

Software Partner Program

Guide to opportunities, benefits and requirements



Welcome

We appreciate the skills and expertise you bring to our business.

As technology evolves to keep pace with the complex world of commerce, Pitney Bowes continues to innovate. Every day we're helping our partners identify opportunities and address new challenges across a broad range of industries.

Our Software Partner program was recently recognized as one of the best programs in the industry by CRN. The reason is simple: We provide the value-added support you need to succeed. You'll find leading-edge technologies. An experienced team of professionals. Insights on trends and strategies. Plus, the tools and services you need to grow and thrive. We offer market development funds to support your sales efforts, as well as the comprehensive training and marketing tools that are critical for success.

Almost every organization is looking to accelerate their digital transformation. They need better ways to identify customers, locate with precision and communicate more effectively. We want to ensure that you have what you need to capitalize on this growing demand.

Welcome to the Pitney Bowes Software Partner Program.



Shannon McWilliams
Senior Vice President
Software Channels



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Program overview:
Built for long-term success

We thrive on helping our partners move business forward.

Pitney Bowes Software Partners benefit from our unwavering commitment to research and development across a broad range of high-growth markets. We enable businesses to identify, locate and communicate with customers. Our solutions span high-performance analytics, data visualization and exploration, data management, customer intelligence, security intelligence, fraud detection and prevention, and risk management.

Our active engagement with emerging open-source platforms such as Hadoop[®], combined with ongoing investment in cloud computing, keep us at the forefront of technology. Most recently, we launched the Pitney Bowes Commerce Cloud, paving the way for our partners to deliver best-of-class solutions to their clients.

Leading-edge technology is only the start. With Pitney Bowes, you'll find a partner who understands the unique value you bring, and what you need to grow your business. As a Pitney Bowes Software Partner, you'll gain:

- **Collaborative sales engagement:** Ongoing, strategic guidance to identify key areas of opportunity, as well as the ability to specialize in relevant Pitney Bowes software.
- **Comprehensive training and support:** Sales kits, e-learning tools, technology exchanges, video tutorials and our 24/7 online technical support.
- **Market development funds:** These funds can be requested for lead generation and partner enablement activities, providing you more ways to market and grow your business.
- **Comprehensive insight:** In business, getting it right matters. Our competitive insights help transform how our partners support their customers, big and small.
- **Diverse solutions:** Physical, digital, perpetual, subscription, SaaS or cloud, we deliver client-centric solutions to help businesses make the most out of every transaction and interaction, accurately and securely.
- **Worldwide reach:** Our global presence spans across several continents and is more than 16,000 employees strong.



Go-to-market models:

Designed to showcase your value

The Pitney Bowes Software Partner Program is a value-based program that encourages you to differentiate yourself by demonstrating your capabilities in Pitney Bowes technologies and solutions.

Our comprehensive certification program provides partners with the competencies and specializations they need to succeed. Your customers and prospects will have confidence in your skills and your ability to solve complex business problems.

The partner program framework enables, rewards and supports you based on your go-to-market engagement model and your investment with Pitney Bowes.

System Integrator (SI) — The System Integrator Partnership is open to partners that can demonstrate their ability to deliver Pitney Bowes solutions and integration services across a broad range of industries.

System Integrators are strategic to the growth of our business. They provide services in consulting, business process re-engineering, change management, resource planning, solution development, IT integration and user training services. System Integrators support global regions or territories. They also influence deals, bringing Pitney Bowes into accounts with consultative support throughout the entire lifecycle of the client's relationship. System Integrators can create earning opportunity by engaging with Pitney Bowes, reselling and influencing joint solutions across a broad range of industries.

Channel Partner — Channel Partners help meet the market demand for Pitney Bowes software in specific industries and customer segments. Channel Partners can derive incremental revenue and profit by providing their own consulting and integration services in addition to software licensing. The program offers these partners a variety of ways to develop and grow their business. Our Channel Partners have been recognized for leading the way in market knowledge, vision, integrity and customer satisfaction.

Partner Program Benefits

The following resources and benefits are available to all partners that align to the policies in the Pitney Bowes Software Partner Program.

| Sales materials | |
|--|--|
| Access to sales tools | Pitney Bowes offers a complete set of sales tools, including presentations, collateral, etc. |
| Communications and marketing | |
| Partner communications | Pitney Bowes communicates regularly with you about news, products, solutions, resources and program changes through various communications channels, including newsletters, executive updates, webcasts, etc. |
| Market Development Funds (MDF) | Pitney Bowes offers you initiative-based MDF that can be requested for lead generation and enablement activities. MDF guidelines can be found in the MDF section of this guide. |
| Partner logo | You can promote your Pitney Bowes partnership on your website. Brand guidelines can be found in the marketing section of this guide on page 11. |
| Syndicated content | Pitney Bowes syndicated content is available and allows you to quickly and seamlessly host Pitney Bowes content within your own website. For information, please contact your Partner Manager to schedule a marketing review. |
| Partner Locator | Build visibility with customers through your listing on the Pitney Bowes Partner Locator. The Locator features an alphabetical listing of Pitney Bowes partners as well as search capabilities for identifying you by location. The information displayed in this Locator is populated with information provided by you in your Partner Profile. |
| Partner Advisory Council | A select number of partners will be invited to participate on the Partner Advisory Council. |
| Opportunity for editorial content in Pitney Bowes communications | Pitney Bowes may periodically showcase the progress and achievements of you and your customers. Opportunities will be promoted through communication vehicles as appropriate. |
| Enhanced marketing opportunities | A select group of partners will have access to a unique set of enhanced marketing opportunities such as funded third-party research projects, executive speaking opportunities, point of view papers, video-based success stories and joint success stories. Enhanced marketing support will be administered between the partner and the Pitney Bowes Partner Marketing Team. Partners invited to participate in the enhanced marketing opportunities are selected by level of investment in Pitney Bowes solutions. |

Partner Program Benefits continued

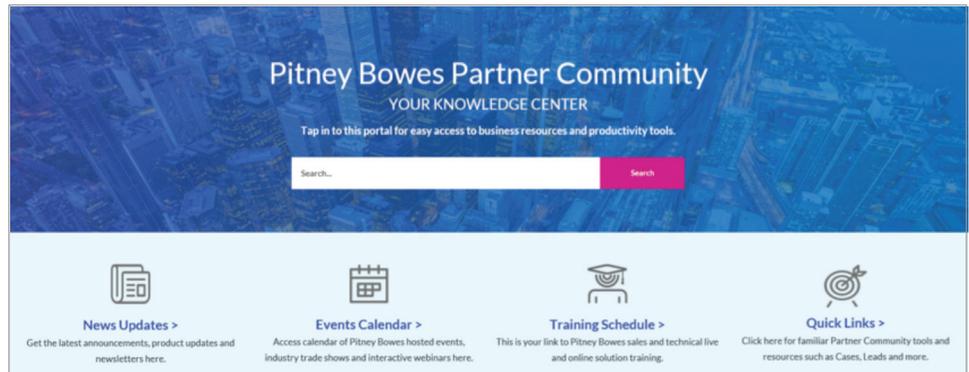
| Training and Credentials | |
|--|---|
| Complimentary e-learning and knowledge-based library | Pitney Bowes offers self-paced e-learning that's accessible anywhere, anytime at no cost. Contact your Partner Manager to gain access to the knowledge-based library. |
| Complimentary certification testing classes | In order to provide easier access to certifications, Pitney Bowes Partner Enablement will hold complimentary, regionally-based, certification testing days for forthcoming certification programs. A description of these certification programs and testing classes will be announced through our partner newsletter and added to this program guide when available. |
| On-site/custom classes | Please contact your Partner Manager to schedule an on-site or custom training class. Fees may apply. |
| Initiative-based MDF for training | Please contact your Partner Manager to schedule an on-site or custom training class. Fees may apply. |
| Technical assets | |
| Not For Resale, evaluation and trial licenses of Pitney Bowes Software | Pitney Bowes provides NFR software product to partners as a tool to assist with testing and education. Please refer to the NFR section of this guide for more details. |
| Access to Pitney Bowes technical support | As a partner you have access to real-time support through phone, email or online access. |
| Implementation framework and scoping guidelines | <p>Our professional services team can provide detailed guidelines on typical basic, average and complex implementations including statement of work by solution or product set.</p> <p>We can provide best practices around:</p> <ul style="list-style-type: none"> • Software implementation • Health checks • Data migration • Configuration • Integration • Managed services • Training |

Partner Community

Partner Community is the place for our Partners to easily access valuable sales, marketing, technical resources and productivity tools for software solutions including:

- Asset Central—Product and solution content organized by technology like data sheets, competitive battle cards, product launch schedules and go-to-market kits and more.
- Training Schedules—A calendar of global enablement including live and online training.
- News—News updates and trending topics.
- Event Calendar—Upcoming events like trade shows, conferences and thought leadership webinars.
- MDF—Partners can submit initiative-based market development funds that enhance their sales and marketing strategies.

Register for portal access [here](#). This simple form will kick-start the SSO process. Please add globalenablement@pb.com to your contacts so that future Pitney Bowes training emails can be delivered to you.



Market Development Funds (MDF)

Overview

Pitney Bowes is pleased to provide you with the opportunity to receive initiative-based market development funds that enhance your sales and marketing strategies. These funds ultimately support development of revenue opportunities to secure new business.

MDF is available to all partners with an approved partner development plan, dedicated sales rep and pre-sales technical proficiency.



MDF at a glance

Pitney Bowes investment: You have the ability to request initiative-based MDF. Investment is based on the partners' commitment to the program, strength of the activity and dollars available.

Fund requests: You can access MDF through the Pitney Bowes Partner Community. Select Marketing Tools, Market Development Funds and then "Create MDF Request". All partners requesting MDF must have a partner development plan in place prior to submitting an MDF request.

Eligible activities: Funds are available for demand generation activities only where a Return on Investment (ROI) can be measured including (but not limited to):

- Face-to-face events (must include Pitney Bowes content)
- Conference and event sponsorships (must include Pitney Bowes content)
- Sales kickoffs (must include joint account planning)
- Telemarketing
- Other demand generating activities (we are open to ideas)

Branding approval: All materials that include Pitney Bowes branding must adhere to Pitney Bowes branding guidelines. (Please see the Brand Guidelines section on page 12).

MDF Process

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| Requesting MDF | You must fill out the Pitney Bowes MDF request form at least six weeks before the activity commences. The form requires a description of the event, time frame, amount of money requested, ROI, etc. Requests must align with Pitney Bowes targeted account development plans and partners' competencies and specializations. |
| Branding approval | Co-branded collateral should adhere to Pitney Bowes branding guidelines. Pitney Bowes may conduct random audits as needed. Reimbursement may be forfeited if guidelines are not followed. |
| Time constraints | Activities must be conducted within the time frame identified in the Pitney Bowes MDF request form. |
| Submitting an MDF claim form | <ul style="list-style-type: none"> • Claims must be made within 30 days of completion of the activity. Request the Pitney Bowes MDF claim form through your Partner Manager. • Required Proof of Purchase (PoP) must be submitted with your claim. See eligible expenses. • Receipts must be submitted with your claim. The refund is based on total amount of receipts and approved funding amount. • Leads must be submitted with your claim. A lead spreadsheet will be provided and all columns must be completed for reimbursement. |
| Receiving your payment | Pitney Bowes will reimburse you through an electronic transfer within 45 days of claim approval, or you can request a credit on your account. |

MDF: Eligible activities (ROI must be measured)

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| Channel partner events | PoP = Receipts, invite, copy of presentation + complete lead spreadsheet |
| Trade show sponsorships | PoP = Receipts, sponsorship form, copy of presentation + complete lead spreadsheet |
| Local industry events | PoP = Receipts, sponsorship form, copy of presentation + complete lead spreadsheet |
| User group meetings (including complementary software solution lines) | PoP = Receipts, invite, copy of presentation + complete lead spreadsheet |
| Telemarketing (specific to Pitney Bowes software solutions) | PoP = Receipts, script + complete lead spreadsheet |
| Partner sales kickoffs (with Pitney Bowes content and joint account planning) | PoP = Receipts, invite + complete lead spreadsheet (joint accounts) |

MDF: Ineligible activities

Charitable donations

Political activities and contributions

Pitney Bowes sponsored events

Travel costs to attend customer events, meetings or training

Infrastructure and internal operating expenses, including web hosting earning opportunity, creating websites, graphics software or other software (exception is syndicated support described above)

Shipping and labor costs

Third-party pre-sales system planning, assessment and related services (may reconsider for marketing bureaus)

Crediting of incentives to an end-user customer (direct credit or indirect through price reductions)



Pitney Bowes Marketing Brand Guidelines

The following provides basic guidelines for the use of the Pitney Bowes and Pitney Bowes Business Partner logo, and Pitney Bowes brand elements by our approved partners.

1. Use of the Pitney Bowes Logo:

The Pitney Bowes logo can be used by our approved partners when Pitney Bowes is being referenced in context. Specifically, the logo can be used on a partner's website when referencing all partners they do business with OR when discussing the portfolio of offerings they sell which include Pitney Bowes products. Prior approval is required by Pitney Bowes if partners wish to include the Pitney Bowes brand within their communications.

2. Description of Pitney Bowes for Partner Websites:

For partners wishing to provide a description of Pitney Bowes on their website, the following are the approved descriptions:

90 Words

Pitney Bowes is a global technology company powering billions of transactions – physical and digital – in the connected and borderless world of commerce. Clients around the world, including 90 percent of the Fortune 500, rely on products, solutions and services from Pitney Bowes in the areas of customer information management, location intelligence, customer engagement, shipping, mailing, and global ecommerce. And with the innovative Pitney Bowes Commerce Cloud, clients can access the broad range of Pitney Bowes solutions, analytics, and APIs to drive commerce. For additional information visit Pitney Bowes, the Craftsmen of Commerce, at pb.com.

60 Words

Pitney Bowes is a global technology company powering billions of transactions in the connected and borderless world of commerce. Clients around the world rely on products from Pitney Bowes in the areas of customer information management, location intelligence and customer engagement. And with the Pitney Bowes Commerce Cloud, clients can access a range of solutions and APIs to drive commerce.

33 Words

Pitney Bowes is a global technology company powering billions of digital transactions for commerce. The Company's products and solutions enable its customers to Communicate, Identify and Locate new business opportunities around the world.

Statement for PB Certified Partner

Pitney Bowes professional certifications validate its business partners' knowledge, skill and expertise in implementing Pitney Bowes solutions.

Additional Co-Marketing Guidelines can be found online [here](#).

Partner Program Requirements

Membership period

The membership period runs one (1) year from date of the executed partner agreement. Pitney Bowes reserves the right to evaluate your membership status at any time.

Contract renewal

Program membership is subject to an annual review one (1) year from date of the executed partner agreement.

Engagement and relationship

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| Initiation fees | There is no initial fee to join the Partner Program. |
| Application process | Prospective partners are invited to submit an application to become approved as a Pitney Bowes Partner Program. The application will be provided by the Pitney Bowes Partner Manager. <i>Note: To maintain effective compliance with the Foreign Corrupt Practices Act, in some cases, applicants to the Pitney Bowes Partner Program may need to complete additional documentation, allowing Pitney Bowes to further assess participation.</i> |
| Partner Program agreement | Terms governing the management of the relationship, software usage and earning opportunity, marketing activities, publicity and logo use, as well as other pertinent aspects of the Pitney Bowes and partner arrangement, are found in the Partner Program Agreement. Pitney Bowes reserves the right to change the program. |
| Partner profile | Your partner profile is used to help support and drive opportunity. The profile consists of information about your business, your areas of expertise and the markets you serve. The profile information is used to populate your company overview on the Partner Locator at pb.com. |
| Pitney Bowes partner satisfaction survey | As a best practice we will ask your company to complete our partner survey so that we can improve our process in working together. |
| Joint business planning/QBRs | All partners are asked to collaborate with Pitney Bowes to create a partner development plan that includes revenue goals, marketing initiatives and enablement activities. The plan will be reviewed regularly and may also include regional plans. |
| Forecasting | Partners will be asked to participate in regularly scheduled calls with Pitney Bowes channel management to discuss opportunity status. The calls are intended to offer assistance in the progression of opportunities. Partners will demonstrate best efforts to participate in and provide a current and accurate status with associated revenue of open opportunities. |
| Reporting requirements | From time to time, Pitney Bowes may request transactional reports which may include, but not be limited to, end user name and address, purchase order date, reseller invoice number, quantity sold and product description. |
| Renewals | Partners will not receive margin for renewals of Pitney Bowes software license or maintenance products on contracts for which they are not the party of record. Party of record refers to the billing entity for the preceding contract. Exceptions may be granted at the discretion of a Software VP. Exceptions must be reviewed and approved by Pitney Bowes prior to the partner providing pricing to the end client. Partners accepting a PO from an end client and requesting fulfillment from Pitney Bowes without prior approval will be invoiced full list price. |

Partner Program Requirements continued

| Engagement and relationship (continued) | |
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| Firm Order Policy | <p>Pitney Bowes requires all partners to have a committed end client purchase order in hand before submitting a purchase order to Pitney Bowes on their client's behalf. The partner will remain responsible for any order placed with Pitney Bowes regardless of any cancellation of the order by partner's client, and no returns or refunds will be issued to partner based on cancellation or withdrawal of an order by the client. Pitney Bowes reserves the right to require a copy of the end client purchase order, with pricing redacted, before fulfilling the partner order.</p> |
| Record Keeping and Audits: | <p>Pitney Bowes expects our partners to maintain accurate business records of all transactions involving our products and services. Partners are prohibited from engaging in any activity that would misrepresent transaction information to us or your end clients. As a matter of standard practice, Pitney Bowes may routinely audit our partners. Records must be retained and made available within a reasonable amount of time to Pitney Bowes or our independent auditor for 3 years following sale date.</p> <p>Documentation required:</p> <ul style="list-style-type: none"> • Partner invoice to end client that clearly identifies: <ul style="list-style-type: none"> – Date of Sale – Quantity sold – End Client Price – End Client Install Address – Service/License Start and End Period • End client purchase order to Partner • End client contact name and contact information <p>Partners understand that Pitney Bowes may at its discretion contact the end client to discuss a purchase and their overall satisfaction with the process and product.</p> <p>In addition, Pitney Bowes or its third party auditor may review partner's use of the NFR Copies provided to Partner under the NFR Copy policy, including a review of all locations where the NFR Copies are installed or used.</p> <p>If as a result of a Pitney Bowes or an independent auditor review of the documentation, it is determined that the partner has failed to comply with the obligations agreed upon within their executed Software Partner Agreement or the Partner Program Guide, the partner agrees to refund to Pitney Bowes any margin or fees collected for the transaction(s) in question, or in the case of NFR Copies, pay Pitney Bowes the then-current list price of the Pitney Bowes products used outside the scope of the NFR Copy policy. If during the audit review, a material breach is revealed, Pitney Bowes may elect to de-authorize the partner.</p> |
| Executive contact | Partners must name an executive contact to discuss partnership status and partner development plan with their Pitney Bowes counterpart on a regular basis. |
| Key contact | You are responsible for identifying an administrator dedicated to the Pitney Bowes program to handle activities such as receiving the Pitney Bowes software renewal keys as well as software orders. |

Software Support and Maintenance Offering

Pitney Bowes Software Support and Maintenance provides comprehensive coverage for software license agreements, product upgrades and technical support under a single, common set of agreements, processes and tools. To ensure clients have access to the latest version of the software and to remote technical support, Pitney Bowes Software Support and Maintenance must be sold with the license acquisition of all Pitney Bowes Software products, and is generally renewable on an annual basis.

The terms of Maintenance Services will be provided pursuant to client's License Agreement but in general, Pitney Bowes Software Support and Maintenance services consist of:

- A reasonable amount of telephone support to assist you in the use of Pitney Bowes software products
- Product enhancements, issued as available during the current maintenance term
- Data updates, if you have licensed data with a subscription
- Correction of technical errors or non-conformities with the use of Pitney Bowes software products
- Optional 24/7 emergency support
- Customized support. For details, contact your Pitney Bowes Channel Manager.

Maintenance will be part of all Pitney Bowes Software agreements and entitles clients to the following services.

| Service | Standard Level 1 Basic | Standard Level 2 Mission Critical |
|---|------------------------|-----------------------------------|
| Access phone, email and online case management during local business hours | X | X |
| Unlimited access to Pitney Bowes online knowledge base | X | X |
| Enable use of remote access tools (at discretion of Worldwide Software Support team) | X | X |
| Sign in to your account on the Pitney Bowes website: pitneybowes.com/software-support | X | X |
| Receive free version upgrades and patches | X | X |
| Receive 24/7 critical production emergency support (see page 13 for definition) *Excluding shrink-wrap products *Available only in English language | | X |
| Access priority telephone queue (US only) | | X |

For sales that are partner-originated, partners are required to provide first level support to the end user for the initial year and for any subsequent years that the client renews their maintenance via the Partner. First level support includes, but is not limited to, the offering of phone or online assistance with the intent to resolve basic customer issues.

The Pitney Bowes Software and Support Maintenance policies are aligned with our Standard Support Agreement. Details can be found by visiting the following: pbinsight.com/resources/get/9898

Pricing for Software Support and Maintenance Offerings will be provided to you by your Channel Manager.



Professional Services

Whatever your business challenge, mitigating risk and delivering business value are the keys to a successful solution. Pitney Bowes Professional Services help organizations cost-effectively plan, build and deploy secure, high performance solutions. With accuracy and precision across the life-cycle, we ensure that your investments deliver the greatest value in the shortest possible time.

| Service Offerings | |
|---|---|
| Implementation services | With specialized project governance and methodologies, we enable cost-efficient solutions implementation into even the most complex IT infrastructures. |
| Application support | Keep clients' systems running at peak performance with strict SLAs and rapid response times. We provide the expertise necessary to support any level of customization and integration. |
| Enhancement and upgrade services | Our experts can extend the life and value of systems by monitoring efficiency and performance, assisting with upgrades, and identifying potential improvements. |
| Data services / Predictive analytics | Engage our analytics team to develop effective and reliable customer and network planning solutions tailored to each client's business. Our expertise in applied analytics help you visualize your customer's business and customer data, develop effective strategies and predict the outcomes of their decisions. |
| Managed services | On-premise, off-premise or hosted, we can assume full management of a client's systems, delivering high availability and performance, adherence to regulations and streamlined implementation of upgrades. |
| Advisory services | Our technical consultants will provide expert advice on system architecture and integrations, helping to optimize infrastructure, high availability, data integrity, performance and disaster recovery. |
| Business consulting | Our experts can extend the life and value of systems by monitoring efficiency and performance, assisting with upgrades, and identifying potential improvements. |
| Solution add-ons | Opt for full customization, or choose from a library of solution templates and applications to get your implementation to market faster. |



Teaming and Referral

Partners are granted rights to resell Pitney Bowes products as outlined in their individual Software Partner Agreement. Partners that uncover opportunities for products that they are ineligible for resale may elect to engage in a process called teaming or referral.

If the Team/Co-Sell Go-to-Market Approach is selected, the opportunity will be governed by specific terms: [View terms](#).

If the Referral Go-To-Market Approach is selected, the opportunity will be governed by a different set of terms: [View terms](#).

A form and assistance with this process will be provided to you by your Channel Manager.

NFR Copies and Utilization Policy

| | |
|---|---|
| <p>Pursuant your agreement, PBSI provides NFR Copies as a tool for use by Partners</p> | <p>Generating sales of the Licensed Products</p> <p>For activities such as evaluation and proof of concepts that support the sales to End Users</p> <p>For internal training purposes. Partners are not permitted to use NFR Copies for any other purpose, including those set forth in "Restricted Uses", below. Partners with questions on NFR usage should contact their Partner Account Manager or the Pitney Bowes Contracts Department.</p> |
| <p>Demonstration</p> | <p>Partners may use NFR Copies to demonstrate PBSI's technology to Prospective End Users. NFR Copies may not be left with the Prospective End User for evaluation purposes. A Prospective End User who wishes to evaluate Licensed Products should execute an Evaluation License.</p> |
| <p>Application development/support</p> | <p>Application development is the development of a Partner solution which includes or functions with Licensed Products, and sales of which result in the license of Licensed Products. This does not include custom development for specific customers – see below Restricted Uses. Partner may also use NFR Copies to provide First Level Support for Partner solutions, so long as the NFR Copies are not provided to any third parties.</p> |

NFR Restricted Uses

NFR Copies cannot be used in the following manner unless otherwise agreed to by PBSI in writing, or as set forth in your Agreement:

In the performance of any custom development or professional services work performed by Partner

Provided to any third party, including End Users or Prospective End Users

Used to provide training to End Users (except a limited number of copies can be used to provide training for the Partner solution, so long as the training is not standard training for the Licensed Products (similar to what is provided by PBSI), and the installation and use of such copies is limited to the duration of the training only)

Used in commercial or revenue generating activities of Partner or any third party, including application service provider, service bureau, or similar activities or unless MSP PBSI agreement has been executed

Deal Registration and Joint Sales Engagement

All opportunities must be registered by completing the opportunity registration form via the online portal. Manual registration is required when the online portal is not available. The opportunities will be reviewed by Pitney Bowes partner operations in the respective region. Reviews will be completed within three business days upon receipt of registration. The opportunity to resell and influence within a joint sales engagement are available through approved opportunity registrations.

All MapInfo Pro™ Desktop Products

The MapInfo Pro desktop products do not currently require deal registration.

United States

3001 Summer Street
Stamford, CT 06926-0700
800 327 8627
pbsoftware.sales@pb.com

Canada

26 Wellington Street East
Suite 500
Toronto, ON M5E 1S2
800 268 3282
pbsoftware.canada.sales@pb.com

Latin America

Av. Engenheiro Luis Carlos Berrini 1681 - 9º andar
Brooklin São Paulo SP 04571-011
Brazil
+55 11 2348 8860
Fax: +55 11 2348 8861
pbsoftware.latinamerica@pb.com
www.pbinsight.com.br

United Kingdom

The Smith Centre
The Fairmile
Henley on Thames
Oxon
RG9 6AB
UK
0800 840 0001
pbsoftware.emea@pb.com

Australia

Level 1, 68 Waterloo Road
Macquarie Park NSW 2113
+61 2 9475 3500
pb.apac@pb.com

Singapore

Pitney Bowes Software Pty Ltd
10 Hoe Chiang Road #16-02 Keppel Towers
Singapore 089315
+65.6595.0288
Fax: +65.6222.6900
pbsoftware.singapore@pb.com

For more information
visit online: pitneybowes.com