



Where to go for Help

Global Partner Portal Help is available.

- Global Partner Portal Online Help. Click **Help** in the application menu in the upper right corner to access Online Help.
- [Global Partner Portal page on PartnerWorld](#) contains:
 - Education
 - Quick Reference Cards
 - Links to other resources
- [PartnerWorld Contact Services](#)

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.

Please note that all search entries are **case-sensitive**. This quick reference provides you with the steps you need to perform a basic search, and then shows you how to refine your search if necessary.

When performing a search in Global Partner Portal, it is important to include enough information that will produce the desired results. Providing only one parameter may result in too many accounts found; however, performing too refined a search may result in no accounts found.

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, click the **Accounts** tab. A list of your accounts is displayed. You can scroll or use Query to locate accounts that you frequently use, but are not displayed on the initial screen.

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

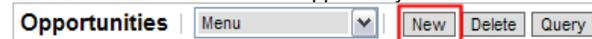
- If the field shows the name of your firm, these are accounts your firm has created and you are still able to modify.
- If there is a country code in this field, i.e., US, the account is in the IBM account list and you are not able to modify it.
- If there is another Business Partner's name in this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

Account Name	Main Phone #	Organization	City	State
OmniCo, Inc.	503-228-6400	Globe Co	Portland	OR
Omni-Globe	503-552-9420	Globe Co	Portland	OR
BlogCo	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 from the Opportunities Screen

To search for an account within an opportunity:

1. Navigate to the **Opportunities** screen by clicking the **Opportunities** tab..
2. Click **New** to create a new opportunity.



3. In the **Account** field of the new opportunity form, click the field control icon.

Notes:

- The account list displays only those accounts that were created and saved by your firm. Do not type an account name in the **Account** field. Use the **Pick Account** applet that displays.
 - You can also click the + symbol in the upper right-hand corner of the screen to scroll through the list of accounts and locate the account you need.
4. If you are looking for an IBM-supplied customer account, click **Query**.
 - Note:** The Query function searches for existing accounts in the IBM set of accounts.
 5. In the **Account** field, type the first word or at least two characters of the account name and an asterisk.

Notes:

- The **Query** fields are case-sensitive.
 - Narrow your search by including additional data.
6. To refine your search consider entering values in the **City**, **Zip Code** fields, or expanding the name in the **Account** field.
 7. To change the country displayed in the **Country** field:
 - Note:** This option is available only if other countries are displayed in the **Pick Country** applet.
 - a. Click the **Country** button. The **Pick Country** applet is displayed.
 - b. Locate the appropriate country.
 - c. Click the chevron to select the appropriate country.
 - d. Click **Pick**. The **Pick Account** applet is displayed.

8. Click **Go**. The query results are displayed.

Local Record	Account	IBM Acct Cust Num	Site	Address	City	State	Zip Code	Country	Telephone	Fax
>	ABC Corporation	MIAM2006-04-06-	11601 4th St N Apt 3704	13.22.17.996000	Saint Petersburg	FL	337162750	United States	(727) 577-0033	

9. Scroll down the list to find the account with the desired address.
10. Click the chevron to select the account record.
11. Click **OK**. The account record displays in your opportunity.

Note: Contact the help desk if you need assistance searching for customer accounts. See the beginning of this quick reference card for additional help options.

Types of accounts and where they are displayed

The following table summarizes the different types of Accounts and where they are displayed.

Account Types	Visible/Accessible in the following:		
	Accounts tab	Opportunities screen --> Account field control --> Pick Account applet	Opportunities screen --> Account field control --> Pick Account applet --> Query
Business Partner created "local" accounts	✓	✓	
IBM accounts (customers)	✓ If your firm has existing contacts, opportunities, or Sales Team members.		✓
Other Business Partner firms' accounts Note: A collaboration between Business Partner firms must exist.	✓ If someone from your firm is on another firm's opportunity Sales Team.		

Creating an Account from the Opportunity Screen

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. Do **not** use the **Accounts** tab to create accounts.

To create an account from the **Opportunities** screen:

1. Search for an account in the **Opportunities** screen. Use the procedure described in the topic Finding an Account from the Opportunities screen in this document.
2. If an exact address match for the account does **not** exist, create a new account starting at the **Pick Account** applet.
3. Click **New**. The **Pick Account** applet is displayed.
4. Type the customer's full legal name in the **Account** field.
5. Type the correct information in the other fields.
Note: The **Address, City, and Country** fields are required.
6. Click **Save**. The new account is now displayed in the **Pick Account** applet.

Note:

- a. If the account is not already selected, click the list chevron . The background of the account record is highlighted in yellow.
- b. Click **OK**. The account record is displayed in your opportunity.

Matched accounts

To avoid duplicating existing accounts, it is very important to do a complete and thorough search, as described in this quick reference card.

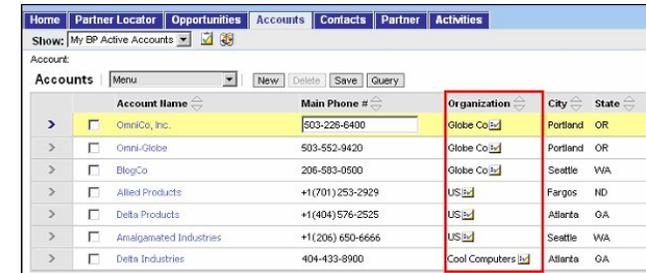
With an expanded customer-account database, the likelihood of finding end-user customer accounts within Global Partner Portal increases.

Accounts already entered into Global Partner Portal will be synchronized with accounts in IBM's CRM system. The following seven fields will be compared against existing records and might be updated, as a result of this comparison: **Name, DUNS Number, Street Address, City, State, Postal Code, and Country.**

If there is an account match in the two systems, the Global Partner Portal customer account will be merged with existing

IBM CRM records. Global Partner Portal accounts not matched will be promoted as a new IBM CRM account record. (see the topic *Promoted Accounts*)

Note: This enhanced function may mean you will see slight changes in the appearance in one or more of the seven fields listed above. For example, 'ABC Corporation' may appear as 'ABC Corp.'



Promoted accounts

Account promotion is an IBM data quality review process. During this process, accounts are reviewed to ensure they are complete and contain data in the following fields: **Name, Address, City, State, Country, and Postal Code**. Accounts are also reviewed to see if they are in the IBM supplied list of accounts. If they are not in this list, the data quality process will promote the account, which means that it will be added to the IBM supplied list of accounts.

This will make the customer account viewable by other Business Partners on Global Partner Portal.

Note: Customer contacts associated with your accounts will not be promoted or viewable by other Business Partners.

You will be able to identify that your account has been promoted by checking the **Organization** field. In a promoted account, this value is changed from the Business Partner organization to the IBM country code. The customer number field is also filled. You will be unable to update an account on your own after the account has been promoted to this list of IBM supplied customer accounts.

Note: If you wish to update an account that has been promoted, contact [PartnerWorld Contact Services](#) and ask for the Global Partner Portal Help Desk.