

## SonicWall SecureFirst Marketing Development Funds Program

The SonicWall SecureFirst Marketing Development Funds (“MDF Program”) enables authorized distributors and certified resellers of SonicWall (“Partners”) to take advantage of marketing funds to support the building the growth of the SonicWall brand, demand generation and other relevant activities. Partners that are approved by SonicWall at the Gold or Platinum, DMR Gold or DMR Platinum levels in the SonicWall SecureFirst Partner Program may participate in the MDF Program with preference given to the higher-level tiers. The program may be extended to Silver partners at SonicWall’s sole discretion.

The MDF Program is intended to help Partners succeed in today’s competitive environment. We believe that Partners who work closely with SonicWall’s account teams to develop strong business plans will be more likely experience growth quarter over quarter in the sale of SonicWall products and services. For this reason, under the MDF Program, SonicWall requires Partners to participate in the business planning process with their SonicWall account team and the plan must be approved by SonicWall.

This guide explains how to apply for the MDF Program, how to use MDF Program funds that may be available, and how to navigate the MDF Program process. It is the Partner’s responsibility to be familiar with and adhere to requirements outlined in this guide and as may be provided by SonicWall to its Partners from time to time.

### Who is eligible?

In order to be eligible to participate in the MDF Program, Partners must:

- Complete and submit a business plan based on the timeline stipulated within the SecureFirst Partner Program for your partner tier. This business plan is subject to SonicWall’s approval.
- Execute and complete marketing campaigns through SonicWall
- Ensure it is compliant with SonicWall’s requests and programs including but not limited to its “Not for Resale” product program.
- Must have an active purchase and sales history with SonicWall products in the immediately preceding quarter as determined by SonicWall.
- Complete at least 25% of its Continuing Education Rewards (CER) points each quarter. For Gold and Platinum, complete at least one CSSP/SNSP certification by July 31st annually. This may vary by country.

### How does it work?

Step 1: Secure Approval via MDF Request

Step 2: Perform your activity

Step 3: Submit the MDF Claim incl. proof of execution

## Step 1: Secure Approval via MDF Request

The MDF Program requires that Partners secure pre-approval for the MDF activity from SonicWall and directly pay the costs associated with conducting the marketing activity up front.

SonicWall will then reimburse Partners through the MDF Program. Reimbursements are calculated at a pre-designated level and are intended to assist in covering the MDF activity including training costs.

The MDF Program does not allow for pre-payment or direct payment to 3rd party vendors for marketing or training activities.

Once formal approval for a marketing activity has been provided by SonicWall to a Partner, the Partner is then free to pursue the marketing activity within the time period agreed upon by the parties.

### What activities may be eligible for the MDF Program?

1. Lead Generation/ Telemarketing
2. Marketing Materials/ Branded Merchandise
3. Email/ Website Development
4. Sales Incentives, Contests, SPIFFs
5. DMR and Distributor Quarterly Marketing Activities
6. Event Sponsorship/ Tradeshows
7. Product Champion
8. Event Sponsorship/ Tradeshows
9. Partner Certification Training (availability varies by country/region/case)
10. Sales Enablement Workshops/ Inside Training

### What activities are ineligible for the SonicWall SecureFirst MDF Program?

See Appendix A.

The list in Appendix A not all-inclusive. Please see the individual activity requirements located in this guide. SonicWall reserves the right to revise or modify activities and associated requirements in its sole discretion.

Please contact SonicWall if you have questions regarding the eligibility of activities for the MDF Program: [mdf@sonicwall.com](mailto:mdf@sonicwall.com).

All MDF activity requests ("Fund Requests") must be submitted through the SonicWall SecureFirst Partner Portal

for approval by a SonicWall authorized representative at least 10 business days prior to commencement of the activity. All activities must be approved via Fund Request in the SonicWall SecureFirst Partner Portal before the activity begins. All Fund Requests must reference the requirements for each individual activity listed in the request. Approval of funds to support the requested activity and the determination of estimated return on investment (ROI) is entirely at the discretion of SonicWall. Approval of MDF Program requests will, in part, be dependent upon the potential ROI for the activity. The user of the SonicWall Portal submitting the request will be notified by e-mail whether the request has been approved.

SonicWall will not reimburse a Partner for any activity that does not have an approved Fund Request.

Fund Requests may be denied for the following reasons:

- A business plan was not provided or was not complete.
- Activity is determined by SonicWall to be ineligible for MDF Program funding.
- Amount requested does not provide sufficient ROI.
- All available MDF Program funds are exhausted because the funds have allocated to other activities.
- The proposed activity was determined by SonicWall as unsuccessful previously.
- The request was not submitted at least 10 business days prior to the start of the activity or otherwise failed to meet the requirements outlined in this guide or as may be required by SonicWall from time to time.
- SonicWall believes Partner may be in breach of any its obligations to SonicWall or has engaged in activities that may subject SonicWall to liability.

## Step 2: Perform your activity

Once you have received the email authorization from SonicWall you can execute your planned activities.

Upon completion of the marketing activities, Partners are required to submit a claim for reimbursement with legitimate proof of performance (POP). All POPs are subject to SonicWall's approval.

## Step 3: Submit a claim

MDF claims ("Fund Claims") must be submitted against the approved Fund Request within 90 days of the activity end date. After 90 days, a Fund Request will be designated as "closed" and no further Fund Claims for the activity may

be submitted. The Fund Request will also be designated as "Closed" once all approved funds have been allocated to Fund Claim(s). SonicWall reserves the right to audit and require such documentation and other evidence to confirm Partner's compliance.

The following list of requirements applies to all SonicWall claim submissions:

- Activity is allowed under program guidelines.
- Complete and accurate POP is provided.
- Accurate invoices submitted to substantiate the total claim amount.
- All activities prominently feature and/or promote SonicWall and/or its products.
- SonicWall logo guidelines were strictly adhered to (authorized logos are available from your SonicWall Channel Account Manager).
- SonicWall information presented is accurate and verifiable.

**Additional information that is needed to submit a claim includes:**

- The MDF Request number provided upon approval of the request by SonicWall.
- All activity invoices, rate cards, and POP materials as outlined in this guide or as otherwise required by SonicWall.
- A "rate card" is a document containing prices and descriptions for the various marketing options available from a marketing provider.
- Copies of passing grade or certificates of completion for any training courses. MDF will only be paid against passing grades (if applicable) or certifications of completion.

**Invoice Requirements**

- **EU Distributors and Partners** must include an invoice issued to Please change to SonicWall International DAC, 2300B, Building 2000, City Gate, Mahon Cork, T12 E2XW, Ireland VAT No IE3415772AH on all Fund Claims submitted in the SecureFirst Portal. This invoice does not replace and is in addition to the required POP.

- **Non-EU Distributors and Partners in EMEA, Asia, Australia, Caribbean, Mexico & South America (excluding Brazil)** must include an invoice issued to SonicWall International DAC, 2300B, Building 2000, City Gate, Mahon Cork, T12 E2XW, Ireland VAT No IE3415772AH on all Fund Claims submitted in the SecureFirst Portal. This invoice does not replace and is in addition to the required POP.
- **Distributors and Partners in the US, Brazil and Canada** must include an invoice issued to SonicWall Inc. 1033 McCarthy Blvd., Milpitas, CA 95035, on all Fund Claims submitted in the SecureFirst Portal. This invoice does not replace and is in addition to the required POP.

The Partner is responsible for all income, sales, value-added, and other taxes on MDF amounts received. SonicWall does not reimburse income, sales, or other taxes through its MDF Program.

SonicWall does not refund VAT (Value Added Tax) except in the following situation:

- Partners within countries that do not have a government program to reimburse business for VAT, such as: Australia, Brazil (known as IVA), Canada, China, Japan, New Zealand, India, UAE, Vietnam.

**Fund Claim Status**

Fund Claims may be in Draft, Submitted, Approved, Rejected or Paid status for the following reasons:

- **Draft:** Hasn't been submitted for approval; file attachment missing on the claim form. It is the Partner's responsibility to monitor and provide the necessary information and documentation for any Fund Claim before the deadline date for the claim that is shown on the Fund Request. Failure to do so could result in your Fund Claim being denied or expired.
- **Submitted:** Pending approval, awaiting audit.
- **Approved:** Authorized by SonicWall for execution and reimbursement.
- **Rejected:** Non-eligible, violation of the MDF Program guidelines or other SonicWall policy or requirement.
- **Paid:** Payment has been issued to Partner.

## Error resolution

If a Partner believes an error has been made in auditing a claim, the Partner must report it to the SonicWall SecureFirst MDF Program Support team via e-mail within 60 days of the date the claim was audited, or the statement was received. Failure to report a problem within this 60-day window will result in loss of opportunity for an adjustment to the account. Partners may contact MDF Program Support at: [mdf@sonicwall.com](mailto:mdf@sonicwall.com)

## Reimbursement

- MDF claims may not be for more than the total amount previously approved by SonicWall and/or for more than the amount the Partner actually paid for the activity or more than the amount designated by an approved rate card. Claims will only be reimbursed for up to the approved amount. Only eligible activities will be processed for reimbursement. Claims will not be reimbursed if the claim is not submitted into the SonicWall Partner Portal.
- Partner must submit an MDF claim after the activity has been completed and before the MDF request expires (90 days after activity end date). After logging into the SonicWall Partner Portal, Partners must access the MDF section and open the previously approved MDF request to submit the relevant claims. All documentation and POP should be uploaded to the online claim form.
- Reimbursement to DMR Gold, DMR Platinum, and Distribution Partners will be up to 100% of the requested funding based on performance with respect to ROI and relevant POP. Partners may not deduct or offset MDF claim amounts from other amounts due and payable to SonicWall. In such cases, penalties may apply. Reimbursement to Silver, Gold and Platinum partners will be up to 50% of the requested funding based on performance with respect to ROI and relevant POP in SonicWall's sole discretion.

Completely documented claims typically take 60 days from the date of approval to be audited and processed for payment.

Partners who do not purchase products or services directly from SonicWall and are located outside North America may be paid by wire transfer in the local currency selected in the MDF request. North America partners will be paid only in U.S. Dollars by check. Distributors and partners who purchase products and services directly from SonicWall are paid only via credit memo in USD.

Payments will NOT be made to Third party vendors. System notification e-mails will be sent to the claim creator should any documentation be missing or incomplete.

If a Partner has been approved for and allocated a designated amount of MDF Program funds but does not use the full MDF allocation the MDF allocation may not be carried over from quarter to quarter or to another activity.

Partners are responsible for ensuring the account information provided to SonicWall is up to date and accurate. SonicWall is not responsible for errors.

## Where do I find further information?

Log into the [SonicWall Secure First Partner Portal](#) and go to the MDF page to find

- [MDF Guidelines](#)
- [MDF Cheat Sheet](#)
- [MDF Video Tutorial](#)

## SonicWall SecureFirst MDF Claim Requirements by Activity Type

Qualifying Activity Or Event	Type	Proof Of Performance
<b>Lead Generation/ Telemarketing</b>	Programs designed to help Partners create sales leads with the purpose of acquiring new customers, upselling, or cross-selling existing customers.	<ul style="list-style-type: none"> <li>• Third party invoice. Rate cards if done internally.</li> <li>• Copy of script with SonicWall mentioned.</li> <li>• Campaign report from vendor including the # of calls, results summary and list of companies that were targeted.</li> <li>• In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Marketing Materials/ Branded Merchandise</b>	Co-branded marketing materials to promote sales of SonicWall offers.	<ul style="list-style-type: none"> <li>• Third party invoices or receipts showing total charges for merchandise or services provided. Rate cards if done internally.</li> <li>• Photo of co-branded merchandise marketing materials/collaterals showcasing SonicWall brand.</li> <li>• In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Email/Website Development</b>	<p>Development that enables a Partner's website functionality with respect to marketing programs that accelerate the growth of SonicWall offers online.</p> <p>Email blasts</p>	<ul style="list-style-type: none"> <li>• Third party invoice showing total costs incurred for website development required that is specifically tied to SonicWall messaging or SonicWall solutions. Rate card if done internally.</li> <li>• Copy of email or ad, screen shot of banner/signage.</li> <li>• Screen shots of before and after page(s).</li> <li>• In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Sales Incentives, Contests, SPIFFs</b>	Designed specifically for the Partner's sales organization to effectively promote SonicWall offers. Availability varies by country/region. Local rules and restrictions apply and are subject to discontinuance without notice.	<ul style="list-style-type: none"> <li>• Third party invoice or receipt for prizes/vouchers and/or cost to create promotional material for same. Only actual cost will be reimbursed.</li> <li>• Rate cards if done internally.</li> <li>• Program/promotion flyer or email announcement used to promote the sales program.</li> <li>• Description of planned incentive, rules of how to earn the incentive, results to date.</li> <li>• Provide reporting with number of participants and number of winners in Excel format.</li> <li>• In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>

## SonicWall SecureFirst MDF Claim Requirements by Activity Type, cont'd

Qualifying Activity Or Event	Type	Proof Of Performance
<b>DMR and distributor quarterly marketing activities</b>	Multiple marketing activities spanning at least one quarter. Distributor and DMR tiers only.	<ul style="list-style-type: none"> <li>Marketing plans complete with cost breakdown by line and dates.</li> <li>Third party invoices or receipts for reimbursable expenses. Rate cards if done internally.</li> <li>Appropriate POP (as listed in this table) for each activity (see activity type for each)</li> <li>In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Product Champion</b>	SonicWall champion/ Funded Head. Availability varies by country/region.	<ul style="list-style-type: none"> <li>Invoice for sponsorship fee/services rendered</li> <li>Copy of contract with name of Funded Head one for each employee</li> <li>Completed accomplishments/status overview from manager submitted with each claim</li> </ul>
<b>Event Sponsorships/ Tradeshows</b>	Display of SonicWall products at trade shows, in conjunction with the Partner's value-add offers. Up to 50% of the event costs may be shared with the Partner subject to approval. (Note, MDF Program funds may be reduced if the Partner is also promoting a competitor's or multi-vendor solutions at the event.)	<ul style="list-style-type: none"> <li>Third party invoice showing total costs incurred for all reimbursable expenses. Rate card if done internally</li> <li>Photo showing SonicWall representation at the event, in the booth, and on any other promotional items used</li> <li>Copy of event invitation/email</li> <li>Event report including the # of registrations/ attendees/visitors and a list of companies that attended the event or visited the booth.</li> <li>In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Partner Certification Training</b>	<p>Programs and events designed to help employees of a Partner acquire material knowledge and training about SonicWall offers.</p> <p>Availability varies by country/ region/case.</p>	<ul style="list-style-type: none"> <li>Third party invoice or receipt for training from authorized training partner or distributor if purchased as a SKU.</li> <li>List of partner reps who attended the event.</li> <li>Copy of training materials used.</li> <li>Copy of passing grade/certificate.</li> <li>In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>
<b>Sales Enablement Workshops/Inside Training</b>	Selling workshop/inside training/ seminars/ webinars/floor days	<ul style="list-style-type: none"> <li>Third party invoice. Rate cards if done internally.</li> <li>Photo of event with SonicWall logo visible</li> <li>Copy of event invitation/agenda/email</li> <li>Provide reporting with number of registrations, number of attendees, number of companies represented.</li> <li>In addition, an invoice issued to SonicWall is required, please refer to the section "Invoice Requirements" for more detail.</li> </ul>



### Program disclaimer

SonicWall MDF funds are provided solely at the discretion of SonicWall to help increase the sales of SonicWall products. To receive SonicWall MDF funds, Partners must be eligible for MDF, a current authorized SonicWall SecureFirst Partner, and must comply with these guidelines as well as all other applicable terms and conditions. Failure to comply or to have an applicable agreement in place may result in any MDF claims to be rejected and/or approved funds forfeited. Any continued participation in the MDF Program requires that the integrity of the SonicWall brand be maintained. Actions considered to be detrimental to the integrity of the SonicWall brand may result in termination of a Partner's participation in the MDF Program.

SonicWall has the sole discretion to decide matters concerning compliance with the guidelines of the program, eligibility of expenses for reimbursement and other matters concerning the MDF Program. SonicWall reserves the right to revise or terminate this program at any time.

\*Any use of pre-printed forms, such as purchase orders, invoices, etc., are for convenience only, and any pre-printed terms set forth therein shall not apply and shall be given no force and effect.

For more information, please send an email to: [mdf@sonicwall.com](mailto:mdf@sonicwall.com)

## Appendix A

Activities that do not qualify for MDF reimbursement from SonicWall include, but are not limited to, the following:

- Discounts for SonicWall products or services
- Activities not connected to SonicWall product sales (i.e. sporting/ team building events)
- Equipment for supporting normal business operations.
- Non-SonicWall software.
- Not for Resale Product/ Demo equipment
- General purchase of sporting event admission fees.
- General customer appreciation events or entertainment for end users.
- Customer gifts not connected to a campaign
- Partner President's Clubs.
- Travel or lodging expenses, unless pre-approved by SonicWall.
- Gifts, Gratuities, or Entertainment.
- Costs to develop marketing materials that don't include SonicWall offers or brands.
- Cash
- Association membership fees.
- Non-SonicWall certification(s) training costs.
- Partner travel costs to attend training events.
- Other sales or technical training courses outside of SonicWall Partner authorization training.
- Fees to take certification tests without taking applicable training.
- Non-SonicWall business activities, functions, or programs.
- Billboard signage.
- SonicWall owned partner conferences and events
- Capitalized equipment.
- Events that do not include SonicWall business units.
- Fees to attend trade shows where the Partner is not displaying SonicWall products.
- Illegal activities.
- Partner's business expenses that include company business cards, company stationary or forms.
- Property costs
  - » Equipment, including hardware or software unless pre-approved by SonicWall.
  - » Furniture. Employee benefits. Employee taxes.
  - » Employee sales/training meetings. Other internal company meetings. Donations to charitable organizations.
  - » Employee recruitment (e.g., job fairs, help wanted ads).
  - » Booth at SonicWall events.
  - » Legal, tax consulting, or accounting fees. Telephone expenses/ charges.
- Cancellation Expenses as a result of non- execution of the activity by the Partner.

## About SonicWall

SonicWall delivers Boundless Cybersecurity for the hyper-distributed era and a work reality where everyone is remote, mobile and unsecure. By knowing the unknown, providing real-time visibility and enabling breakthrough economics, SonicWall closes the cybersecurity business gap for enterprises, governments and SMBs worldwide. For more information, visit [www.sonicwall.com](http://www.sonicwall.com).



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Refer to our website for additional information.

[www.sonicwall.com](http://www.sonicwall.com)

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