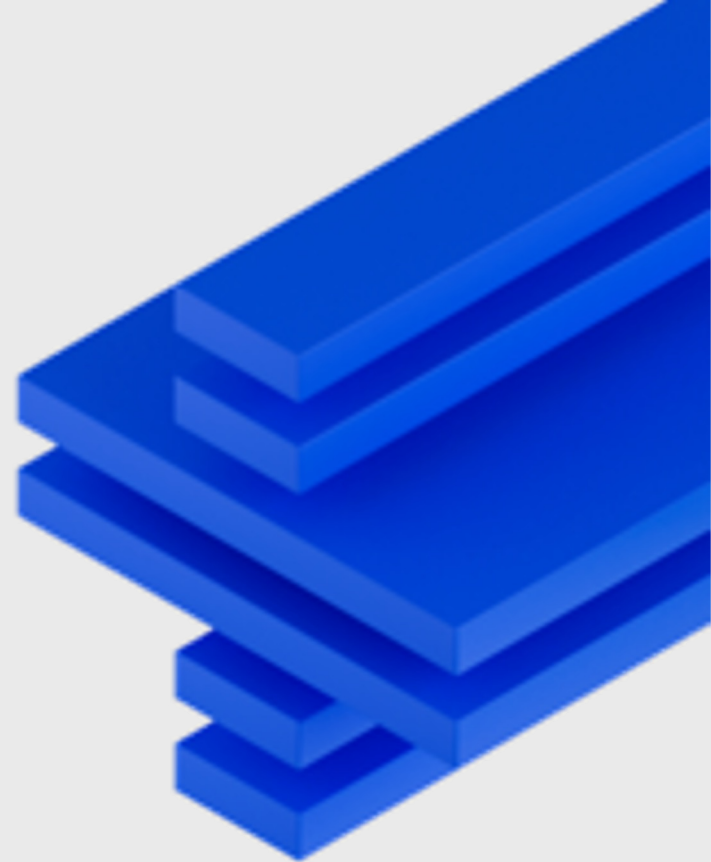


IBM Partner Portal

Business Partners User Guide



http://ibm.biz/IPP_Guide

Last Updated: June 2024

IBM Partner Plus



Introduction

The IBM Partner Portal, **built on Salesforce, is the single pane of glass that partners will use to complete their transactions with IBM.** Based on Partner feedback, we are simplifying the experience by reducing the number of tool and streamlining our processes across the Build, Service and Sell tracks.

IBM has developed a series of videos to help you to navigate in the Partner Portal tool that can be watched in the following link.

<https://partnerportal.ibm.com/>

Index

[Section 1](#) (Page 4)
Getting Access

[Section 2](#) (Page 6)
One Unique Process

[Section 3](#) (Page 7)
IBM Partner Portal Link

[Section 4](#) (Page 8)
Your Opportunities

[Section 5](#) (Page 9)
Register a Deal
(For Software and Hardware,
unifying “Special Bid Protection”
and “Systems Deal Registration”)

[Section 6](#) (Page 10)
Search for Customer

[Section 7](#) (Page 12)
Continue Register a Deal

[Section 8](#) (Page 22 and 23)
General Comments

[Section 9](#) (Page 24)
Opportunities assigned

[Section 10](#) (Page 25)
Deal Registration Review
(Previous Investment Review)

[Section 11](#) (Page 27)
Incentive Management

[Section 12](#) (Page 28)
Claiming Incentives

[Section 13](#) (Page 29)
Sales Stages

[Section 14](#) (Page 31)
Reports of opportunities

[Section 15](#) (Page 32)
Team Member

[Section 16](#) (Page 33)
How to appear in Directory

[Section 17](#) (Page 35)
How to use our ChatBot

[Section 18](#) (Page 36)
Configure your platform

[Section 19](#) (Page 37)
Infrastructure Quote (ePricer)

[Section 20](#) (Page 38)
Software Quote (PGS)

[Section 21](#) (Page 39)
Deal Registration Guidelines

Getting Access

Access to IBM Partner Portal is granted to all employees with “My Sales Activity (MySA)” role identified in Partner Plus Partner Profile, check following table to understand different types of access.

If you need to change a person access to the tool, an **APA (authorized profile administrator) from your company will need to follow these steps:**

1. Enter <https://ibm.biz/partnertools> and log in with your Partner Plus credentials;
2. Select “Update an employee’s profile information” and select the location that this person stays;
3. Select the employee name, see that the word will change from select to selected (as you can see on the print screen on the right);
4. Scroll down and in the field “Select Action”, choose “Employee Roles” and click in the grey arrow;
5. In the section “**Opportunity Management Roles**”, choose the role;
6. And “Submit”.
7. Write down the confirmation code in case you need
8. It takes 24 hours to reflect this change

The screenshot shows the 'Partner Plus Profile' page. On the left is a navigation menu with items: Partner Plus Profile, Worldwide enterprise, Country enterprise, Location, Employee, Relationship management, and Benefits. The main content area has a 'Welcome' message, a 'Country enterprise' section with a note about profile updates, and an 'Employee' section titled 'Actions requiring attention'. Under this section, there are three links: 'Pending personal employee profile updates(2)', 'Manage pending self associations(2)', and 'Pending profile updates(2)'. Below this is a 'Related links' section with 'Contact us' and 'User manual'. A 'Quick task links' section follows, with a note: 'Select a link from the quick task links section to get started on some of the most commonly performed tasks.' Three links are listed: 'Add an employee to your company profile', 'Update an employee's profile information' (highlighted with a red box), and 'Update your personal communication preferences'.

The screenshot shows a table with three rows. Each row has a 'Select' dropdown, a name field, and an 'ACT' button. The first row has 'Select' in the dropdown. The second row has 'Select' in the dropdown. The third row has 'Selected' in the dropdown (highlighted with a red box). Below the table is a 'Select action:' section with a dropdown menu showing '... Select one ...' (highlighted with a red box) and a right-pointing arrow.

The screenshot shows the 'Opportunity Management Roles' section. It contains a list of four roles, each with an unchecked checkbox: 'Business Partner Default Opportunity Owner', 'Business Partner OM Focal', 'Business Partner OM Team Limited', and 'Business Partner OM User'. The entire section is highlighted with a red box.

Getting Access - Different Roles

Roles in IBM Partner Portal, please check this table and if you need help contact our [Partner Support Desk](#).

	View all opportunities	Create opportunities	Edit Opportunities	Can Accept Leads	Restricted Entry	Restricted opportunity	Incentives Dashboard
Business Partner Administrator (Formerly Authorised Profile Administrator)	No	No	No	No	N/A	No	No
Global Business Partner Administrator (Coming Soon)	No	No	No	No	N/A	No	No
Primary Relationship Contact	Yes	Yes	Yes	Yes	Yes	Yes	No
OM Focal	Yes	Yes	Yes	Yes	Yes	Yes	No
OM User	Yes	Yes	Only for the opps owned by this person	No	Yes	Yes	No
OM Team Limited	No (only if it's included as team member)	Yes	Only for the opps owned by this person	No	N/A	Yes	No
Incentive Dashboard User	No	No	No	No	No	No	Yes

One unique process: Deal Registration

IBM has simplified the whole process for Systems and Software when managing your opportunities. Now regardless the unit you are selling, **the ONLY steps you will complete is Request Deal Registration.**

This unique process will check all incentives, permissions to sell and if your company was the first to register this opportunity and after this validation the system will automatically create your opportunities and validate your deals registration.

Also, with this new process and to be unified worldwide **it's required that the partner have certifications to be able to register a deal and consequently to request special prices.**

Check this guide for the New and Changed process.

Entering the IBM Partner Portal

Once you enter: <https://partnerportal.ibm.com/>
this is the page you will see.

You will use the tabs on top to check your opportunities information or to request deals.

In the Home page you also have links to different platforms that are available to you.

The screenshot shows the IBM Partner Portal interface. At the top, there is a navigation bar with a search icon, a refresh icon, and a user profile icon. Below the navigation bar, a blue banner reads "Get ready for a faster start in 2024. Validate or assign the Renewal Focal role in your Company profile by January 15th." with a "More Details" link. The main heading is "One place for all your needs" with a sub-heading "Register deals, monitor incentives, track expertise, and grow your partnership with IBM." A search bar is present with the placeholder text "Search by tool name or description". Below the search bar, there are several tabs: Administration, Benefits, Collaboration, Coming Soon, Deal Management, Deals, Education, Marketing, Quotes, Service, Support, and Technical. A "Can't access a tool?" link is also visible. The "All Tools" section displays four tool cards: "Practitioner advanced deployment training", "Service solutions accelerator", "Service technical asset co-creation", and "IBM Partner Plus". Each card includes a brief description and a "Coming Soon" or "Service" tag. Below the tools, there is a "News and updates" section with a "Seismic at IBM" card and an "IBM PartnerSuccess360 (PS360)" card. A "Co-Marketing" card is also visible. The bottom right corner features a blue chat icon.

Your Opportunities

Once you enter the IBM Partner Portal all your opportunities will be displayed in the Deals tab.

In the left menu you could see the different list views:

- **Business Partner All Opportunities:** opportunities created by your company
- **Business Partner Open Opportunities:** opportunities created by your company that are with open status
- **Expired Opportunities**
- **Shared by IBM Opportunities:** opportunities that you have accepted from IBM
- **Hardware Opportunities:** opportunities flagged for Infrastructure
- **Software Opportunities:** opportunities flagged for Software
- **Opportunity view for Distributors:** only available for you preferred distributors (**Your distributors will be able to see your opportunities**)
- **Opportunities expiring in next 2 weeks:** filter your deals
- **Recently Created**
- **Recently viewed**

home

Deals

Deal Management

Deal registration

Deal registration review

Opportunities

Client interest

Quotes

Partner guided selling (software)

Get ready for a faster start in 2024. Validate or assign the Renewal Focal role in your Company profile by January 15th.

One place for all your needs

Register deals, monitor incentives, track expertise, and grow your partnership with IBM.

Search by tool name or description

Administration Benefits Collaboration Coming Soon Deal Management Deals Education Marketing Quotes Service Support

All Tools

Opportunities

Saved Filters

Opportunity Name	Opportunity Number	Deal Registration Expiry Date	Customer Name	BP Estimated Sales Value	Created Date
test - Hardware	0063h00000LXZW8AAP	2024/01/21	PT MATAHARI DEPARTMENT STORE TBK	USD 1.00	2023/07/25

Items per page 10 1-1 of 1 items

Hi! I'm a virtual assistant. How can I help you today?

Register Deal (included opportunity creation)

In Partner Portal, **Opportunity Creation and Request Deal** was unified, as well as **Systems Deal Registration and Software Special Bid Protection**. All is consolidated in one unique process and rebranded for Deal Registration, regardless the brand you're using.

To register a deal, follow these steps:

1. Enter: <https://partnerportal.ibm.com/>
2. Click over Deal Registration
3. Fill in with:
 - **Are you registering this solution on behalf of a reseller?** Click No to select the company your ID is tied to. Click Yes if you need to search a partner in IBM directory
 - **Solution Name**
 - **Solution Description** (A very important field. Must have all the details of the transaction as it will be used in case of Deal Registration Review).

***Limit of 250 characters.**
4. Click over Search for Customer

Home
Deals
Deal Management
Deal registration
Deal registration review
Opportunities
Client interest
Quotes
Partner guided selling (software)

Incentives
Learning and education
Benefits
Company management
Insights and reports
Partner support

Register deal

Tell us about the deal you'd like to register.

Tell us about your solution

* Are you registering this solution on behalf of a reseller?
 Yes
 No

* Solution name

* Solution description

* Customer
[Search for customer](#)

* Currency
USD (U.S. Dollar)

* Estimated close date

This solution is restricted
 This solution was provided by your distributor

Cancel Next

Search for Customer Field

To select your customer, you can choose three options of search

- **CMR Number***
- **Customer Name**
- **Customer Site ID**

Each option will personalize the fields to be filled in.

Click over the search button and it will give you a list of clients with those names.

Please select the correct customer. Verify the information provided like CMR number, Street Address, City and Zip Code. In case you need to change the customer, just go in the “search for customer” button and select a different client.

If you can’t find your customer in this tool, you will need to interact with an IBMer to create your customer in CMR.

*US Systems BPs can continue using the BP@EU CMR. There is a conversion table that will automatically show both CMR’s – Direct End User CMR and BP@EU CMR. Regardless the number is included in the platform.

Example: 9405632 (1195295)

Direct End User CMR BP@EU CMR

The screenshot shows the 'Customer Search' interface in three stages:

- Step 1:** The search criteria are set to 'CMR Number'. The 'Country' dropdown is set to 'Canada'. A 'Search' button is visible.
- Step 2:** The search criteria are changed to 'Customer Name & Address'. Fields for 'Country' (Canada), 'Customer Name' (Bank), 'City', 'State/Province', and 'Post/Zip Code' are visible. A 'Search' button is highlighted.
- Step 3:** Search results are displayed for 288 matching customers. A table lists customer details, with the first row selected:

Customer Name	CMR Number	Street Address	City	Post/Zip Code
TANGERINE BANK	788753	3389 STEELES AVE E	TORONTO	M2H 3S8
B2B BANK	085375	199 BAY ST SUITE 600	TORONTO	M5L 0A2
TANGERINE BANK	968800	5300 86TH AVE SE	CALGARY	T2C 4L7
ZAG BANK	096626	6807 RAILWAY ST SE SUITE 1...	CALGARY	T2H 2V6
HOMEQUITY BANK	071622	1881 YONGE ST SUITE 300	TORONTO	M4S 3C4

Below the table, the 'Selected customer details' for TANGERINE BANK are shown:

- Customer Name: TANGERINE BANK
- Address: 3389 STEELES AVE E, TORONTO, M2H 3S8
- Country: CA
- CMR Number: 788753
- Government Owned Entity: No

Multiple CMRs for hardware opportunities in US ONLY

For IBM Partner Portal **hardware** opportunities that are located within the United States and its territories (American Samoa, Commonwealth of Northern Mariana Islands, Guam, Puerto Rico and U.S. Virgin Islands).

For US Deal Registrations to work in ePricer, the approved deal registration in Partner Portal must show two CMRs (customer numbers):



Country: ▼ US
CMR Number:

- **CMR 1000000** is the Direct CMR number also known as the Sold to CMR.
- **CMR (0000001) is the install at CMR** is an IBM CMR number that includes identification/link to a Tier 2 Business Partner's Distributor or Tier 1 Business Partner. This is also known as the 'Install at' CMR related to the same end user. It is unique to the Tier 2 Business Partner's Distributor or to the Tier 1 Business Partner. This customer number may also be known as the BP @ end user CMR

Partner Portal will show the IBM Direct (sold to) CMR when you search for an end user.

IBM Business Partners (BP) can submit a registration referencing the currently known IBM CMR number (install at/BP@EU), and Partner Portal will search and identify the corresponding IBM Direct CMR.

If the **'install at/BP@EU'** CMR does not auto-populate, the BP should search for a customer number by entering the customer's name. Partner Portal will return valid IBM Direct (sold to) CMRs. The BP should proceed entering the opportunity in Partner Portal with an IBM Direct (sold to) CMR. If Partner Portal identifies a corresponding 'install at/BP@EU' CMR to the IBM Direct (sold to) CMR, the system will auto-populate.

If **no 'install at/BP@EU'** CMR is identified after the BP has entered the opportunity in Partner Portal using the IBM Direct (sold to) CMR, IBM will generate and associate the 'install at/BP@EU' CMR in the opportunity number within 24 business hours.

If the 'install at/BP@EU' CMR has not been associated to the IBM Direct (sold to) CMR in the opportunity number within the 24 business hours, the BP is to submit a help ticket to the Partner Support Desk at <https://www.ibm.com/partnerplus/support> stating the opportunity number is only showing the one IBM Direct (sold to) CMR. Updates cannot be submitted for the IBM Direct (sold to) CMR.

If the incorrect 'install at/BP@EU' CMR was applied (i.e. a maintenance CMR, a US Distributor CMR vs Business Partner CMR), the BP should send an email to: STGREG@ca.ibm.com with the subject - CMR update required. Include in the email the opportunity number and the new 'install at/BP@EU' CMR that should be associated. The request will be processed within 24 business hours.

Continue Registering a Deal


After you select the customer, choose the currency you are using and define a date that you think this deal will be closed.

We suggest to add your deal in dollars due to conversion rate.


*In this page you also have a box to click if you need this solution to be restricted. The restriction need to be decided at the submission phase, you can't change the restriction of a deal after is submitted.


** Another box to click is related to help track Co-Marketing activities, you should check if this deal was provided by your distributor.


* Opportunity currency

Select Currency 

* Estimated Close Date



This Solution is Restricted 

This solution was provided by your distributor 

Continue Registering a Deal

Answer the next three questions:

- **Is this a public tender?** If yes, it will open new fields. Please provide the name of Public tender and a reference number. If you still does not have the number yet, you can give more information on this tender in words, it's ok, no need to be numbers only.
- **Is IBM exclusively?** Yes or No only.
- **Activities you have performed.** You must select **at least two of the six** sales and marketing activities, otherwise the **deal registration will not be approved**. If you have forgotten to correctly select the activities and submit your DR, you can go to page 22 to understand how to make an edition of this field.

Register deal

Tell us about the deal you'd like to register.

Tell us about your solution

* Is this solution responding to Public Tender, Request for proposal (RFP) or Request for quotation (RFQ)?

Yes

No

* Are you selling IBM products exclusively for this solution?

Yes

No

Select the activities you've completed with your customer

To receive Deal Registration, you must select at least 2 activities you have performed with your customer.

Analysis of customer's requirements, two-way communication demonstrating understanding of customer's project scope and technology needs.

Technical or architectural study/diagram, specific to customer requirements.

Product demonstrations or presentations showing product recommendation specific to customer requirements, shared with customer.

Formal Proposal or proof of concept.

Dedicated support team for customer solution, which may include implementation plan and training.

Proposed Statement of Work including description of services.

[Back](#)

[Cancel](#)

[Next](#)

Continue Registering a Deal

Select all the products to be sold in this solution.

This search will also show you what is the product group and how many products are associated to this group. For example: If you select Worker Insights, it will show you the number BSP108, the participant group Software as a Service and that there are 50 product associated to this selection.


***Important: Use the Part Number or Type and Model** of the product/s you want in the search field, to make sure your company will have the correct Deal Registration. It's very important that you select **the correct product that belong to a specific Deal Registration product Group.**

At the moment you will request a quote in ePricer/Partner Guide Selling, the system will check that you have an approved deal registration for the products you upload in the configuration.

If you have doubts, you can check the [Deal Registration Product Group](#) information. Also, you could find this information in the link below the product search field when you are registering the deal.

Select your products

What products are you selling to **Deutsche Bank AG?**

 BPHWST008 - SAN Switches and Controllers
Storage • 223 associated products

Learn more about [IBM product offerings](#) and [eligibility criteria](#)

Continue Registering a Deal

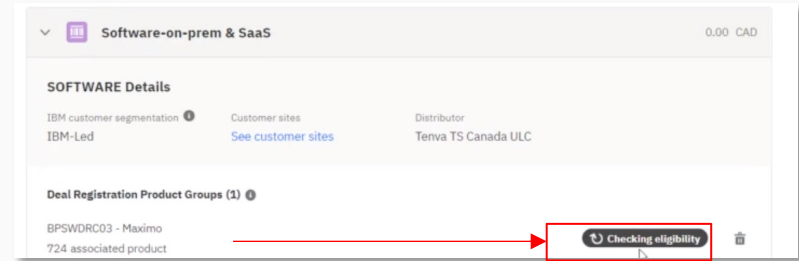
The system will show you if you're authorised to this registration or not.

The **approved** message (in green box) appears when the system doesn't find any duplicity in the customer and deal registration product group.

The **not approved** message are due to the following situations:

- Other BP already has this deal registration.
 - You missed to select at least two activities (from a list of 6 options) with your client in the previous page. You could click on the **“Back”** Button and correct the selection of the sales activities.
- If you decide to continue with the registration without this correction, your deal registration will be submitted but will remain unapproved.

*TLS Maintenance products will not show up in the search as those deals does not require a deal registration to be sold to clients.



Deal registration approved

Deal registration not approved

Another business partner has already secured a deal registration.

Deal registration not approved

You must demonstrate that you've completed at least two of the activities listed on the previous page to have your Deal Registration approved.






Continue Registering a Deal

You can add multiple brands to the same deal registration, just go back to the search of products and select all that apply. The system will add boxes of information one below the other.

You will need to inform how much do you think will be the value of this deal and click Next.

Select your products

What products are you selling to **Deutsche Bank AG**?

-  **BSP018 - Cognos Analytics on Cloud**
Software as a Service • 112 associated products
-  **BSP094 - Cognos Disclosure Management on Cloud**
Software as a Service • 23 associated products
-  **BSP107 - SPM: Incentive Compensation Management SaaS**
Software as a Service • 0 associated products
-  **BSP133 - Cognos Controller on Cloud**
Software as a Service • 0 associated products
-  **BSPWDR128 - Cloud Pak for Data DS & AI Extensions**
Software • 20 associated products

[Learn more about IBM product offerings and eligibility criteria](#)

Software-on-prem & SaaS 0.00 USD

Software-on-prem & SaaS Details

Customer sites

[See customer sites](#)

Distributor

TD SYNEX Germany GmbH & Co.OHG

Deal Registration Product Groups (2)

BSP049 - Operations Optimization (SaaS)
47 associated products

Deal registration approved



BSP018 - Cognos Analytics on Cloud
112 associated products

Deal registration approved



* Estimated Sales Value USD

Hardware 0.00 USD

Power Systems Details

* Distributor

TD SYNEX Germany GmbH & Co.OHG

[Change distributor](#)

Deal Registration Product Groups (1)

BPHWP002 - Power Scaleout
20 associated products

Deal registration approved



* Estimated Sales Value USD

Total Solution Value:

0.00 USD

[Back](#) [Cancel](#)

[Next](#)

Continue Registering a Deal

This is the confirmation screen where you will review all before submission.

Check if you chose the right customer, the right products, the right amount and go for it. “Confirm Solution”. Will open a pop up with the amount of days that this deal will be active and the expiration date.

With this process the new expiration time is standard worldwide: **180 days for Software and Infrastructure.**

When you click “Confirm Solution” your deal registration will be submitted. In case you have software and hardware product groups the system will **create 2 separated opportunities.**

Also, remember that **this process include both actions: Registered the Deal and Created the Opportunity** based on the data you informed.

There is no need to do any other step.

Review your solution

Solution

Solution name	Solution description	
LA Team Deal Registration Example	be descriptive!	

Customer Details

Customer name	Customer address	Customer Country
TANGERINE BANK	3389 STEELES AVE E	CA
CMR Number	Government Owned Entity	
788753	No	

> **Software-on-prem & SaaS** 5,000.00 CAD

> **Hardware** 5,000.00 CAD

Total Solution Value: 10,000.00 CAD

Back Cancel **Confirm solution**

Confirm solution

Number of opportunities created: 2

Software Deal Registration Expiry Date	Hardware Deal Registration Expiry Date
Days Valid: 180	Days Valid: 180
End Date: 10/21/2023	End Date: 10/21/2023

Cancel **Confirm solution**

Overview of your Deal Registration

When you finish the registration, the system will open the solution details, with the opportunity number with the **18 characters***.

Click over the opportunity to see details.

There are some new functionalities.

- **Find an IBM Seller:** Based on the solution the system will also pull IBM sellers that can help you with doubts
- **Request Quote:** Redirection to the quotation tools that you already use (ePricer for Infrastructure and PGS for Software).
- **Chatter:** Field for comments where you can @someperson and he/she will receive your message (by an email notification)

* The official number is 18 characters but if you use the first 15 characters also drive to your opportunity. Some tools (example PGS) have number limitation.

The screenshot displays the IBM Deal Registration system interface. At the top, the solution details for "LA Team Deal Registration Example" are shown, including the owner (Quote PRM BP User), creation date (10/27/2021, 8:30 AM), and last modified date (10/27/2021, 8:30 AM). Below this is a table of opportunities, with the first row highlighted in red. The table columns are Opportunity name, Opportunity number, Customer, Close date, and Estimated Sales Value.

Opportunity name	Opportunity number	Customer	Close date	Estimated Sales Value
LA Team Deal Registration Example ...	00605000005T0DPAAG	TANGERINE BANK	2021-10-29	5,000.00
LA Team Deal Registration Example ...	00605000005T0DQAAG	TANGERINE BANK	2021-10-29	5,000.00

The detailed view of the opportunity "LA Team Deal Registration Example - Software" is shown below. It includes fields for Customer Name (TANGERINE BANK), Solution (LA Team Deal Registration Example), Opportunity Owner (Quote PRM BP User), Deal Registration Expiry Date (7/24/2022), and Estimated Sales Value (CAD 5,000.00 (USD 3,333.35)). There are buttons for "Find an IBM Seller for support" and "Request Quote".

The "Find an IBM Seller for support" overlay shows a search for IBM contacts based on the account name and products included in the opportunity. It lists 20 results, including Constance (Connie) Donohue, Karim Sonbi, and Glenn Baker.

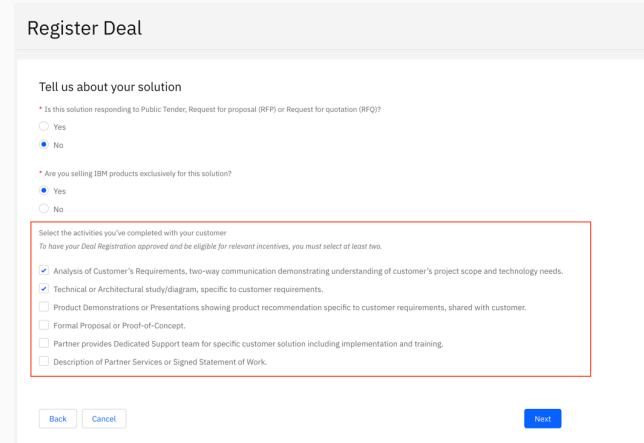
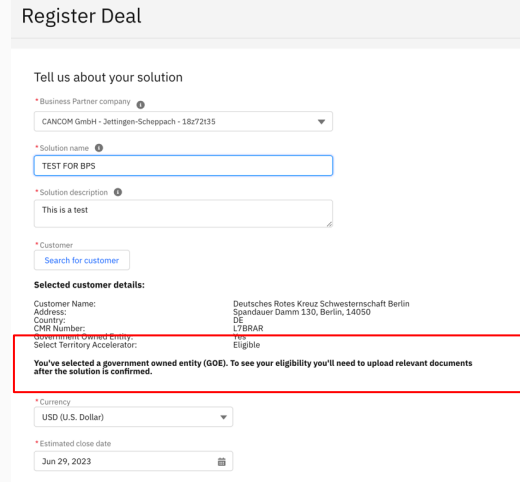
The "Chatter" overlay shows a text input field with the text "@(Fabio (Fabio) Pantalone)" and a "Share" button.

Register a Deal for GOE end user (included opportunity creation)

To register a GOE deal, follow these steps:

1. Enter: <https://partnerportal.ibm.com/>
2. Click over Register Deal
3. Fill in with:
 - Are you registering this solution on behalf of a reseller? Click No to select the company your ID is tied to. Click Yes if you need to search a partner in IBM directory
 - Solution Name
 - Solution Description (this must have details as it will be used in case of Deal Registration Review).

***Limit of 250 characters.**
4. Click over Search for Customer
5. In the case the customer is flag as a GOE (Governed Own Entity), you need to upload GOE supporting documentation once you finish the creation of the solution. In this step the system will show you a wording to remind you that this action must be performed.
6. Answer solution questions. Remember to select two of the six sales and marketing activities that Partner Portal show to you, otherwise your deal registration will not be approved.



Register a Deal for GOE end user (included opportunity creation)

7. Select all the products to be sold in your solution. **At this point, the deal registration is not approved yet.**

8. Once you finished the registration, you must upload the GOE supporting documentation with the “Upload GOE documentation” blue button.

9. In addition, you could also upload the GOE documentation from the button inside the opportunity.

The screenshot displays the IBM Partner Plus interface for deal registration. It is divided into three main sections:

- Top Section: Product Selection**
 - Header: "Select your products"
 - Text: "What products are you selling to: Deutsches Rotes Kreuz Schweisternschaft Berlin?"
 - Search bar: "Search by part number, machine type model, PFD, UT level 30 or deal registration group."
 - Link: "Learn more about IBM product offerings & #160;and eligibility criteria"
 - Product Category: "Hardware" (10,000.00 USD)
 - Section: "Power Systems Details"
 - Distributor: TD SYNEX Germany GmbH & Co.OHG (Change distributor)
 - Section: "Deal Registration Product Groups (1)"
 - Item: BPHWP002 - Power Scaleout (20 associated products)
 - Status: "Deal registration not approved" (with trash icon)
 - Message: "To see your eligibility you'll need to upload relevant documents after the solution is confirmed."
 - Estimated Sales Value: 10,000.00 USD
- Middle Section: Solution Overview**
 - Header: "Solution TEST FOR BPS"
 - Description: "This is a test"
 - Owner: Toni Abad
 - Created by: Toni Abad, 4/24/2023, 4:30 PM
 - Last modified by: Toni Abad, 4/24/2023, 4:30 PM
 - Restricted:
 - Table with columns: Opportunity name, Opportunity number, Customer, Close date, Estimated Sales Value.
 - Row: TEST FOR BPS - Hardware, 004650000AwdPRAAJ, Deutsches Rotes Kreuz Schweisternschaft Ber..., 2023-06-29, 10,000.00
 - Message: "Upload relevant documents to see your eligibility. You can always come back and do this later by navigating to the opportunity or solution page."
 - Button: "Upload GOE document"
- Bottom Section: Deal Registrations**
 - Customer Country: Germany
 - Section: "Deal Registrations (1)"
 - Table with columns: Deal Registration Name, Product Platform, Deal Registration Approved?
 - Row: BPHWP002 - Power Scaleout, POWERSYS,
 - Button: "View All"
 - Button: "Add Deal Registration Product Groups"

Register a Deal for GOE end user (included opportunity creation)

10. In case you missed to upload the documentation at the moment of the registration or the submission, you could open the Deal Registration review section, select the case number of the GOE deal registration and upload the documentation in the **“Add a file”** button.

10. IBM will make all reasonable efforts to respond to requests for Deal Registration Review within approximately 72 hours. You could review the status of your deal registration in the Opportunity in the Deal Registration Section.

The screenshot shows the 'Cases Recently Viewed' section of the IBM Partner Portal. A table lists three cases. The first case, with ID 00012508 and subject 'GOE Documentation Review', is highlighted with a red box. The table columns are Case Num..., Subject, Status, Date/Time Opened, and Case Owner Alias. Below the table, a message states 'You haven't viewed any Cases recently.'

Case Num...	Subject	Status	Date/Time Opened	Case Owner Alias
00012508	GOE Documentation Review	Submitted	17/09/2023, 17:06	GOE Documentation Review
00012530	BPSWDR26 - Safer Payments	Submitted	20/09/2023, 01:35	PRM DRR NA - First line review
00012137	BPSWDR75 - Data Protection	Submitted	06/09/2023, 01:35	PRM DRR NA - First line review

The screenshot shows the details page for a 'Case GOE Documentation Review'. The 'Files' section on the right is highlighted with a red box, showing a file named 'Screenshot-2023-09-17-220916.png' with a size of 28 KB and a date of 9/17/2023. An 'Add a file' button is visible next to the file list.

Details

- Solution: Great Storage Solution
- Subject: GOE Documentation Review
- Status: Submitted
- Description: Great Storage Solution - GOE Documentation Review
- IBM Decision Note

General Comments

Your preferred distributor is automatically selected by your profile in Partner Plus and will show in your Deal Registration. **Also, this distributor will be able to see all your deal registrations.**

Now the opportunity number from IBM Partner Portal is the same that will show in ISC internal management tool. It is a number of 18 digits (same as ISC internal number).

Will be available in a further Release:

- Ability to edit or change information sent in the deal registration that is approved. In case there is an error until this is implemented, you will need to delete and create a new opportunity.
- For now, the system does not send a message to BPs with the opportunities that are going to expire, but there is a list view to see only expiring opportunities in the Opportunities Menu.

Hardware 0.00 CAD

STORAGE Details

IBM customer segmentation ⓘ New IBM Customer ⓘ
Industry YES

Distributor
Terva TS Canada ULC

Deal Registration Product Groups (1) ⓘ

BPHWST004 - Modern Data Protection
51 associated product

Deal registration approved

* Estimated Sales Value CAD

Opportunities

Saved Filters

Q

Opportunity Name	Opportunity Number	Deal Registration Expiry Date	Customer Name	BP Estimated Sales Value	Created Date
test - Hardware	0063h00000LXZWBAP	2024/01/21	PT MATAHARI DEPARTMENT STORE TBK	USD 1.00	2023/07/25

Open
All
Expired
Hardware
Shared by IBM
Expiring
Opportunity view for Distrib...
Recently created
Recently viewed
Restricted
Software

General Comments

In case you did not select at least two sales and marketing activities in your opportunity at the moment of creation, your Deal Registration Status will be “Not Checked”, and you could not use for Vale Seller Preferred Price, Special Price or to earn your sales incentives.

If you want to edit and correct the sales activities, please follow the next steps:

1. Open your Opportunities list and search the one that you need to edit.

Opportunity Name	Customer Name	Est. Estimated Sales Value	Created Date
TEST - Hardware	TSB BANK PLC	USD 45,000.00	2024/04/11
TEST - Software	TSB BANK PLC	USD 30,000.00	2024/04/11
TEST - Software	TSB BANK PLC	USD 50,000.00	2024/04/17
TEST TD - Hardware	TSB BANK PLC	USD 45,000.00	2024/04/14

2. Inside the opportunity go to the **Solution** field and click in the blue solution name.

Details	Related Information	Incentives
General		
Opportunity Name	TEST - Hardware	Created By: IBM Business Partner, 4/11/2024, 12:31 PM
Opportunity Number	00040000071504AP	Last Modified By: IBM Business Partner, 4/11/2024, 12:31 PM
Class Date	5/30/2024	Opportunity Currency: USD - US S. Dollar
Business Unit	Ariva Enterprise Computing Solutions Ltd	BP Estimated Sales Value: USD 60,000.00
Country	GB	Revenue Project: IBM.PW - GENA - UK
Region	EMEA	Opportunity Legacy ID: 00040000071504AP
Solution	TEST	Account Reference ID: TSB BANKING GROUP PLC-GB
Account Reference ID	TSB BANKING GROUP PLC-GB	Line Category
Line Category		

3. Edit the Required activities section and select the activities that you forgot to complete when you created the opportunity.

Required activities

- Analysis of Customer's Requirements, two-way communication demonstrating understanding of customer's project scope and technology needs.
- Technical or Architectural study/diagram, specific to customer requirements.

Opportunity name	Opportunity number	Customer	Close date	Estimated Sales Value
TEST - Software	00040000071504AP	TSB BANK PLC	2024-05-30	30,000
TEST - Hardware	00040000071504AP	TSB BANK PLC	2024-05-30	60,000

4. Select the activity/ies that you performed with your end user and click the “Add” button.

Add activities

To get your deal registration approved, you must select at least 2 activities you intend to complete within this deal. If another partner asks for a deal registration review, IBM will request documentation that demonstrates your work on at least 2 of the 6 listed activities for this opportunity. Activities can't be removed once they've been added. You can review your deal registration approval status on the Opportunity page under Deal registration product groups.

- Analysis of customer's requirements, two-way communication demonstrating understanding of customer's project scope and technology needs.
- Technical or architectural study/diagram, specific to customer requirements.
- Product demonstrations or presentations showing product recommendation specific to customer requirements, shared with customer.
- Formal Proposal or proof of concept.
- Dedicated support team for customer solution, which may include implementation plan and training.
- Approved Statement of Work including description of services.

Cancel Add

IMPORTANT: If you did not select any activities when you created the opportunity and now you are doing and update of this information, the system will run the duplication check process and your DR will be updated. If your DR registration is not approved, you may request a Deal registration review. If you are only updating the activities that you selected when you created the opportunity, the system will only reflect this action and do not change the status of your current DR.

Opportunities assigned by IBM

NEW: When you accept a deal from IBM you do not need to create the registration anymore.

Just select at least two sales activities, accept and you're done.

The process will be:

1. Your PRC and OM Focal will receive an e-mail.
2. Clicking in the link from the e-mail or in the main menu → select Opportunities
3. Select the drop down “Shared by IBM”
4. Select the opportunity you want to accept and, in the details, will show you a section to select the sales activities and if you scroll down, you will see the “Accept or Reject” buttons.
5. If you select reject, you will need to say why.
6. If you accept, the system will automatically register a deal for you.
7. You have **2 workdays** to accept or reject the opportunities. (auto deal share process)
8. For GOE assigned opportunities, you need to send the supporting documentation to prove the engagement with the end user.

The screenshot shows the IBM Partner Plus interface. On the left is a navigation menu with options like Deal Management, Deal registration, Client interest, and Incentives. The main area is titled 'Opportunities' and shows a list of opportunities with a filter dropdown set to 'Shared by IBM'. Below the list, there's a section for 'Review your passed solution' for a specific opportunity. This section includes details about the solution name, description, and customer information. A red box highlights a section where users must select at least two sales activities to complete the opportunity. Below this, there are sections for 'SaaS Details' and 'Deal Registration Product Groups'. At the bottom, there are buttons for 'Reject Solution' and 'Accept Solution', with the 'Accept Solution' button highlighted by a red box.

Review your passed solution

Solution

Solution name	Solution description	Created by
Test Clone - Infraestructura Almacenamiento imagenes		Fabio Schiattarella
Accept by	Estimated close date	
2023-06-09	2023-06-30	

Customer Details

Customer name	Customer address	Customer Country
FCA FIAT CHRYSLER AUTOMOVEIS BRASIL LTDA.	AV CONTORNO 3455 PAULO CAMILO, BETIM, MG, 32669-900, Brazil	BR
CMR Number	Government Owned Entity	Select Territory Accelerator Eligible
286466	No	
Contact Name	Contact Email	Contact Phone
JUAN JOSE LERIA PEREZ	juanjose.leria@inetum.com	

Select at least two activities you intend to complete as you engage on this opportunity. IBM has identified you for this registered opportunity. If another partner asks for a “Deal Registration Review,” IBM will request documentation from you showing your work on the six listed criteria for this opportunity.

- Analysis of customer’s requirements, two-way communication demonstrating understanding of customer’s project scope and technology needs.
- Technical or architectural study/diagram, specific to customer requirements.
- Product demonstrations or presentations showing product recommendation specific to customer requirements, shared with customer.
- Formal Proposal or proof of concept.
- Partner provides dedicated support team for specific customer solution including implementation and training.
- Description of partner services or signed statement of Work.

Software-on-prem & SaaS EUR

SaaS Details

Customer sites [See customer sites](#) Distributor **IBM TEST BR BP GJI DUMMY**

Deal Registration Product Groups (1)

BPHWPW02 - Power Scaleout Deal registration not approved

You must indicate that you've completed at least two engagement activities to have your Deal Registration approved.

* Estimated Sales Value 0.00 EUR

Total Solution Value: 4.00 EUR

[Reject Solution](#) [Accept Solution](#)

Deal Registration Review

If you tried to register a deal and was not approved you can either try again once you have the criteria (ex. certifications) or in case you think there is another partner that has this deal, but you are working with this client, you can request a “Deal Registration Review” (previous known as Investment Review)

1. Enter your opportunities
2. Click on the deal you need a review
3. Scroll down to the Deal Registration information
4. You will see that in the approved box you will not have it checked
5. Click on the product name in blue
6. On the detailed page, click on the button on top right corner **“Request Deal Registration Review”**
7. Fill in the field requested with your Business Justification of why you need this review to be made and mention what types of initiatives have been made with this client by your company.
8. Add files with the **evidence of the sales activities** that you select in the deal registration (ppt, excel, jpeg...)

Opportunity name	Opportunity number	Customer	Close date	Estimated Sales Value
LA Team Deal Registration Example ...	00650000025T0CPBAG	TANGERINE BANK	2021-10-29	5,000.00
LA Team Deal Registration Example ...	00650000001T00QJAB	TANGERINE BANK	2021-10-29	5,000.00

Deal Registration Name	Product Platform	Deal Registration Approved?
BSP298 - Object Storage (Public Cloud) - No Incentives	SAAS	<input type="checkbox"/>

[View All](#)

Request Deal Registration Review

If you don't agree with our decision to not approve your Deal Registration you can request a review. Using the business justification box, please explain why it should be approved and attach any relevant documents that show you have an existing relationship with the customer.

Which Deal Registration Product Group will be included in this review?

BSP298 - Object Storage (Public Cloud) - No Incentives

* Business justification

TEST

Request Deal Registration Review

Use the files section to upload supporting documents. If you don't have them, you can submit your Deal Registration Review and upload them later.

Required documents
You'll need to upload documents that show two marketing or sales activities have taken place, and one selected industry vertical solution, if applicable, from the following list:

Marketing or sales activities

- Requirements analysis meeting
- Technical or architectural diagram, product demonstrations or presentations
- Training or briefing session

Industry vertical solutions

- A signed statement of work
- Implantation plan
- IBM trial, IBM proof of concept (POC) or opportunity-related loaner

Deal Registration Review name
BSP301 - Red Hat Open Shift (Public Cloud) - No Incentives

Upload up to 10 files at a time. Each file must not exceed 20MB. In any of these formats: bmp, csv, doc, docx, eml, gif, jpeg, jpg, msg, odt, ods, odt, pdf, png, pptx, txt, xls, and xlsx.

or Drop Files

Cases (Deal Registration Review)

In case you missed to upload the documentation at the moment of the <deal Registration Review, you could open the Deal Registration review section, select the case number and upload the documentation in the **“Add a file”** button.

Once you submit a request the system assign a case number and will be send to the subject matter expert for the analysis.

The SME will post the decision made in the portal. If it's taking more time than you need, you can use the feed to include a comment or mark @ and ask for help.

If you want to check status of your request, you will need to enter the opportunity, click on the deal registration group that does not have the approval and see the details in the Cases section.

The screenshot displays the IBM Deal Registration Review interface. On the left, a sidebar menu includes 'Home', 'Deals', 'Deal Management', 'Deal registration', 'Deal registration review' (highlighted), 'Opportunities', 'Client interest', and 'Quotes'. The main area shows a 'Cases Recently Viewed' section with a table of 4 items. The first item, '00013466 BSP301 - Red Hat Open Shift (Public Cloud)', is highlighted with a red box. Below this, the details for case 'BSP301 - Red Hat Open Shift (Public Cloud) - No Incentives' are shown, including a 'Files' section with an 'Add a file' button. The bottom part of the screenshot shows a 'Deal Registration' summary for 'BPHWST001 - Container (Hardware)', with a 'Cases (1)' section containing a table of case details.

Case Num...	Subject	Status	Date/Time Opened	Case Owner Alias
00013466	BSP301 - Red Hat Open Shift (Public Cloud)	Submitted	30/01/2024, 21:57	PRM DRR EMEA - First line review
00012830	BPSWDR26 - Safer Payments	Submitted	20/09/2023, 01:35	PRM DRR NA - First line review
00012508	GOE Documentation Review	Submitted	17/09/2023, 17:06	GOE Documentation Review
00012137	BPSWDRCT5 - Data Protection	Submitted	06/09/2023, 01:35	PRM DRR NA - First line review

Case Number	Date/Time Opened	Status
00002360	9/19/2022, 12:27 PM	Submitted

Incentive management

You can also check available incentives and your eligibility by clicking over the opportunity and selecting incentives.

This will open a list of incentives that are available and will personalize with your eligibility and potential earnings.

Details about the Sales Incentives please check the 2024 IBM Partner Plus Program Guide [page](#).

Status of Eligibility:

- **Not Eligible** – click in the incentive name to review what you need to receive the incentive.
- **Eligible**

Solution

LA Team Deal Registration Example

Solution description
be descriptive!

Owner: Quote PRM BP User | Created by: Quote PRM BP User, 10/27/2021, 8:30 AM | Last modified by: Quote PRM BP User, 10/27/2021, 8:30 AM

Opportunity name	Opportunity number	Customer	Close date	Estimated Sales Value
LA Team Deal Registration Example ...	00605000005TODPAAG	TANGERINE BANK	2021-10-29	5,000.00
LA Team Deal Registration Example ...	00605000005TODPAAG	TANGERINE BANK	2021-10-29	5,000.00

Opportunity: LA Team Deal Registration Example - Software

Customer Name: TANGERINE BANK | Solution: LA Team Deal Registration Example | Opportunity Owner: Quote PRM BP User | Deal Registration Expiry Date: 7/24/2022 | Estimated Sales Value: CAD 5,000.00 (USD 3,333.35)

Details | Related Information | **Incentives** | Chatter

General

Opportunity Name: LA Team Deal Registration Example - Software
 Opportunity Number: 00605000005TODPAAG
 Close Date: 10/29/2021
 Distributor: Tervia TS Canada ULC
 Restricted:
 Stage:

Created By: Quote PRM BP User, 10/27/2021, 8:30 AM
 Last Modified By: Quote PRM BP User, 10/27/2021, 8:31 AM
 Opportunity Currency: CAD - Canadian Dollar
 Estimated Sales Value: CAD 5,000.00 (USD 3,333.35)
 Business Partner: Sirius Computer Solutions, Inc.
 Opportunity Legacy Id:

Post
 Share an update...

Sort by: Most Recent Act | Search th...

Details | Related Information | **Incentives**

There are three types of incentives that reward you for selling IBM products: Base Sales Incentive, Select Territory Accelerator, and Proficiency Incentive.

To be eligible for Base Sales Incentive, you'll need to be the first partner to register the deal and have it approved. Select Territory Accelerator and Proficiency Incentive have additional requirements.

Incentive earnings are based on requirements being met at the time of order not when the opportunity was approved. For more information on incentives and requirements, [check the 2023 IBM Partner Plus Sales Incentive Program Guide for Business Partners](#).

Incentives (3)

Incentive - Deal Registration Name	Product Platform	Eligibility
Base Sales Incentive - BPHWPW004 Power Enterprise Linux Hardware	POWERSYS	Eligible
Proficiency Incentive - BPHWPW004 Power Enterprise Linux Hardware	POWERSYS	Eligible
Select Territory Accelerator - BPHWPW004 Power Enterprise Linux Hardware	POWERSYS	Eligible

[View All](#)

Claiming Incentives

Keep in mind that to claim these incentives you need to interact with your distributor and ask them to include the opportunity number and solution ID (for the engagement incentive) in the sales order.

Lear more in the [2024 IBM Partner Plus Sales Incentive Program Guide for Business Partners](#)



Sales Stages

When you enter your opportunity in the general tab you will be able to see the stage, as the print screen on the right.

Also, the status names of all deals will be according to what was already used by ISC (internally), which is:

- Engage
- Qualify
- Propose
- Negotiate
- Won
- Lost

The screenshot displays the IBM Partner Portal interface for an opportunity. The main header shows the opportunity name 'LA Tech Data Call 80 Characters - Software' and buttons for 'Find an IBM Seller for support' and 'Request Quote'. Below this, key information is listed: Customer Name (THE TORONTO-DOMINION BANK), Solution (LA Tech Data Call 80 Characters), Opportunity Owner (Quote PRM BP User 14), and Deal Registration Expiry Date (8/1/2022). The 'Details' tab is selected, showing a 'General' section with fields for Opportunity Name, Opportunity Number, Close Date, Distributor, Restricted, Stage (highlighted with a red box and showing 'Engage'), Created By, Last Modified By, Opportunity Currency, Estimated Sales Value, Business Partner, Opportunity Legacy Id, and Account Name. A 'Chatter' section is also visible on the right side of the page.

Filtering opportunities

You can search all your opportunities by groups and/or filtering the columns.

Groups:

- **Business Partner All Opportunities:** opportunities created by your company
- **Business Partner Open Opportunities:** opportunities created by your company that are with open status
- **Expired Opportunities**
- **Shared by IBM Opportunities:** opportunities that you have accepted from IBM
- **Hardware Opportunities:** opportunities flagged for Infrastructure
- **Software Opportunities:** opportunities flagged for Software
- **Opportunity view for Distributors:** only available for you preferred distributors (**Your distributors will be able to see your opportunities**)
- **Opportunities expiring in next 2 weeks:** filter your deals
- **Recently Created**
- **Recently viewed**

Columns:

- Opportunity Name
- Opportunity Number
- Deal Registration Expiry Date
- Customer Name
- Estimated Sales Value
- Created Date

Opportunity Name	Opportunity Number	Deal Registration Expiry Date	Customer Name	BP Estimated Sales Value	Created Date
test - Hardware	0063h00000LXZW8AAP	2024/01/21	PT MATAHARI DEPARTMENT STORE TBK	USD 1.00	2023/07/25

Opportunity Name	Opportunity Number	Deal Registration Expiry Date	Customer Name	BP Estimated Sales Value	Created Date
test - Hardware	0063h00000LXZW8AAP	2024/01/21	PT MATAHARI DEPARTMENT STORE TBK	USD 1.00	2023/07/25

Reports of opportunities

IBM Partner Portal has a tab specific for reporting.

Keep in mind there are different alternatives of information to get in a report:

- Deal Registration Review Cases
- Business Partners Opportunities
- Business Partners Deal Registration

These have variations, example above information personalized by “Created by me”.

Reports contain all data that you have access to – meaning you can review and export all data you need with just a few clicks

Exporting reports can be done as a formatted file or a raw data file.

REPORT
All Business Partner Opportunities

This report has more results than we can show (up to 2,000 rows). Summary information is calculated from full report results.

Total Records
3,366

OPPORTUNITY NUMBER	OPPORTUNITY NAME	CUSTOMER NAME	CMR NUMBER	CUSTOMER SEGMENTATION	BUSINESS PARTNER	DISTRIBUTOR	PLATFORM TYPE	DEAL REGI: EXPIF
00605000003PBknAAG	Software JDE/WebSphere	Canada West Top		Co-Led	SIA Innovations Inc.	Arrow Electronics Canada, Ltd.	Software	€
00605000003PBq4AAG	Software CP4D Trade-up	Canada Ontario Atlantic Top		Co-Led	SIA Innovations Inc.	Arrow Electronics Canada, Ltd.	Software	€
00605000003PBq5AAG	Software CP4Applications Upgrade/Trade-up (WAS ND renewal)	Canada Ontario Atlantic Top		Co-Led	SIA Innovations Inc.	Arrow Electronics Canada, Ltd.	Software	€

Team Members

You can also add your team to your opportunity. This include IBMers and Distributors, is your choice.

The partner is the only person who can add a Team member.

- Enter Opportunities tab
- Click over the opportunity
- In the sub-menu there is Details, Related Information and Incentives.
- Click in Related Information
- Opportunity Team

IBM Partner Portal

Business Partner Opportunities

50+ Items • Sorted by Created Date • Filtered by All opportunities • Opportunity Record Type, BP Status

Opportunity Name	Customer Name	Estimated Sales Value	Created Date
1 LA Team Deal Registration Example - Software	TANGERINE BANK	CAD 5,000.00 (USD 3,333.35)	10/27/2021, 6:30 AM
2 LA Team Deal Registration Example - Hardware	TANGERINE BANK	CAD 5,000.00 (USD 3,333.35)	10/27/2021, 8:30 AM
3 WM - Jack - 1stHW - Hardware	WALMART INC.	USD 100.00	10/25/2021, 4:12 AM
4 WM - Jack - 1stHW - Hardware	WALMART INC.	USD 100.00	10/25/2021, 4:02 AM
5 WM - Jack - 1stHW - Hardware	WALMART INC.	USD 100.00	10/25/2021, 3:54 AM

IBM Passed Opportunities

3 Items • Sorted by Opportunity Name • Filtered by All opportunities • Opportunity Record Type, BP Status

Opportunity Name	Customer Name	Amount	Accept by Date
1 Oct 21 - Anu - Sing - Jack&H - template	COCA COLA LTD	USD 290.00	10/27/2021
2 Test Oct25 Passing	FARM CREDIT CANADA	CAD 51,119.00 (USD 34,079.52)	10/31/2021
3 Giving it a test of opportunity pass	HILTON KEYNES COUNCIL@CENTRAL PAYMENTS SECTION	USD 456.00	8/30/2021

Opportunity
LA TEST XXX - Hardware

[Find an IBM Seller for support](#) [Request Quote](#)

Customer Name: EL PALACIO DE HIERRO, S.A. DE C.V. | Solution: [LA TEST XXX](#) | Opportunity Owner: [Quote PRM BP User](#) | Deal Registration Expiry Date: 5/3/2022

Details **Related Information** Incentives

Opportunity Team (0)

Customer Contacts (0)

Chatter

Post

Share an update... [Share](#)

Sort by: Most Rec

How to appear in Directory

The IBM Partner Plus Directory is a worldwide search portal where visitors can find and learn about Partner Plus member companies. For eligible partners (Silver, Gold or Platinum), the IBM Partner Plus Directory is an essential IBM Partner Plus benefit.

Partners need to pro-actively create their profile with details about their company to appear in this Directory.

To complete this task, the person listed in the partner as the Business Partner Administrator must enter Partner Portal and click over [add listing](#) using a form in the Partner Portal. This benefit is available to Silver, Gold, and Platinum partners.

The screenshot displays the IBM Partner Portal interface. On the left, a navigation menu includes 'Home', 'Deals', 'Incentives', 'Learning and education', 'Benefits', 'Marketing explained', 'Directory Listings' (highlighted with a red box), 'IBM Partner Status Mark', 'Co-Marketing Center (CMC)', 'My Digital Marketing', 'Technical', 'Software Access Catalog', 'IBM Partner Plus Cloud Credits', 'Collaboration', and 'Technical Expert Engagement'. The main content area is titled 'Directory listings' and contains instructions: 'Create and manage your IBM Partner Plus Directory listings for each of your country enterprise IDs. To create a Directory listing, you need to be a Silver, Gold, or Platinum partner as well as a Business Partner Administrator.' Below this is a search bar and a table with columns: 'Company listing name', 'Company Listing ID', 'Legal name', 'Country enterprise ID', 'Listing status', 'Last Modified Date', and 'Published URL'. A red box highlights an 'Add listing' button in the top right corner. Below the table, a message states 'You have no listings yet' with a 'Click "Add listing" to create one' link. At the bottom, it shows 'Items per page 10' and '0-0 of 0 items'. A modal window titled 'Add new listing' is open, containing a 'Company' dropdown, 'Company listing name' field, checkboxes for 'Independent Software Vendor (ISV)', 'Managed Service Provider (MSP)', 'System Integrator (SI) - Global or Regional', 'Managed Security Service Provider (MSSP)', and 'SMB/Reseller/Solution Provider', a 'Summary' section with a text area, a 'Logo' upload field (max 500KB, supported types: .jpg and .png), 'Address' and 'City' fields, a 'Country' dropdown, 'Postal/ZIP code' and 'Country' fields, 'Company URL', 'Email (optional)', and 'Phone number (optional)' fields, and a 'By selecting "I agree", you confirm that:' section with a list of terms and an 'I agree' checkbox.

How to use Chatter

Chatter helps build your virtual sales team, streamlining communication to facilitate successful closure of an opportunity.

Visibility to Chatter is tied to visibility of the related record

e.g. Opportunity, Lead, Account, Contact. Anyone with visibility rights to the related record will have visibility to the Chatter entries.

NOTE: Anyone with a Partner Plus ID can use Partner Portal. You can use a Chatter window if you have access to the opportunity. Preferred Distributors and IBMers, can see all their reseller opportunities and can partake in Chatter **if identified/added**.

At any time you can also add someone to discuss about the opportunity.

The Opportunity Owner need to set up the team members working in this opportunity (he can include IBMers and Distributors as well). He can simply add **@personname** in the chatter and the tool will send an e-mail to this person.

Chatter Video Demo: [Here](#).

The screenshot displays the 'Opportunity' page for 'LA TEST for Quoting - Hardware'. The interface includes a header with navigation buttons ('Find an IBM Seller for support', 'Request Quote') and a main content area with tabs for 'Details', 'Related Information', and 'Incentives'. The 'Details' tab is active, showing fields for Opportunity Name, Opportunity Number, Close Date, Distributor, Restricted status, Stage, and Engage. A 'Chatter' window is open on the right, showing a post by '@[Tadeu Perarira de Moraes]' asking for help with the deal. Below the post, a dropdown menu is open, showing options to share the post with 'IBM Only' or 'All with access'. The 'Share' button is visible at the bottom right of the Chatter window.

How to use Ted (chatbot)

All pages from IBM Partner Portal has a blue tab in the right down corner saying “Need Help? Ask me”

If you click, it will open a box with our chatbot that is reviewed daily and you can ask all questions, or even receive indication of questions.

Take a look.

The screenshot shows the IBM Partner Portal interface with a 'Need Help? Ask us' chatbot window open. The chatbot window contains the following text:

Pour obtenir de l'aide, appelez le [1-800-426-9990](tel:1-800-426-9990)

Welcome to the IBM Partner Portal Chatbot. I am an automated support tool here to assist you with your questions.

If I am not able to find an answer, please contact our support team at the following frequently asked questions:

- IBM Partner Portal
- Opportunity Passing
- Deal Registration
- Product

Enter your response (English only)

The chatbot also displays a list of frequently asked questions under the heading 'Opportunity Passing FAQ':

- Who in my company will receive the opportunity notification?
- What happens when I accept an opportunity?
- What happens when I reject an opportunity?
- Will all business partners go into IBM Partner Portal to accept or...
- What is the enablement available for Opportunity Passing?

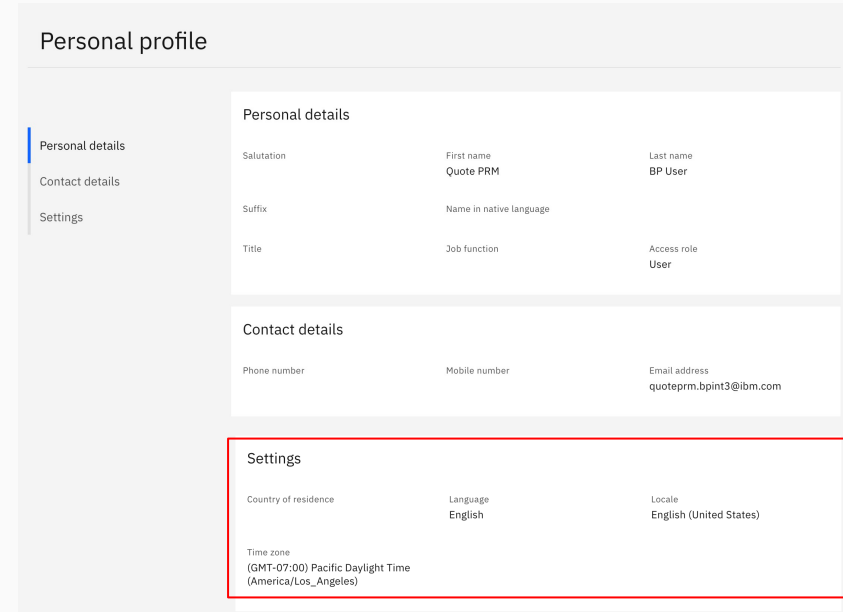
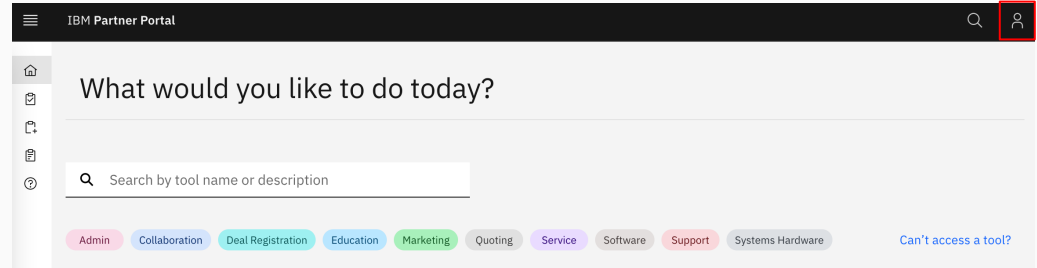
Enter your response (English only) →

Configure your Platform

You can configure your platform to show items according to what you're used to see.

For example if you personalize your time zone, besides adjusting the hour, it will also change day format:

- Day/month/year
- Month/day/year



Using Infrastructure Quoting (ePricer)

ePricer Direct Access:

<http://www.ibm.com/services/partners/epricer/v2/directLogin.do>

Impacts include:

- Accessing ePricer will become a simpler and more simplified process.
- CEID is country specific. If you have a CEID for Mexico, you can send contributions to Mexico.
- ePricer automatically determines the appropriate ePricer functions for the CEID / type of relationship selected.
- The name of its function has been updated to indicate its CEID and the type of relationship so that it is easier to identify it for the selection.
- A new function allows you to change the CEID roles and / or the ePricer if you have several CEID / roles.
- After migration epricer will only accept the new 18 digit opportunity ID (IBM Partner Portal ID)



Using Software Quoting (PGS)

Requesting a Software quote is made in a **system called Partner Guided Selling (PGS)** that is available inside **Passport Advantage online (PAO)**.

Passport Advantage Online (PAO) is a gateway to key features when managing software licenses. It helps with information about purchasing new software licenses, renew software subscriptions, download a software or getting reports personalized to your company.

Access Passport Advantage Online (reseller version):
<https://ibm.biz/PAOnline>

Learn more about [PGS here](#).

Passport Advantage Online

Price files Reporting & Notification Account management

0004063594 - TECH DATA MEXICO

Online Ordering

- Order status
- Saved shopping carts

Partner Guided Selling

- Partner Guided Selling

Software download & Price files

- Price files

Reporting & Notification

- Passport Advantage/Cloud Services Relational Agreement customers
- Passport Advantage Express/Cloud Services Transactional Agreement customers
- Active renewal lines

Account management

- Manage Access
- Self-nomination

Quick Entry

- Processor value unit calculator
- Build a quote in Partner guided selling
- Place an order
- PA/CSRA Customer Order history
- PAE/CSTA Customer Order history
- 365 Day Report
- Contact eCare

Deal Registration Program

If you need more clarification on Deal Registration Guidelines, more details on processes associated to deal management such as details on reviews, requirements for public sectors, terms and conditions, compliance and others, please use Deal Registration Guidelines at <http://ibm.biz/DealRegistrationProgram>



IBM Partner Support



[Back to Menu](#)

For questions regarding access and general doubts about IBM Partner Portal please Interact with IBM Partner Support Desk (ibm.biz/PartnerSupportDesk).

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