

Doing Business With IBM

A guide for The Now Factory customers in North America



Welcome to IBM!

On October 29, 2013, IBM announced completion of its acquisition of The Now Factory. This was and is an extremely positive development for our customers, our staff and the company itself. Since October, while the business has concentrated on serving our customers and building out our products and solutions, a parallel team has been preparing for full integration into IBM, which will take place on July 1, 2014.

Beginning July 1, 2014, The Now Factory will be conducting business as IBM.

The following “Doing Business with IBM” guide describes changes to expect and actions needed to optimize the benefits of your relationship with IBM. It will also help to ensure a smooth transition to IBM’s business systems and processes.

As a customer of IBM, you will continue to have access to The Now Factory offerings, now under the IBM brand, as well as the extensive IBM portfolio of software solutions and services offerings, while enjoying the high-quality, responsive service you have come to expect from both The Now Factory and IBM.

We anticipate that you and your organization will experience a smooth transition to IBM over the next several months. During this process, the IBM team and your IBM Now Factory representatives are available to answer any questions and to address your ongoing software needs.

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Please watch for a letter from IBM containing important information and key actions including:

- Your IBM Customer Number
- Your Software Site Number
- Software subscription and support

1. Important Highlights

Starting in late July 2014, The Now Factory Customer Numbers will be replaced with IBM Customer Numbers (ICNs). **Your ICN, along with your Software Site Number (if applicable), can be found in the Welcome to IBM letter sent to your company's primary business contact of record.** Alternately, you may contact [eCustomer care \(https://www-112.ibm.com/software/howtobuy/passportadvantage/paocustomer/docs/en_US/ecare.html\)](https://www-112.ibm.com/software/howtobuy/passportadvantage/paocustomer/docs/en_US/ecare.html) to obtain this information.

All purchase documentation, such as invoices, will be sent to the Primary Contact listed in your IBM profile associated with your ICN unless specified otherwise in your order. If you identified a unique “Bill To” contact and address during the customer information verification process, future invoices will be sent to that contact/address combination. Please reference the “Table of changes for Accounts Payable and Purchasing” in this document for additional information about billing changes.

The Now Factory Support will continue to be accessed through existing channels until September 2014. Continue to use your The Now Factory Customer Number for access. Further details can be found in the “Support” section of this document.

2. Important actions for The Now Factory customers

Create an IBM profile

Your company's Primary Contact will need to create an IBM profile

With an IBM profile, you can view, update or add personal contact details, job title or registration settings.

Create or update your IBM profile here: <https://www.ibm.com/account/profile/us>

Create an IBM Registration

Your company's Primary Contact will need to create an IBM Registration

Your IBM Registration ID, also known as an IBM ID, is your single point of access to IBM web applications that use IBM Registration.

You need just one IBM ID and one password to access any IBM Registration based application.

Create or update your IBM Registration here: <https://www.ibm.com/account/profile/us?page=reg>

Please note there may be a delay of up to 15 minutes before you will be able to use your new IBM ID.

Need assistance?

For additional information and guidance on setting up your IBM profile and IBM Registration ID, consult our FAQ page here: <https://www.ibm.com/account/profile/us?page=faqhelp>

Alternatively, you may contact the Worldwide IBM Registration Helpdesk at the following link: <https://www.ibm.com/account/profile/us?page=helpdesk>

3. Accounts Payable and Purchasing

Effective July 1, 2014, The Now Factory accounts payable and purchasing processes will migrate to IBM processes. You will use a common process to acquire software products and services from IBM.

Any outstanding The Now Factory quotes expire on June 30, 2014. After this date, quotes will be reissued on IBM paper and be subject to IBM's terms and conditions.

Important changes in Accounts Payable and Purchasing

Please check the following items on your internal vendor records:

Tax ID Exemption Certificates and Change Requirements

Vendor applicable Tax Identification Number will change.

If you are currently exempt from Sales and Use tax, or local VAT, you will need to issue your company's Tax Exemption Certificates to IBM with your first order after July 1, 2014. IBM's tax forms can be found here: <http://www-03.ibm.com/procurement/proweb.nsf/contentdocsbytitle/United+States~Tax+forms>.

* **Blank tax forms are available on applicable State websites.**

Vendor name

Vendor name will change from The Now Factory to the applicable local/regional IBM operation covering your location (the term "Vendor" below represents the applicable IBM entity).

Vendor remit-to addresses

Vendor remit-to addresses for checks, wire transfers and overnight payments will change for all new business after July 1, 2014.

The new details will appear on your invoices issued from IBM after that date.

Important note: Invoices issued from The Now Factory that are paid after July 1, 2014 should still be made payable to The Now Factory, an IBM Company, and remitted per the instructions on the The Now Factory invoice.

Vendor standard payment terms

In most countries, Vendor standard payment terms of “due upon receipt” may be applicable. You can find this information on either your invoice or quote.

Important note: Invoices issued from The Now Factory that are paid after July 1, 2014 should follow the payment terms as noted on the The Now Factory invoice.

Currency

In some countries, the currencies used by The Now Factory are different than those used by IBM, thus you may be transacting in a different currency with IBM.

Languages

In some countries, the correspondence you will receive from IBM may be in the local language.

Customer numbers

Effective July 15, 2014, The Now Factory customers will be assigned an IBM Customer Number. In the weeks following July 15th, you will receive your ICN in a welcome letter from IBM. Please note that your ICN will be used with all order-related communications.

Purchase documentation

All purchase documentation, such as invoices, will be sent to the contact(s) listed in the IBM profile associated with your ICN unless specified otherwise in your order.

Part numbers and product descriptions

New part numbers and product descriptions for the IBM Now Factory portfolio will replace the pre-existing The Now Factory product descriptions.

These new part numbers and descriptions will appear on quotes and invoices you may receive from IBM.

Document formats

The format of documents (quotes, services statements of work, invoices, etc.) you receive will change in format after July 1, 2014, and they will be issued from an IBM location as appropriate. This may affect the remit-to address, and in certain countries, the transaction currency that you are using today.

PO requirements

If your company requires issuing a purchase order (PO) to facilitate payment for goods or services, IBM may require a new PO. Contact your IBM Now Factory representative with any questions.

New licensing process

IBM Now Factory offerings are governed by license agreements which can be found here: <http://www-03.ibm.com/software/sla/sladb.nsf/search/>. **Note:** *your legacy contract continues to apply to your existing software until such time as you move to the IBM license agreement.*

Migration to new pricing metrics

Coming into IBM, your active product entitlements will be moved to IBM systems. At that time, your sales representative will be available to assist you.

Tax liability

Beginning July 1, 2014, all order transactions will include applicable sales tax (unless you have a tax exempt certificate on file with IBM). Taxes will be included in your invoice.

4. Software Support

The Now Factory Support offerings will be transitioned to IBM support in October 2014 and supported by the IBM Now Factory Support team. The IBM Now Factory Support team will continue to focus on delivering customer satisfaction without compromise.

As we work to integrate The Now Factory and IBM Support, we will offer IBM Now Factory customers expanded capabilities through the existing IBM Support infrastructure. For the most current information and latest updates on the IBM Now Factory Technical Support transition, visit <http://bit.ly/TNFSupport>. This site is also an excellent source of information for those new to IBM Support.

To receive support for The Now Factory products, a client must have a Subscription and Support maintenance agreement for The Now Factory products with IBM or have an existing active The Now Factory maintenance contract.

IBM anticipates that the full support transition will be completed in October 2014.

What does not change until October 2014

Support is provided per your existing The Now Factory Support agreements. Contact support at <https://jira.thenowfactory.com>.

As part of the transition into IBM Support, IBM The Now Factory will be contacting you to validate the correct Primary and Site Technical Contacts and provide additional information about your transition to IBM support systems.

For Flexible Contract Type (FCT):

Both hardware and software support is provided per your existing The Now Factory Support agreements. Contact support at <https://jira.thenowfactory.com>.

If the The Now Factory Support Portal is unavailable, customers may directly call The Now Factory support line at +353-1-5143804 for assistance.

What does change between July 1 and October 2014

For Passport Advantage (PA):

Both hardware and software support is provided per your Passport Advantage contract. Contact IBM support at <https://www.ibm.com/support/servicerequest>.

What does change after October 2014

For Flexible contract type (FCT) and Passport Advantage (PA):

Both hardware and software support is provided per your existing The Now Factory support agreements and Passport Advantage contract. Contact IBM support at: <https://www.ibm.com/support/servicerequest>.

Below are informational highlights to help you understand the definition of those future roles in IBM Customer Support.

Primary Contact

The **Primary Contact** will be considered as the contact for notice of all changes to agreements or other contractual issues for software and hardware. The Primary Contact will be responsible for informing IBM of all necessary changes to the customer account.

In addition, the Primary Contact will manage access to the IBM Download Site for their organization's IBM Now Factory software contract(s). The Primary Contact approves IBM Download Site access requests from their organization and will receive all download account management and communications. This person will also be the primary contact for annual support renewal invoices for IBM Now Factory software at your organization. Note: If a Primary Contact is not designated, the Site Technical Contact will be used for both roles.

Only a **single** Primary Contact can be designated per company in the IBM systems.

Site Technical Contact

The **Site Technical Contact** is a specific individual from the customer's company who will manage access to IBM's Technical Support services and grant the authority to open Technical Support Requests on behalf of their organization. The Site Technical Contact approves IBM Support access requests from their organization's employees and business partners and will receive all IBM Support access instructions and communications. More information regarding IBM Electronic Support can be found at <http://www-01.ibm.com/support/electronicssupport/workwithibm.html>.

Only a **single** Site Technical Contact can be designated per company in the IBM systems. Additional Named Callers can be added to the system by the Site Technical Contact.

5. Appliance Maintenance & Software Subscription and Support Renewals

The Now Factory Support Renewals will be integrated into the IBM Maintenance & Subscription and Support Renewals process in a phased approach. Your Maintenance & Subscription and Support Renewal is determined by the date your current The Now Factory Support contract expires. The Now Factory's Maintenance and Support Renewals will be known as IBM Subscription and Support (S&S) after July 1, 2014.

Renewal dates and actions

Renewal date before July 1, 2014

You should have received an email from your The Now Factory Renewal representative and you should have proceeded with confirming your renewal by your current renewal date or June 30, 2014, whichever is earlier, to help ensure that there are no disruptions in service. Any renewals not confirmed by that date will be re-quoted under IBM's terms and conditions. If you have not yet received a notification, please contact your The Now Factory Renewal representative.

Renewal dates between July 1, 2014 and August 31, 2014

If your renewal falls within these dates, you should have received an email from your The Now Factory Renewal representative with an opportunity to renew early. If you elect not to take advantage of this opportunity by June 30, 2014, you will be quoted through IBM processes in the geography in which you are located. Any orders received after that date will need to be addressed to IBM and will be subject to IBM's terms and conditions.

Invoicing, part numbers and payment terms will change to IBM standard conditions and the renewal end date will move out to the last day of the month. If you have not yet received a notification, please contact your The Now Factory Renewal representative.

Renewal date after July 1, 2014

Your Maintenance & Subscription and Support Renewal quote will be generated from IBM systems and provided to you by your IBM Subscription and Support Renewal representative. This quote will be subject to standard IBM terms and conditions, and the renewal end date will move out to the last day of the month.

In the future, Maintenance & Subscription and Support Renewals may transition to IBM's Passport Advantage program. At that time, you will receive a notice to renew your The Now Factory Maintenance & Subscription and Support Renewal for your IBM Now Factory products through IBM's Passport Advantage program. Notices will be generated from IBM systems and provided to you by your IBM Inside Sales Renewals representative.

6. Passport Advantage

IBM offers two license acquisition and Software Subscription and Support offerings — Passport Advantage (<http://www-01.ibm.com/software/lotus/passportadvantage/aboutpassport.html>) and Passport Advantage Express (<http://www-01.ibm.com/software/lotus/passportadvantage/aboutexpress.html>). Passport Advantage is designed for larger enterprises, while Passport Advantage Express is designed to meet the needs of medium-sized businesses.

Passport Advantage

Passport Advantage is IBM's program for software license acquisition, Software Subscription and Support, IBM Appliances and IBM SaaS subscriptions. It is designed for larger enterprises that may have multiple sites. Passport Advantage gives you more opportunities to obtain better pricing for your volume purchases over time and is based on your Relationship Suggested Volume Price (RSVP) level.

Passport Advantage Express

Passport Advantage Express is designed for single-site, smaller enterprise businesses. It combines the full Passport Advantage product list with the simplicity of transaction-based acquisition. Passport Advantage Express does not require a relationship agreement— each transaction is subject to the terms and conditions effective at the time. There are no points and no aggregating— just a single price level. And with each new license acquisition, you get renewable Software Subscription and Support.

After July 1, 2014, IBM Now Factory products and support will be available under both Passport Advantage and Passport Advantage Express.

For assistance with Passport Advantage or Passport Advantage Express, reference <http://www.ibm.com/software/passportadvantage/>.

7. Professional Services and Software Education

IBM will now provide The Now Factory Professional Services including configuration, implementation, provisioning, consulting and Education.

IBM Now Factory Professional Services will serve as your client support partner with the same professional staff we have always deployed for The Now Factory offerings. This includes your Account Management and Project Management teams.

Changes in Professional Services as of July 1, 2014

IBM will assume any ongoing The Now Factory Professional Services engagements and statements of work (SOW) and will perform as originally contracted. While there are several process changes regarding the way contracts and SOWs are developed, there are virtually no changes to the overall The Now Factory services business model.

Customers will engage IBM Now Factory services to support the IBM Now Factory portfolio of products. One exception is customers who require a PO between their organization and IBM to facilitate payment for existing The Now Factory services. In that case, the customer must provide their The Now Factory services contact with a new IBM PO with reference to the original contract or SOW.

All new services specific orders not available through Passport Advantage will be contracted using standard IBM services agreements, rate structure and SOWs. The IBM services agreements, SOWs, and service order systems may be a separate system from the IBM software licensing contracts and order systems (e.g., Passport Advantage).

Certain customers may receive more than one invoice for their The Now Factory offering where they previously received a single invoice, i.e., Services on one invoice and Software Subscription and Support Renewal on a different invoice.

**Changes in Software
Education as of July
1, 2014**

IBM Now Factory Education will continue to be delivered as part of The Now Factory Implementation Services. In addition, public classes may be offered through IBM Global Training Providers to increase availability of IBM Now Factory Education worldwide.

Information on all IBM education offerings can be found at: www.ibm.com/training. For additional inquiries, please contact your The Now Factory account rep or training manager.

8. Privacy Policy

As part of the acquisition, personal information may be transferred from The Now Factory to IBM. IBM's privacy policy may be viewed online at <http://www.ibm.com/privacy>.