | Unified Communications <sup>1)</sup>            |   | x            | x      |
| Wireless                          | WLANAPPL | Wireless (Applications)                         | x                                       | x            | x      |
|                                   | WLANINFR | Wireless (WLAN Infrastructure w/o Devices)      | x                                       | x            | x      |

(x) = Authorized level: OpenScape Enterprise Express Only

<sup>1)</sup> Depends on platform

<sup>2)</sup> Country specific requirements

*NOTE: You must complete the minimum specialization level within a specialization in order to resell the respective Unify Portfolio.*

In addition to the above PSEG elements, Unify accredited distributors might sell Unify products which are already phased out by Unify and can be no longer ordered directly.

# Appendix B

## Country Cluster Overview

| Country Clusters | Countries in the Cluster Groups   |
|------------------|---|
| 1                | Germany, UK   |
| 2                | Austria, Australia, Belgium, Canada, China, Denmark, Finland, France, Hong Kong, Italy, Liechtenstein, Luxembourg, Monaco, Netherlands, New Zealand, Philippines, Poland, Russia, Singapore, South Korea, Spain, Sweden, Switzerland, USA |
| 3                | Rest of World   |

## About Unify

Unify is the Atos brand for communication and collaboration solutions. At the core of the Atos Digital Workplace portfolio, Unify technology enables organizations of all sizes to transform the way they collaborate, creating a more connected and productive workforce which can dramatically improve team performance, individual engagement and business efficiency.

Unify products represent a strong heritage of technology innovation, reliability and flexibility. Their award-winning intuitive user experience can be delivered through almost any device and in any combination of cloud or on-premise deployment. Augmented by Atos' secure digital platforms, vertical solutions and transformation services, they set the global standard for a rich and reliable collaboration experience that empowers teams to deliver extraordinary results.

[unify.com](http://unify.com)



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