



## Where to go for Help

Help is available for users participating in SVI.

- Global Partner Portal Online Help. Click **Help** in the application menu in the upper right corner to access Online Help.
- [Global Partner Portal support site](#)
  - Self-study SVI education
  - Quick Reference Cards
  - Simulations
  - Business Partner Administrator Guides
- [PartnerWorld Contact Services](#)
  - Help Desk support is available
- [SVI page in PartnerWorld](#)
  - SVI Overview presentation and Q&A
  - Quick Reference Card
  - Self Study

## Accessing Global Partner Portal

Before you can use Global Partner Portal, you need to receive access to the application by your firm's focal point for Global Partner Portal, called the Authorized Profile Administrator (APA). To request access:

1. Request access to Global Partner Portal from your firm's APA. Include your [IBM ID](#) in the request. The APA grants you access to the application, and determines whether you have the ability to create and edit opportunity records or have view only access.

### Notes:

- New Business Partners must register for Global Partner Portal. Your firm must be in the [PartnerWorld Profiling System](#) (PPS) before it can be enabled for Global Partner Portal. Contact [PartnerWorld Contact Services](#) to begin this process.
  - If you log on to Global Partner Portal and see a blank screen or you don't see the Software Value Incentive view tab, then you are not set up properly in Global Partner Portal for the SVI program. Close the window and contact your firm's APA to have them review your user record. If the APA needs assistance, they should contact [PartnerWorld Contact Services](#) and ask for the Global Partner Portal help desk.
2. After you are granted access, you can log on to Global Partner Portal using the following procedure:
    - a. Access the IBM Registration **Sign in** screen. Your firm's APA will provide you with the Global Partner Portal log on URL.
    - b. Click in the **IBM ID** field.

- c. Type your user ID. The **ID** field is case-sensitive.
  - d. Click in the **Password** field.
  - e. Type your password. The **Password** field is case-sensitive.
  - f. Click **Submit**. The Global Partner Portal home page is displayed.
3. To log off Global Partner Portal, click **Logout** in the upper right hand corner. A message appears to remind you to save your data and close the window.
4. Take the SVI Education. The Global Partner Portal tool contains some navigation interfaces that are different than those you would expect to see in a browser-based application. It is highly recommended that new Global Partner Portal users first review the available SVI educational materials. The [SVI Education](#) site on PartnerWorld includes many useful resources including links to self-running simulations to guide new users in the creation and submission of an SVI opportunity record. New users should click on Help in the upper right corner to access [Online Help](#), especially the sections on Understanding the User Interface.

### Notes:

- Global Partner Portal users with Windows 2000 operating system should use Internet Explorer 5.0.1 5.5 or 6.0; Netscape 7.2; FireFox 1.0.3; or Mozilla 1.7.7.
- Global Partner Portal users with Windows XP operating system should use Internet Explorer 6.0; Netscape 7.2, FireFox 1.0.3, or Mozilla 1.7.7.
- Global Partner Portal requires a separate browser window. Do not use Internet Explorer from within Lotus Notes.
- Global Partner Portal functionality also relies on pop-ups. This requires disabling pop-up blocking programs, including those associated with anti-virus software, spyware, and third-party browser extensions, such as Yahoo or Google tool bars.

## Setting your Time Zone

### To set your time zone:

1. Click **Profile** in the upper right hand corner. The Personal Profile screen is displayed.
 
2. Click the **Time Zone** list arrow.
 
3. Scroll down the list and find your time zone.
4. Click the time zone from the list.
5. Click **Save** button.
6. After updating your time zone selection, you need to logoff and log back on to Global Partner Portal in order for your changes to take effect.

**Note:** SVI submit dates for eligibility and payment fields are stored and displayed in GMT time zone. However, other fields

such as the Opportunity Create Date, are stored in the GMT time zone but displayed in your view based on the time zone selected in your profile. Example: If your profile uses the USA Pacific time zone, and you created an opportunity at 1/1/2007 6PM, the date and time stored in the Global Partner Portal application will be 1/2/2007 2AM GMT. Another user from your firm using USA Eastern time zone will see 1/1/2007 9PM displayed in their view. An opportunity submitted late evening may result in a Global Partner Portal timestamp of the following day.

## Arranging the Columns in Your Workspace

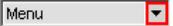
Arrange the columns in your workspace so that you see the most relevant columns first. Some columns that might be useful to you might not display in your default workspace. Business Partners participating in SVI should add Overall SVI Status, Submit Date for SVI Eligibility, Submit Date for SVI Payment Request, Expiration, and SVI Extension Request to their Opportunities view. Standard columns that are recommended to be included are: Account, Contact, Decision Date, Description, Opportunity Currency, Opportunity Num, Probability %, Revenue, and Sales Stage. If you are not participating in the OM or BCC programs, you can remove the GPP Oppty Accept Status, BCC Certification Stage, BCC Certification Status and Status columns from your view.

## Arranging columns

To arrange columns in the Opportunities view:

1. Click the **Opportunities screen tab**.



2. Click the **Menu list arrow**.
 
3. Click **Columns Displayed**.
4. Select one or more column names, by using the **Ctrl** or **Shift** keys, in the **Available Columns** box or **Selected Columns** box. Use the arrow icons to show or hide the columns by moving them from the **Available** column to the **Selected** column or back to the **Available** column.
5. In the **Selected Columns** box, select a column name and use the following icons to reorder the columns.
6. Click **Save**. The columns now display in the order that you indicated.

**Note:** To change the settings back to the default, click **Reset Defaults**.

## Overview of Creating and Submitting an Opportunity for SVI Eligibility and Payment

The basic steps in creating and submitting a new opportunity for SVI consideration are listed below. All of the steps should be completed within the Opportunities view in Global Partner Portal.

1. Create a Draft Opportunity for your potential business solution sale.
  - Find an Account, if not found, create a new Account
  - Select Restriction Flags
  - Add Revenue Records to your Opportunity
  - Add Contacts to your Opportunity
  - Add Sales Team members to your Opportunity
  - Attach Documentation to your Opportunity
2. Submit your Opportunity for SVI eligibility.
3. Update your Opportunity as Won.
4. Submit your Opportunity for SVI payment request.

### Creating an Opportunity

To create a draft Opportunity record:

1. Click the **Opportunities** screen tab. The **Opportunities** screen, **My Opportunities** view is displayed.
  - Note:** The opportunities that display in the **My Opportunities** view are:
    - Opportunities that you created
    - Opportunities that include you in the sales team
2. Click **New**. The Opportunity applet is displayed.
3. Click the **Account** field control icon.
4. Query for your Account using the procedures in "Finding an Account within the Opportunity", "Finding an account from the Account Screen", and "Creating an Account from within the Opportunity" in this document.
5. To select the account, click the chevron  beside the account.
6. Enter a description of the opportunity in the **Description** field.
7. Click the **Revenue** Control icon. .
8. Enter the revenue value in the **Amount** field.
9. Click **OK**.
10. Select a **Sales Stage** field value for the opportunity. As the sales stage increase, additional fields must be completed before the opportunity can be saved. Refer to the [SSM education material](#) for definitions of Sales Stages. For new or inexperienced Global Partner Portal users, our recommendation is to select Sales Stage 01 when initially creating a SVI opportunity. You will need to add Revenue records to your opportunity using the procedures in "Adding Revenue Records with Brand Families" in this document, and update your opportunity to Sales Stage 04 prior to submitting it for SVI eligibility consideration. If you have selected Sales Stage 01, continue with the next step in this topic. If you have selected Sales Stage 04, at least one Detailed Revenue Record must be entered before being able to proceed with the remaining sequence of steps as

documented in this Quick Reference Card; Refer to steps 5-16 in the "Adding Revenue Records with Brand Families" topic for next steps.

**Note:** If you create an Opportunity and advance it to Sales Stage **04-Validated**, the **Probability %** field *must* be completed. If your opportunity is in Sales Stage 4:

**And the customer situation is:**      **Enter the following percentage in the Probability % field:**

The customer is assessing solutions from multiple sources; some uncertainty exists.      25%

The customer is leaning toward the IBM solution and the proposal has been submitted.      50%

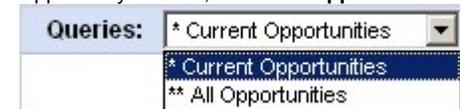
The customer indicates a preference for an IBM solution.      75% or 100%

11. Select Restriction choices using the procedures in "Selecting Restrictions" in this document to determine how to set the **Work in GPP** and **Is Restricted** fields.
  12. Complete or change the default values of other required fields, such as **Decision Date**, **Probability %** and **Opportunity Currency**, as appropriate. The Decision Date is the forecasted close date of the opportunity.
    - Note:** A red asterisk (\*) denotes a Global Partner Portal required field. Additional fields are required by SVI. Refer to the [SVI Business Partner Operations Guide](#) for a complete list of required fields. Additional fields that are not required for SVI can be ignored.
- Additional information can be found at:
- a. Refer to the Help topic **Attaching supporting documents** for information about adding attachments.
  - b. Refer to the Help topic **Adding contacts to an opportunity** for information about how to complete the **Customer Contact** field.
  - c. Refer to the Help topic **Adding sales team members** for information about how to add team members to an opportunity.
13. **For U.S.A. opportunities only**, if applicable, IBM will contact the Business Partner regarding ITAR compliance. To review ITAR information, click the following Online Help topic, [Using International Traffic Arms Regulation \(ITAR\) opportunities](#).
  14. Click the **Save** button. You have now created and saved a new opportunity and it has an **Overall SVI Status of Draft**. The opportunity must be a minimum of stage 04-Validated/Qualified before submitting it for SVI eligibility. See "Overview of Creating and Submitting an Opportunity"

in this document for a list of additional steps required prior to submitting your Opportunity for SVI Eligibility consideration.

**Notes:**

- Enter your Opportunity into Global Partner Portal before you discuss it with others. If you have identified a new opportunity, you must be the first Business Partner to submit it in Global Partner Portal for SVI eligibility, and submit it before it is identified by the IBM Direct sales team, in order for it to be approved as eligible to participate in SVI.
- Do not use any of the Opportunity Queries except for Current Opportunities and All Opportunities. **Current Opportunities** displays all opportunity records with Create Dates that are less than one year old. To view all of your opportunity records, select **All Opportunities**.



- DO NOT use the **Menu** icon to create opportunity records using **New Record** or **Copy Record**. To create new opportunity records, you must click the **New** icon in the **Opportunities List view** or the **Opportunity Header view**.
- If you attempt to advance to another screen without saving your changes, the following message is displayed, "You have unsaved changes. Continue?"
  - Click **Cancel** to return to the screen and save your changes.
  - Click **OK** to continue without saving your changes.
- The IBM SVI team does not review any software records that are submitted as part of your BCC Certification Review Request opportunities.
- Please type the account address and customer information using proper mixed case. Please do not enter data in ALL CAPS.

### Creating an opportunity - Fast Path

If you use the same accounts repeatedly in creating opportunities, you can quickly create new opportunities using the **Account** tab. From the **Accounts** tab, you can now see any accounts where the account record, opportunities, or contacts have been created by someone in your firm, or where anyone in your firm is on the sales team.

**Note:** You can only create opportunities for accounts you have used before from this tab. If you are creating an opportunity for a new account, start on the **Opportunities** tab, and follow the steps in the "Creating an Opportunity" topic in this document.

To create an opportunity for one of your accounts:

1. Click the **Accounts** tab to access this view. A list of your accounts is displayed.
2. Click the hyperlink in the **Account Name** field
3. Click the **Opportunities** view tab.
4. Click **New**. The Opportunity applet is displayed.
5. Refer to the topic "Creating an opportunity" in this document to complete creating an opportunity

**Notes:** The **Organization** column, in the **Accounts** view, can have one of three different types of values:

- If the field shows the name of your firm, these are accounts your firm has created and you are still able to modify.
- If there is a country code in this field, i.e., US, the account is in the IBM account list and you are not able to modify it.
- If there is another Business Partner's name in this field, this indicates the account was created by that Business Partner firm and someone from your firm is on the Sales Team. You can't modify these accounts.

Account Name	Main Phone #	Organization	City	State
OmniCo, Inc.	503-226-6400	Globe Co	Portland	OR
Omni-Globe	503-552-9420	Globe Co	Portland	OR
BlagCo	206-583-0500	Globe Co	Seattle	WA
Allied Products	+1(701)253-2929	US	Fargos	ND
Delta Products	+1(404)576-2525	US	Allanta	GA
Amalgamated Industries	+1(206)650-6666	US	Seattle	WA
Delta Industries	404-433-8900	Cool Computers	Allanta	GA

## Finding an Account within the Opportunity

Key points to remember about searching for an account:

- The Account pick list only displays those Account records that your firm has created and saved. If your firm has not yet created any Accounts, the pick list will be empty.
- When you query for an account from the Account pick list, the query function will only search existing IBM customer records created by IBM.
- Due to privacy legislation, the customer records that are displayed in the Account Query, are from an IBM marketing database, and not actual installed account information. As a result, the Account displayed may not be an appropriate match for the SVI program. If you cannot find an appropriate matching Account record, exit the query and instead follow the steps "Creating an Account from within the Opportunity" in this document.
- You will only see the accounts located in the country for the active position defined in your Global Partner Portal profile.

To change your position follow the procedures "Changing your Active Position" in this document.

You can scroll the list of Accounts your firm created, query the list of IBM-created accounts, or create a new account record. After completing these steps, return to "Creating an Opportunity" in this document and continue with step #4. Always search your firm's account list and IBM-created accounts before creating a new account.

To scroll the list of your Accounts:

1. On the Opportunities screen, click the **Account** control icon. A **Pick Account** list applet will display.
2. Use the arrows in the upper right hand corner of the window to scroll forward and backward.
3. Click the list chevron to select the Account record you desire. The background of the Account record will be highlighted in yellow
4. Click **OK**. The Account record is filled in on your Opportunity

To search the IBM created Accounts:

1. On the Opportunities screen, click the **Account** control icon. A **Pick Account** list applet will display.
2. Click **Query**. The Pick Account query applet is displayed.
3. Review the Country displayed. If you wish to search for Accounts in another country, then click the Country button in the lower right hand corner. The **Pick Country** list applet is displayed. **Note:** Only users in certain countries can change the country selection.
4. Click the list chevron to select the Country you desire. The background of the record will be highlighted in yellow.
5. Click **Pick**. The Country selection in Pick Account query applet is changed to the country you selected.
6. In **Account** field enter the first word or at least two characters and an asterisk. **Note:** Narrow your search by including additional data. Also, a search on ABC\* will search for Account names starting with ABC, while a search of \*ABC\* will search for Account names containing ABC. The Query field is case-sensitive.
7. Click **Go**. If you get a message "FxHub is not yet deployed. Only Accounts from GPP will be fetched." Press OK and wait for account search to complete. The Query results are displayed.
8. Scroll through the list using the arrows in the upper right hand corner of the window until you find the Account and the desired Address. **Note:** The street address must be the same that appears on the Customer's Passport contract

9. Click the list chevron to select the Account record you desire. The background of the Account record will be highlighted in yellow.
10. Click **OK**. The Account record is filled in on your Opportunity.
 

**Note:** If you do not find the matching Account name and Address you desire, then click **Cancel** to return to the **Pick Account** List applet and create a new Account record.

## Finding an account from the Account Screen.

From the **Accounts** tab, you can see any accounts where the account record, opportunities, or contacts have been created by someone in your firm, or where anyone in your firm is on the sales team.

To find existing accounts that you use frequently:

1. Click the **Accounts** tab. A list of your accounts is displayed.
2. Scroll or use **Query** to locate accounts that you frequently use, but are not displayed on the initial screen.

**Note:** See the topic "Creating an opportunity - Fast Path" for an explanation of the values displayed in the Organization column on the Account screen.

## Creating an Account from within the Opportunity

Business Partners should always try to find an account before creating a new one in Global Partner Portal. You *must* create an account from the **Opportunities** screen (first perform steps 1 thru 3 under "Creating an Opportunity" in this document). Do **not** use the **Accounts** tab to create accounts. You can view accounts that you have used previously on that screen, but **do not** create new accounts on the **Accounts** tab.

To create a new Account record:

1. Click the **Account** control icon. A **Pick Account** list applet will display. **Note:** Do not type an Account name directly in the **Account** field.
2. Click **New**. A **Pick Account** data entry screen is displayed.
3. Enter the customer's full legal name in the **Account** field. Complete the **Address, City, Zip Code, Country and State** fields that are required for SVI.
4. Click **Save**. The new Account now appears on the **Pick Account** list applet screen. The Account will be selected and the background of the Account record will be highlighted in yellow.
5. Click **OK**. The Account record is filled in on your Opportunity

**Notes:** Some accounts (for example Government) may not be eligible for SVI fees in your country. Refer to the [SVI Operations Guide](#) for your country for full details on eligible end user customers.

### Changing your Active Position

Your Global Partner Portal profile contains a position indicator for each country you do business in. If your firm does business in more than one country, the same Global Partner Portal user can manage all Opportunities that a Business Partner firm has entered into Global Partner Portal, but only one position for a user can be active at one time. You will only see the IBM created Accounts located in the country for the active position. **Note:** When there is a legal grouping of countries, such as the European Union, then the position defined for these countries will be able to select a country when searching for IBM created accounts.

To make a different position active, perform the following steps:

1. Click **Profile** located in the upper right hand corner of the Global Partner Portal home page.
2. Click **Active Position** control icon.
3. Click the list chevron  to select the Position record you desire, the background of the Position record will be highlighted in yellow.
4. Click the **Primary** flag.
5. Click **OK**.
6. Click **Logout**.
7. Log back into Global Partner Portal. Your position will be changed. You will now only see accounts for this active position.

### Selecting Restrictions

In Global Partner Portal, you have a choice to share opportunity data with IBM's Customer Relationship Management (CRM) Opportunity Management system that is used by IBM's internal sales force (IBM's CRM system). When you create an opportunity, you can decide to share an opportunity fully (**Full Disclosure**), partially (**Is Restricted**), or not share (**Work in GPP**) with IBM's CRM system and direct sales teams. You can select the **Work in GPP** or **Is Restricted** settings only for opportunities that you create. Opportunities that IBM users created and assign to you will have a status of **Full Disclosure** and cannot be changed.

To select the **Is Restricted** and **Work in GPP** checkboxes to restrict your opportunity data:

1. From the Opportunity Header Record, click the **Is Restricted** and **Work In GPP** checkboxes. Checkmarks appearing in these fields mean that the restriction has been selected.
2. Click **Save**.

3. You can use the steps described in the topic on "Arranging Your Workspace" to add these two fields to your Columns Displayed on your main **Opportunities** View.

#### Notes:

- The **Work in GPP** can only be checked at the time the opportunity is initially created, but can be unchecked at any time.
- The **Is Restricted** field can be checked or unchecked at any time.
- If you do not restrict your opportunities, you will see a warning message advising you that your data will be shared. You must click **Cancel** to close the warning message screen, and then select the **Is Restricted** and **Work in GPP** checkboxes. If you click **OK** when presented with the warning message, your opportunity data will be shared with IBM's CRM system, and the **Work in GPP** choice will no longer be editable.
- Once your opportunity has been closed and the Sales Stage has been updated to a **07-Won/Implementing** or **11-Lost To Competition**, the opportunity data will be shared with IBM's CRM system regardless of the restrictions selected.
- Selecting the **Is Restricted** field and not selecting **Work In GPP** field will allow your opportunity data to be shared with IBM but the **Account Name** field will be **Blocked From View** in IBM's CRM system.
- These restrictions do not affect the ability of IBM Channel Representatives to view those opportunity records in Global Partner Portal, where you have added them to your sales team.

### Adding Revenue Records with Brand Families

To add a Revenue record with the Brand Family to an Opportunity:

1. Click **Opportunities** screen tab. The Opportunities screen, My Opportunities view, which contains a list of your Opportunities, is displayed.
2. Scroll down the list of Opportunities to find your Opportunity or click **Query** button.
3. Click the **blue hyperlink** in the **Opportunity Num** field to select the Opportunity. The Opportunity details are displayed.
4. Scroll down to the bottom half of the screen, and click **Revenues** view tab. The Revenues applet is displayed.
5. Click the **New** button on the Revenue view. A new Revenue applet is displayed
6. Click the **Type** control icon.
7. Click the list chevron  next to the Type you desire and click **OK**.

**Notes:** Typically, SVI Opportunities will have a Type of Software, although there are some software products that do

- fall under different Types such as Systems and Technology Group.
8. Click **OK**.
  9. Click the **Brands Family** control icon.
    - Note:** You can directly access the list of current [SVI Eligible Part Numbers](#) and their corresponding product Type and Brand Family by clicking the pdf icon , located next to the **Brand Family** field name.
  10. Scroll down the list of Brand Family to find your Brand Family or click **Query** button.
  11. Click the chevron  next to the Brand Family you desire and click **OK**. **Note:** The **Brand, Brand Family SVI Participation** and **Brand Certification Achieved** fields are filled in by the system where applicable, after the revenue record is saved.
  12. Click **OK**.
  13. Complete the **Bill Date** (if different from the default date, which is 90 days from the date that the record is created), **Win Probability, Quantity, Price** and total **Revenue** fields.
  14. Click **Save** button on the **Revenues** view.
  15. Click **Recalculate Revenue** button to update the **Revenue** on the Opportunity.
    - Note:** The **Revenue** field in the opportunity header record is not automatically updated when you create or update revenue records. To update this field, if you do not see a **Revenue** view tab:
      - a. Exit the opportunity record.
      - b. Reselect the opportunity.
      - c. Open the **Revenue** tab.
      - d. Click the **Recalculate Revenue** icon.
  16. Click **Save**.

#### Notes:

- You must add a separate Revenue record for each Brand Family included in the Opportunity. But only include one revenue line item record per Brand Family. The Online Help in the Global Partner Portal tool includes a link to the current list of [SVI Eligible Part Numbers](#), and the corresponding product Type and Brand Family that must be entered in this section of the Revenue Record. You will only earn SVI fees for those eligible software part numbers acquired via Passport contracts that match the product Type and Brand Family registered and approved in the Global Partner Portal tool. Only new license revenue is eligible. Renewals and reinstatements are not eligible. License revenue sold as a result of a Passport compliance audit is not eligible for SVI fees.
- Bill Date is the forecasted close date of the Opportunity.
- For SVI opportunities, the **Flowcode** and **Platform** fields can be left blank on the Revenue data entry screen.
- Use the Passport SVP (Suggested Volume Price) or the Special Bid discounted SVP price in the Revenue record.

Refer to the [SVI Operations Guide](#) for your country for the Revenue minimum order threshold for your country.

- A "Y" in both the Brand Family SVI Participation and Brand Certification Achieved columns indicates that this is a Brand Family that is eligible for SVI consideration.
- The Probability % you entered on the Opportunity is for the Overall Opportunity. If you have multiple line items in your Revenue view you can assign different percentage odds to different revenue components of the Opportunity.
- If the currency in the individual Revenue record (**Revenue** field) is different from the Opportunity (**Detailed Revenue Data** field), click **Save** to refresh the screen. For example, if the **Revenue** field in the individual revenue record shows the amount in Euros and the **Detailed Revenue Data** field in the header record shows US dollars, refresh the screen. This will not do a currency exchange conversion; you will need to do that manually, if needed.

### Adding Contacts to an Opportunity

A customer contact is the person you call to make a sale at the account. Do not use the **Contact** field to add Business Partners employees; instead, use the **Sales Team** field..

**Note:** For SVI opportunities and accounts, you must supply at least one Customer Executive contact.

To add a contact to an opportunity:

1. Click the **Opportunities** screen tab. The **Opportunities** screen, **My Opportunities** view is displayed.
2. Scroll down the list of opportunities to find your opportunity or click **Query** and find the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field. The opportunity details are displayed.
4. Click the **Contacts** view tab in the lower half of the applet. The **Contacts** applet is displayed.
5. Click **Add** in the **Contact** view. The **Add Contacts** applet, which contains a list of the existing contacts, is displayed.
6. To add a contact from the list:
7. Select the check box beside the contact record.
8. Click **OK**. The **Contacts** view is displayed and the new contact is added.

To create a new contact:

1. Click **New** in the **Add Contacts** applet. The new **Contact** data entry applet is displayed.
2. Complete the following fields:
  - **Last Name\***

- **First Name\***
  - **Email**
  - **Work Pone #**
  - **Mobile Phone #**
  - **Alt Language Last Name** (if applicable)
  - **Alt Language First Name** (if applicable)
  - **Job Title**
3. Click the **Address Line 1** field control icon to select an address different than the default.
  4. Select one of the following: (optional)
    - **Never Mail**
    - **Call**
    - **Never Call**
  5. Enter any comments as necessary
  6. Click **Save**. The opportunity contacts are displayed, and the new contact is added.
- Note:**
- The SVI required fields for Contacts are: **Customer Last Name, First Name, Job Title, Phone# and Email.**
  - Only Customer Executive contacts should be added to the Contacts section. Use the **Sales Team** view to add Contacts belonging to the Business Partner firm.

### Adding Sales Team Members

When you create an opportunity in Global Partner Portal, you are automatically the owner of that opportunity..

**Note:** When you add sales representatives from your firm or IBM Channel Representatives to your sales team, the following conditions apply:

- Sales team members are added to the opportunity by the opportunity owner or creator.
- All sales team members with update access to the opportunity sales team can add other employees from their organization to the sales team.
- Employees who are designated as an organization's Opportunity Focal Point can update the sales teams about their organization's opportunities.

**Note:** You can only add IBM Employees to the opportunity sales team who are enabled on Global Partner Portal, which includes IBM Channel Reps and Business Partner Software Sales Reps (SSR-BPs).

### Adding Sales Team Members from Your Firm or IBM Channel Representatives

To add a sales team member from your firm or IBM Channel Representatives:

1. Click the **Opportunities** screen tab.

2. Find the opportunity or click **Query**.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field. The Opportunity details are displayed.
4. Click the **Sales Team** control icon on right side of the opportunity header to display your current sales team member.
5. Click **Add** to add a new Sales Team member.
6. Click **Query**.
  - a. To find your IBM Channel Rep, complete the fields in the form.
  - b. Type `IBM Channel*` in the **Position** field.
  - c. Click **Go**. The query results are displayed.
7. Select the check box beside the sales team member record that you want to add to the opportunity.
8. Click **OK**.
9. Enter the role for the team members from your Firm (optional). For example:
  - **ISV Partner**, if you are working on the opportunity as an Independent Software Vendor
  - **Syst Integrator-SI Consultant**, if you are working as a System Integrator or Consultant.
10. Click **OK**. The Sales Team view is displayed with the new sales team member.
11. Repeat steps 5 through 9 for adding other sales team members.
12. Click **Save**.

An email message is sent to the new sales team member from your firm notifying them that they have been added to the sales team. No action is required on their part.

**Note:**

- If you are designated as the primary on the sales team for an opportunity or opportunity owner, only you can add an IBM Channel Representative to the sales team for the opportunity
- If you are not the primary, you will not be able to add IBM Channel Representatives and you will only be able to see individuals in your organization. IBM Channel Representatives will have IBM Channel Rep in the **Position** field and will have read-only access to the Opportunity.
- If you are designated as the primary on the sales team for an opportunity or opportunity owner, only you can pass the primary flag to another sales team member. The primary flag cannot be passed to an IBM Channel Representative.

To designate another sales team member as the Primary for an opportunity:

1. Click the **Sales Team** field control on the opportunity header applet.

- To select the sales team member, click the chevron beside their name.
- Click the **Checkbox** next to sales team member's name in the primary column
- Click **Save**.
- Click **OK**.

Within the Sales Team applet, the **Owner BP Oppty Number** field can be used to enter and save an alphanumeric value that is more meaningful to you than the opportunity number that is automatically generated by Global Partner Portal. This information can only be recorded in the owner's applet of the sales team record. After the opportunity number is entered, the opportunity number of the opportunity owner (sales team member with the primary checkmark) is displayed on the opportunity header in the **Owner BP Oppty Number** field. The **Owner BP Oppty Number** is an optional field.

To add your opportunity number for an opportunity:

- Click the **Sales Team** field control on the opportunity header applet.
- Click the **BP Oppty Number** field.
- Type your opportunity number.
- Click **Save**.
- Click **OK**.

### Adding Sales Team Members from another Business Partner

If your firm and another Business Partner firm have established a collaboration, you can add sales team members from another collaborative Business Partner organization to the opportunity sales team.

**Note:** A collaboration agreement must be set up between your organization and the other Business Partner organization prior to your executing these steps.

To add a sales team member from another Business Partner:

- Click the **Opportunities** screen tab. The Opportunities screen, My Opportunities view, which contains a list of opportunities, is displayed.
- Find the opportunity or click **Query**.
- To select the opportunity, click the blue hyperlink in the **Opportunity Num** field. The opportunity details are displayed.
- Click **Collaborate**.  
The list of individuals from outside your organization that have been established through collaboration and that are available for you to add to the opportunity Sales Teams is displayed.

**Note:** If you do not see the organization or employee that you are looking for, a collaboration with that Business Partner organization has not been established.

- Find the sales representative that you want to add to the opportunity sales team.
- Click the checkbox next to the Business Partner employee you would like added to the opportunity sales team.
- Click **OK**. The Opportunity screen is displayed.

An email message is sent to the new Sales Team member at the collaborating Firm notifying them that they have been added to the sales team. No action is required on their part.

#### **Note:**

- Only the opportunity owner, who is the Primary sales team member, can add or delete members of the sales team from their firm or collaborating firms.
- The opportunity focal point can only add or delete members of the sales team from their firm.
- After an employee of another Business Partner firm has been added to the sales team, the individual added, can add additional sales team members from within their firm.

To verify the Sales Team is complete:

- Click the **Sales Team** control icon.  
The members of the sales team, including the Business Partner employees, are displayed in the sales team applet.
- Click **OK** to close the applet.
- Click **Save**.

### Attaching Supporting Documents

Attachments are documents that can be stored with the opportunity in Global Partner Portal.

**Note:** Any opportunity sales team member who has edit access to the opportunity can add an attachment to the opportunity.

To attach documents to an opportunity:

- Click the **Opportunities** screen tab.
- Scroll down the list of opportunities or click **Query** to find your opportunity.
- To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.  
The opportunity details are displayed.
- Click the **Attachments** tab in lower half of the **Opportunity Detail** form applet. The **Attachments** view and the list of current attachments are displayed.
- Click **New**. A blank attachment form is displayed.
- Click the **Attachment Name** field control icon . The **Add Attachment** applet is displayed.
- Click **Browse** and find the attachment on your local drive.
- Highlight the file, and then click **Open**.
- Click **Add**. The **Attachment** view is displayed, and the attachment is displayed in the **Attachment Name** field.

- To add a comment:
  - Click the **Comments** field.
  - Type the note or comment.
- To share the attachment with IBM, select the **Release to IBM** check box.

This check box *only* controls whether IBM can view the attachment. If the checkbox is clear, IBM cannot view the attachment, even if they are on the sales team. The members of your sales team that are not from IBM (including members added from another Business Partner organization for collaboration purposes) can view the attachment regardless of whether the check box is checked or unchecked.

- Click the **Attachment Type** field arrow.
- Click the appropriate type. Decide if the attachment type should remain set to the default non SVI or changed to one of the following:

- SVI BANT**
- SVI Extension Request**
- SVI Sales Criteria**

#### **Note:**

- Any attachment with an attachment type of *SVI Sales Criteria* becomes read-only and cannot be deleted or modified after the opportunity is submitted for SVI payment. Therefore, make sure you select the **Release to IBM** checkbox before you submit the opportunity for SVI payment

- If you add an attachment with this attachment type after you have submitted the opportunity for SVI payment, it becomes read-only and cannot be deleted or modified after it is saved the first time. For IBM to be able to view the attachment, select the **Release to IBM** checkbox before you save the attachment. Otherwise, for IBM to view the attachment, you must:
  - Create another attachment for the same document.
  - Click the **Release to IBM** checkbox on the *new* attachment.
  - Save the attachment.

- Click **Save** in the **Attachment** view.

#### **Note:**

- Business Partners should Attach and Release the BANT Criteria Template when submitting Opportunities for Eligibility. The BANT (Budget / Authority / Need / Timeframe) template is designed to document that the Opportunity has matured to **Sales Stage 04** as a Validated/Qualified Opportunity and should include a description of your value-add solution. License compliance, Passport contract management, and license fulfillment

activities are not valid SVI solutions. Once an Opportunity has closed and you are Submitting for Payment Request, use this procedure to Attach and Release your supporting sales documentation. You can continue to add additional documents to the Attachments tab while your opportunity is in any Status.

- If you have a large file or a large number of files to attach:
  - a. Zip the files that you want IBM to see together and add the zip file as one attachment
  - b. Select the **Release to IBM** checkbox.
  - c. Zip the files that you do not want to release to IBM to another zip file and attach the zip file to the opportunity, but do not select the **Release to IBM** checkbox. IBM is not able to view the attached file.
- Do not attach executable software application files as attachments.

### Submitting an Opportunity for SVI Eligibility

To submit an Opportunity for SVI eligibility:

1. Click the **Opportunities** screen tab.
2. Find the opportunity or click **Query**.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
4. Scroll down to the bottom half of the screen and click each view tab. Ensure that your data entry is complete and saved on all the required fields. You can ignore the **Activities** and **Opportunity Registration** view tabs for SVI opportunities. Refer to the [SVI Operations Guide](#) for a complete list of required fields. **Note:** Until you have added a valid software Brand Family to the **Revenue** tab and one where your company has the necessary certifications, the data fields on the **SVI** tab do not populate.
5. Click the **Software Value Incentive** view tab. The SVI applet is displayed.
6. Click the **Sales Stage** list arrow and select the appropriate sales stage value. The Sales Stage must be a minimum of 04-Validated/Qualifying prior to submitting the opportunity for SVI eligibility consideration.
7. Click **Save**.
8. Click **Submit For Eligibility**.  
**Note:** The opportunity and any changes are automatically saved when you click **Submit For Eligibility**.

To verify that your Opportunity has been properly submitted, follow the following procedures:

1. Click the **Opportunities** screen tab. The **Opportunities** screen, **My Opportunities** view, which contains a list of Opportunities, is displayed.
2. Scroll down the list of Opportunities or click the **Query** button to find your Opportunity.

3. Click the blue hyperlink in the **Opportunity Num** field to select the Opportunity. The Opportunity details are displayed.
4. Click the **Software Value Incentive** view tab. The SVI form is displayed. The SVI eligibility status is displayed in the **Overall SVI Status** field in the upper right corner of the SVI header record. Your Opportunity has been successfully submitted if the **Overall SVI Status** has changed from **Draft** to **Duplicate Opportunity Search**.

#### **Note:**

- Alternatively, if you have customized your columns view as described in "Arranging Your Workspace" in this document, you can view the Overall SVI Status of your Opportunity from your main Opportunities view.
- While your Opportunity is in **Duplicate Opportunity Search** status, IBM will be reviewing your Opportunity for SVI eligibility. If your Opportunity is incomplete or if you need to first be added to a matching IBM Opportunity record (for all of your revenue records) before you can be approved for Sell fees, then your:
  - Opportunity will be returned to **Draft** status.
  - The **Submit Date** timestamp will be reset.
  - You need to make the necessary updates prior to resubmitting your Opportunity, at which time your Opportunity will have a new **Submit Date** timestamp.

### Determining the Eligibility Status of a Submitted Opportunity

IBM determines the SVI eligibility for each revenue record where both the **Brand Family SVI Participation** field and **Brand Certification Achieved** field are "Y". Revenue records where either or both of these fields are "N" are ineligible. The IBM SVI team's goal is to review and approve opportunities within five business days from submission. When IBM changes the **Overall SVI Status** of the opportunity, the primary sales team member for the opportunity receives an e-mail notification.

To review the status of a previously submitted opportunity:

1. Access the Opportunity record.
2. Click the **Software Value Incentive** view tab. Once your Opportunity has been approved by IBM, the **Overall SVI Status** in the upper right corner will be either **Eligible Full Participation** or **Eligible Partial Participation**. This refers to the number of line items in your Revenue record that have been approved as eligible for SVI fees.
3. Each of the Revenue records for the Brand Families you entered will have a SVI Status. **Net New Opportunity** is approved for ID and Sell Fees, while **Sales Resource for Opportunity** is Sell Fees only. **Ineligible** appears for those revenue line items for this opportunity that will not be

considered for SVI eligibility. For a complete list and definition of the various SVI Statuses, refer to the [SVI Operations Guide](#).

4. Review the **Submit Date for SVI Eligibility** in your Opportunity record. The Sales Order Close date on the Passport license order must be 15 calendar days after the **Submit Date for SVI Eligibility** (converted to GMT) in order to be eligible for SVI fees.

### Updating a Previously Submitted Opportunity

To update a previously submitted Opportunity:

1. Access the Opportunity record.
2. Click the **Revenue** tab.
3. Click the fields that can be updated such as **Quantity**, **Price Per Unit**, **Revenue**, **Probability %** and **Close Date**.  
**Note: Probability %:** The estimated odds of winning the opportunity, for example, 0% (default), 10%, 25%, 50%, 75% or 100%. You assign these odds to the opportunity. You should always attempt to accurately reflect the probability of winning the opportunity in this field. You should continue to update the odds as the opportunity progresses. For opportunities in Sales Stage 04 or higher, the **Probability %** field *must* be completed. See the grid under "Creating An Opportunity" in this document for a list of appropriate percentage odds to assign to your opportunity.
4. Click **Save** after updates are made.
5. Also update the fields that can be updated on the **Attachments**, **Contacts**, **Sales Team** and **Software Value Incentive** tabs.
6. Click **Save** after updates are made. You should always update the Sales Stage first because it determines which additional fields are required to save the record.
7. To update the **Sales Stage**:
  - a. Click the **Software Value Incentive** view tab. The SVI Header is displayed.
  - b. Click **Sales Stage** list arrow.
  - c. Click the correct sales stage from the list.
  - d. Ensure that **Sales Stage** and **Probability %** fields are appropriately matched to reflect the customer situation as explained in the **Probability %** field note.
  - e. Click the **Menu** list arrow in the **SVI Header**.
  - f. Click **Save Record**.

#### **Note:**

- After an Opportunity is submitted for SVI eligibility, certain fields become read-only and cannot be updated. Refer to the [SVI Operations Guide](#) for more detail.

- The following fields cannot be changed: **Brand Family, Type, Account Name, and Account Address for BP Incentives**. A new Opportunity record must be created if these fields need to be changed, or if you want additional Brand Families to be considered for SVI eligibility.

### Updating the Opportunity to Won and Submitting the Payment Request

When the Opportunity is Won, you must change the Sales Stage of the Opportunity to **07-Won/Implementing** before proceeding to submit the opportunity for SVI payment request. The Probability % for closed opportunities should be 100%. Your **Submit Date** for Payment Request must be a maximum of 30 calendar days prior, or 60 calendar days after the Sales Order Close date. Your Submit Date for Payment Request must be prior to the Expiration Date of the Opportunity Record.

Before submitting a Payment Request, verify that the following conditions apply:

- The **Revenue** amount matches the amount sold. If necessary, update the Revenue records in the Opportunity. Use the Passport SVP (Suggested Volume List Price) or the Special Bid SVP price in the **Revenue** tab. Be sure to click **Recalculate Revenue** to refresh your totals, and **Save** your updates.
- All necessary supporting sales documentation is attached to the Opportunity.
- Complete or update the following fields on the SVI Header Record:
  - Passport Advantage 5-digit Agreement #** and/or **Passport/Advantage 7-digit Site #**. Only Business Partners who fulfilled the transaction are asked to submit this information; however, all Business Partners are encouraged to provide this information, if known. It can expedite the fee payment process.
  - Place a check in the box next to **Fulfilling Partner** if you fulfilled the transaction
  - Enter the **IBM Invoice Date** of the Passport license sales order if you were the fulfilling partner.
- Provide or update the Sales Order number in the Opportunity **Comments for SVI** field, or include the information in a document added to the **Attachments** view.

To submit a Payment Request:

Review your Opportunity to ensure that all your edits and updates have been saved. After an opportunity is submitted for Payment Request, some fields become read-only. Refer to the [SVI Operations Guide](#) for more detail.

- Access the Opportunity record.
- Click the **Software Value Incentive** view tab. The SVI Header is displayed.
- Click **Submit Payment Request**.

**Note:** Only Opportunities that are currently in **Eligible Full Participation** or **Eligible Partial Participation** status can be submitted for payment request. Once you submit your Payment Request, the **Overall SVI Status** on the opportunity will change to **Waiting Order Validation**.

### Requesting an SVI Expiration Extension

Once an opportunity is approved for SVI eligibility, the **SVI Expiration Date** is set for 270 calendar days from the Submit Date for SVI Eligibility. Once an Opportunity Record has an Overall SVI Status of Expired, it can no longer be Submitted for Payment Request. If the sales cycle is longer than expected, an extension to the **SVI Expiration Date** can be requested.

New requests can be created if the overall status of the opportunity is Eligible Full Participation or Eligible Partial Participation. Your SVI Expiration Extension request must be submitted prior to the Expiration Date of the Opportunity.

To create a new extension request:

- Click the **Opportunities** screen tab. The **Opportunities** screen, **My Opportunities** view, which contains a list of your opportunities, is displayed.
- Scroll down the list of opportunities to find your opportunity or click **Query** to search for the opportunity.
- To select the opportunity, click the blue hyperlink in the **Opportunity Num** field. The opportunity details are displayed.
- Click the **Software Value Incentive** tab.
- The **Software Value Incentive** screen is displayed.
- Click the **Show** list arrow (immediately below and to the left of the Software Value Incentive tab). The default currently displayed is Show Revenue.
- Click **Request Expiration Extension** to change this view to Show Request Expiration Extension. The **Request Extension** form is displayed.
- Click **New**.
- Complete the required fields: Requested Expiration Date and Justification comments.
 

**Note:** The **Justification** field can contain only 250 characters. If more space is needed, add an attachment and set the **Attachment Type** field to **SVI Extension Request**.
- Click **Save**, then click **Submit**.

**Notes:**

- Save** updates the extension request to 'Draft' status so that you can edit it later.
- Submit** sends the request to IBM and updates the request to 'Pending' status. When the Extension Request Status of a request is 'Pending', it is read-only, however, you still can select the 'Withdrawn' status. Pending requests have a checkmark in the SVI Extension Request field on the SVI Header.

- Make any applicable updates to the Opportunity record before submitting your Expiration Extension request, such as the Forecasted Decision Date, Bill Date, Revenue, Sales Stage, and Odds %.
- Once IBM has processed your request, the Extension Request Status will become Approved or Denied, and the checkmark will no longer appear in the **SVI Extension Request** field.

### The Payment Processing Steps

When your Opportunity status is **Waiting Order Validation**, IBM is searching for a matching Passport Sales Order. If one is found, the Opportunity status advances to **Waiting Sales Verification**. If a matching order is not found within 30 days prior to or 60 days after the Sales Order close date, the status changes to **Sales Order Not Found**.

At **Waiting Sales Verification** status, your supporting sales documentation is reviewed, and IBM may contact you for additional documentation. You can continue to add documents to the **Attachments** view tab while your opportunity is in any status.

Every effort should be made by the Business Partner to attach complete supporting sales documentation at the time the opportunity record is being submitted for payment request. If IBM has requested additional information, you will be able to continue to add documents to the **Attachments** tab, even after the opportunity has been submitted for payment request. Once your sales documentation has been reviewed and approved, the opportunity advances to **Reviewing Payment Rules** status.

If all of the program rules and deadlines are met, the SVI fees are calculated and a check is processed. If the sales documentation rules are not met, the status changes to **Denied For Payment Processing**.

Additional Overall SVI Status values for payment processing are: Approved for Payment, Approved for Partial Payment, Paid, Paid Partially and Not Payable.

See the [SVI Operations Guide](#) for more information on the SVI fee calculation process and Status definitions.

### Closing Opportunity Records

IBM Business Partners should not delete old Opportunity records or Revenue records due to the risk of accidentally deleting a valid opportunity.

If you have an Opportunity that is no longer valid, you can close it. To close an Opportunity:

- Access the Opportunity record
- Change the **Sales Stage** to **11-Lost To Competition** (the Customer choose a non-IBM solution). **Note:** Do not

use Sales Stage 11 for those deals where the customer fulfilled an IBM license purchase from another firm.

3. Click **Reason Lost** on the Opportunity Header.
4. Click to select an option from the list.  
**Note:** Selecting Sales Stage **11-Lost To Competition** causes the Opportunity data to be shared with IBM's CRM system. (See the topic on *Selecting Restrictions*).
5. Click the **Save** button.
6. Alternatively, Business Partners can contact their local SVI team to request that the Overall SVI Status of an opportunity record be updated to **Withdrawn**. Once an opportunity is **Withdrawn** it can longer be submitted for payment request.

If there is a Brand Family line item on the **Revenue** views that is no longer part of the proposed solution:

1. Access the Opportunity record.
2. Click the **Revenue** tab.
3. Change the percentage odds for the revenue record to **0% Win Probability** and the **Revenue to \$0**.
4. Click the **Save** button.

### Certification Requirements

Refer to the [Software Value Incentive Business Partner Operations Guide](#) for your country for full details on certification requirements. If your firm's certification status has changed, update your company profile in the [PartnerWorld Profiling System](#).

A list of [PartnerWorld accepted software certifications](#), as well as a list of [Sales Mastery Tests](#) that can be used to meet your certification requirements can be found online.