Where to go for Help

Help is available for users participating in Value Advantage Plus for Government Sales.

- 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
  - Education Modules
  - Simulations
  - Business Partner Administrator Guides
  - Quick Reference Cards
- PartnerWorld Contact Services
  - Help Desk support is available
- Value Advantage Plus page in PartnerWorld
  - Value Advantage Plus for Government Sales sub-section on **Overview** tab.
  - Value Advantage Plus for Government Sales Operations Guide (**Operations guide** sub-section on **Agreements** tab.)

Note: While opportunity creation is similar for both the Value Advantage Plus for Government Sales and the Software Value Incentive (SVI) initiatives, there are differences in opportunity submission processing. For those Business Partners that are familiar with the SVI processes, the Value Advantage Plus for Government Sales-specific topics are preceded by a **>** within this document. In addition, a comparison of similarities and differences between the two initiatives is listed at the end of this document.

Accessing Global Partner Portal

Your firm may already be using Global Partner Portal for Software Value Incentive and/or Opportunity Management. Before you can register opportunities for Value Advantage Plus for Government Sales, your firm must apply for the program via the PartnerWorld Profiling System and be approved by IBM to participate. View the Value Advantage Plus for Government Sales Operations Guide for the details.

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 **Incentive Registration** view tab, then you are not set up properly in Global Partner Portal for the Value Advantage Plus for Government Sales 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. 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 Global Partner Portal education materials. New users should click on Help in the upper right corner to access Online Help, especially the sections on Understanding the User Interface. For more details behind the topics included in this Quick Reference Card, refer to the Online Help.
5. Global Partner Portal is used for multiple IBM programs - Bid Certification Center (BCC) for hardware, Opportunity Management (OM) for lead passing and co-marketing, Software Value Incentive and Value Advantage Plus for Government Sales for influencing the sale of IBM middleware. See the sections in the Online Help for additional topics on working with Global Partner Portal opportunity records that involve the BCC, SVI or OM programs.

Notes:

- Global Partner Portal users with Windows 2000 operating system should use Internet Explorer Internet Explorer 5.0.1 5.5 or 6.0; Netscape 7.2; FireFox 1.0.3 and above; or Mozilla 1.7.7 and above.
- Global Partner Portal users with Windows XP operating system should use Internet Explorer 6.0 or 7.0; Netscape 7.2, FireFox 1.0.3 and above, or Mozilla 1.7.7 and above.
- 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: Some 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 1/1/2009 6PM, the date and time stored in the Global Partner Portal application will be 1/2/2009 2AM GMT. Another user from your firm using USA Eastern time zone will see 1/1/2009 9PM displayed in their view. An opportunity requested for eligibility late evening may result in a Global Partner Portal timestamp of the following day.

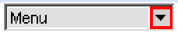
Arranging the Columns in Your Workspace

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. 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, Validation 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 Value Advantage Plus for Government Sales Eligibility Approval and Payment compliance

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

1. Create an 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** BANT form to your Opportunity
   - Add an **Opportunity Registration** record
2. After the deal closes, update your Opportunity as Won for Payment Compliance check.
   - Include IBM sales order number
   - **Attach** sales documentation

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. Refer to the Client Value Method education material for definitions of Sales Stages. 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 creating the opportunity registration record for Value Advantage Plus for Government Sales. 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 Value Advantage Plus for Government Sales. Refer to the Value Advantage Plus for Government Sales Business Partner Operations Guide for a complete list of required fields. Additional fields that are not required for Value Advantage Plus for Government Sales 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. The opportunity must be a minimum of stage 04-Validated/Qualified before submitting it for Value Advantage Plus for Government Sales 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 Value Advantage Plus for Government Sales 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 request eligibility in Global Partner Portal for Value Advantage Plus for Government Sales before it is identified by the IBM Direct sales team, in order for it to be approved as eligible to participate in Value Advantage Plus for Government Sales.
- 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 Value Advantage Plus for Government Sales team does not review any software records that are submitted as part of your SVI or 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.

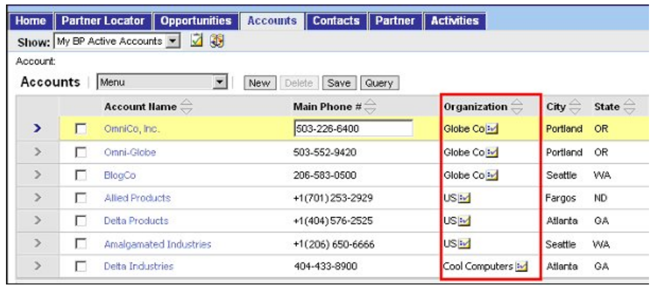
📖 **Note**: You can only create opportunities for accounts you have used before from this tab. If you are creating an opportunity for a new account, start on the **Opportunities** tab, and follow the steps in the "Creating an Opportunity" topic in this document.

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.



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 Value Advantage Plus for Government Sales 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 see a list of accounts where your firm has existing contacts, opportunities or sales team members, export the list from the **My BP Active Accounts view** under the **Accounts** tab. See the topic Finding an Account, the section entitled: Exporting a list of accounts.

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 Value Advantage Plus for Government Sales.
4. Click **Save**. The new Account now appears on the P**ick 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:** Only Government accounts are eligible for Value Advantage Plus for Government Sales fees in your country. Refer to the Value Advantage Plus for Government Sales Operations Guide 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** field 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 the **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, Value Advantage Plus for Government Sales Opportunities will have a Type value 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:** The product Type and Brand Family to which a part number belongs may be determined by looking at the SVI Eligible Part Number List, however there are some part types that are eligible for SVI but are not eligible for Value Advantage Plus for Government Sales. Refer to the Value Advantage Plus for Government Sales Operations Guide for

the details. You can access the SVI Eligible Part Number List by clicking the pdf icon, located next to the **Brand Family** field name.

10. Scroll down the list of Brand Families to find your Brand Family or click the **Query** button.
11. Click the chevron next to the Brand Family you desire and click **OK.**
12. 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.
13. Click **Save** button on the **Revenues** view.
14. 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.
15. 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 Global Partner Portal Online Help 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 Value Advantage Plus for Government Sales 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 sold as a result of a Passport compliance audit are not eligible for the Value Advantage Plus for Government Sales initiative. Refer to the Value Advantage Plus for Government Sales Operations Guide for the description of Eligible Products.
- Bill Date is the forecasted close date of the Opportunity.
- For Value Advantage Plus for Government Sales 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.
- 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 Value Advantage Plus for Government Sales 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.

Notes:

- The Value Advantage Plus for Government Sales 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.

Notes: 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.
- IBM employees with a Position that begins with “IBM Channel Rep Plus” will be able to update and progress your opportunities.

Adding Sales Team Members from Your Firm or IBM

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 members.

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.
        a. **Note(s):**
        - IBM employees with a Position that begins with "IBM Channel Rep Plus" will be able to update and progress your opportunities.
        - If you do not find the IBM employee you are looking for, contact PartnerWorld Contact Services**.**
    c. Click **Go**. The query results are displayed.
    d. Alternatively, Click **Email Address**. If you do not know the IBM employee's email address, see the IBM Employee Directory.
    e. In the **Starting with** field, type the e-mail address of the IBM employee you wish to add. **Note**: you may also choose to query by First Name or Last Name, but you may receive multiple records in your results.
    f. 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. Click **Save**. The Sales Team view is displayed with the new sales team member.
10. Repeat steps 5 through 9 for adding other sales team members.
11. Click **OK**.

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🕮 **Notes**:

- 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.
2. To select the sales team member, click the chevron beside their name.
3. Click the **Checkbox** next to sales team member's name in the primary column
4. Click **Save.**
5. 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:

1. Click the **Sales Team** field control on the opportunity header applet.
2. Click the **BP Oppty Number** field.
3. Type your opportunity number.
4. **Click Save.**
5. 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:

1. Click the **Opportunities** screen tab. The Opportunities screen, My Opportunities view, which contains a list of opportunities, is displayed.
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 **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.
5. Find the Opportunity Focal Point from the other Business Partner firm that you want to add to the opportunity sales team.
6. Click the checkbox next to the Opportunity Focal Point that you would like to add to the opportunity sales team.
7. 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.

🕮 **Notes**:

- 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:

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

Attaching Supporting Documents

Attachments are documents that can be stored with the opportunity in Global Partner Portal. The Value Advantage Plus for Government Sales initiative requires documents be attached to the opportunity record; first when it is submitted for eligibility consideration (BANT) and again when the opportunity is won (sales documentation).

🕮 **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:

1. Click the **Opportunities** screen tab.
2. Scroll down the list of opportunities or click **Query** to find your opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Attachments** tab in lower half of the **Opportunity Detail** form applet. The **Attachments** view and the list of current attachments are displayed.
5. Click **New**. A blank attachment form is displayed.

6. Click the **Attachment Name** field control icon. The **Add Attachment** applet is displayed.
7. Click **Browse** and find the attachment on your local drive.
8. Highlight the file, and then click **Open**.
9. Click **Add**. The **Attachment** view is displayed, and the attachment is displayed in the **Attachment Name** field.
10. To add a comment:
    a. Click the **Comments** field.
    b. Type the note or comment indicating that this document is for the Value Advantage Plus for Government Sales program.
11. 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.
12. Click the **Attachment Type** field arrow.
13. Ensure that the attachment type is set to **Non-SVI** (default).
14. Click **Save** in the **Attachment** view.

Notes:

- Business Partners should Attach and Release the BANT Criteria Template when submitting Opportunities for Value Advantage Plus for Government Sales eligibility consideration. 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 Value Advantage Plus for Government Sales solutions. Once an Opportunity has closed, 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 Value Advantage Plus for Government Sales Eligibility

To submit an Opportunity for Value Advantage Plus for Government Sales eligibility, you will have to create an opportunity registration record for this opportunity. Here are the steps:

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 and that your BANT form is attached. You can ignore the **Activities** tab for Value Advantage Plus for Government Sales opportunities. Refer to the Value Advantage Plus for Government Sales Operations Guide for a complete list of required fields.
5. Click the **Opportunity Registration** view tab. The Opportunity Registration applet is displayed.
6. Click **New** to create a new opportunity registration record. A blank form is displayed. **Incentive Name**, **Incentive Status** and **Serial Number Replaced** fields must be filled in for this program.
7. Click on the field control icon next to **Incentive Name** field, to see the list of incentive types your organization is eligible for. Choose **Value Advantage Plus for Government Sales** from the list and select Pick. (If you don't see Value Advantage Plus for Government Sales in the pick list, then contact the IBM PartnerWorld® helpdesk.)
8. By default, the **Incentive Status** field is set to Requested. Change the Incentive Status to **Submitted for Eligibility**.
9. Enter your organization's Value Advantage Plus Government solution id in the **Serial Number Replaced** field.
10. Click **Save**.

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

1. Click the **Opportunities** screen tab. The **Opportunities** screen, **My Opportunity Registrations** view, which displays a list of Opportunities that have Incentive Registration records.
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 **Opportunity Registration** view tab. The Value Advantage Plus for Government Sales record is displayed. The Value Advantage Plus for Government Sales eligibility status is displayed in the **Incentive Status** field in the Opportunity Registration record. Your Opportunity has been successfully submitted if the **Incentive Status** is set to **Submitted for Eligibility**.

Notes:

- Alternatively, you can view the Value Advantage Plus for Government Sales status of your Opportunity from your main **My Opportunity Registrations** view.
- While your Opportunity is in **Submitted for Eligibility** status, IBM will be reviewing your Opportunity for Value Advantage Plus for Government Sales eligibility. If your Opportunity is incomplete, then your:
    - Opportunity will be set to **Returned** status.
    - You need to make the necessary updates prior to re-requesting your Opportunity. The **Request Date** will remain what it was when the record was first created. This is one of the key differences between Value Advantage Plus for Government Sales and SVI.

> Determining the Eligibility Status of a Submitted Opportunity

IBM determines the Value Advantage Plus for Government Sales eligibility for the entire opportunity, not for each revenue record (like in SVI). If any of the Revenue records is found ineligible then the opportunity registration status is set to **Withdrawn.** When IBM changes the **Incentive 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 **Opportunity Registration** view tab. Once your Opportunity has been processed by IBM, the **Incentive Status** in the upper right corner will be updated by IBM. If the registration is approved as eligible, the status will be set to **Approved**. If it is not approved, the status will be set to **Withdrawn**.
3. Review the **Request Date for Value Advantage Plus for Government Sales** eligibility in your Opportunity Registration record. The Sales Order Close date on the Passport license order must be 15 calendar days after the **Request Date** for **Value Advantage Plus for Government Sales Eligibility** (converted to GMT) in order to be eligible

for a Value Advantage Plus for Government Sales 'instant rebate'.

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**.
   📖 **Notes: 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 **Contacts**, **Sales Team** and **Opportunity Registration** 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 **Opportunity Registration** view tab. The Opportunity 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 opportunity header.
   f. Click **Save Record**.

📖 **Note:** The following fields should not 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 Value Advantage Plus for Government Sales eligibility.

> Updating the Opportunity to Won and Submitting the Sales Documentation

When the Opportunity is won, and you are submitting your purchase order to your preferred distributor, you must change the Sales Stage of the Opportunity to **07-Won/Implementing** and attach the Sales documentation on the **Attachments** tab of the opportunity record within 15 days of the sales order date.

When the sales stage set to **07-Won/Implementing**, the opportunity registration status changes from **Approved** to **Completed**. While placing the sales order, remember to provide the Global Partner Portal opportunity number and your Value Advantage Plus Government Solution ID to your preferred distributor and have them include it on the sales order to IBM. The Probability % for **Completed** opportunities should be 100%. The **Modified Date/Time** for Sales Document attachment must be a maximum of 15 calendar days after the Sales Order Close date. Your Sales Order Date must be prior to the Expiration Date of the Opportunity Record.

Before submitting sales documentation, 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.

📖 **Note:** Only Opportunities that are currently in **Approved** status should have the Value Advantage Plus solution id included in the purchase order. Any violation found during the compliance check will lead to action as described in Value Advantage Plus for Government Sales Operations Guide .

> Value Advantage Plus for Government Sales Opportunity Expiration

The **Expiration Date** of an approved opportunity registration record for Value Advantage Plus for Government Sales is set to 365 calendar days from the Request Date. The Expiration date cannot be extended. After the Expiration Date, the opportunity is no longer eligible for the incentive. After the Opportunity Registration record has expired, the Opportunity can be resubmitted by creating a new Opportunity Registration record for this incentive. Please refer to "Submitting an Opportunity for Value Advantage Plus for Government Sales Eligibility" section on how to create a new Opportunity Registration record. You only have to create a new Opportunity Registration under the same Opportunity. The Opportunity header and Revenue data do not have to be reentered. Make any applicable updates to the Opportunity record before resubmitting your Opportunity, such as the Forecasted Decision Date, Bill Date, Revenue, Sales Stage, and Odds %.

> Post Sale Payment Compliance Steps

For each completed sales transaction to a Government End User where an "instant rebate" has been issued to the Business Partner through their preferred distributor, IBM will conduct a compliance review to assess whether or not the requirements for earning the "instant rebate" were met by the Business Partner.

- Was the Business Partner engaged in the sales cycle and does the sales documentation submitted prove the recommendation of IBM distributed software to the End User?
- Is the Global Partner Portal opportunity number included with the sales order submitted by the Business Partner to their preferred distributor?
- Was the opportunity record submitted at least 15 days before the IBM sales order date?
- Was the sales order date before the expiration date of the opportunity?
- Were no additional revenue records added and/or there were no Brand Family changes by the Business Partner in existing revenue records? If it was changed, the opportunity as originally approved will be the basis for the compliance review.
- Do all of the part numbers on the sales order which received an "instant rebate" belong to a Brand Family which was registered and approved in the Global Partner Portal opportunity?
- Does the revenue as described in the opportunity in Global Partner Portal agree approximately with revenue in the sales order?

Business Partners are expected to update Global Partner Portal with the sales documentation within fifteen (15) days of the IBM Sales Order Date.

If all the questions (above) are answered "yes", IBM will set the opportunity registration record in Global Partner Portal to a status of **Paid**.

If the sales documentation is missing or insufficient, or the opportunity number was not provided on the sales order, IBM will request the additional information from the Business Partner. The Business Partner will be given only one opportunity by IBM to provide the required information within a time period specified.

If the Business Partner does not provide the required information within the time specified, then IBM will change the status of the opportunity registration record in Global Partner Portal to a status of **Not Paid**. As a result, a Conditional Letter will be issued directing the Business Partner to repay the entire amount of the "instant rebate" to their preferred distributor.

See the Value Advantage Plus for Government Sales Operations Guide for more information on the Value Advantage Plus for Government Sales compliance process.

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:

1. Access the Opportunity record
2. 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 update the status of Value Advantage Plus for Government Sales Opportunity Registration record to **Withdrawn**.

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.

Similarities and Differences between Value Advantage Plus for Government Sales and Software Value Incentive (SVI)

What is similar to SVI?

- Business Partner must be the first to register the opportunity.
- Registration must be at least 15 days prior to IBM Sales Order Date
- BANT submission is required with opportunity registration
- Business Partner must provide sales documentation showing they were engaged in the sales cycle.

What is different from SVI?

- Rewards for sales to government end-users only
- No "Sell only" option; Business Partner must be first to identify and register the opportunity
- Approval is at the total opportunity level; No partial approvals, i.e. one brand family is approved and another is denied
- No fee; the reward is given as an instant rebate via the preferred distributor.
- Compliance is performed after the instant rebate is awarded. If Business Partner fails compliance on a transaction, they must repay the instant rebate to their preferred distributor.
- Business Partner must be the reseller; no rewards for sales fulfilled through IBM direct or other Business Partners
- Opportunities expire in 365 days; no extensions available
- Opportunities are submitted for eligibility using the **Opportunity Registration** tab in Global Partner Portal (the Software Value Incentive tab should **NOT** be used)
- Business Partner must indicate their Government Sales Solution ID in the "Serial Number Replaced" field at time of registration
- Opportunity status is visible in the Opportunity Registration tab (**Incentive Status** field).
- Software Value Incentive small deals documentation waiver does not apply