



# MySA User Guide for Business Partners

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## **Purpose of this Document**

This document summarizes frequently used functions of MySA, with step by step screenshots for easy reference. As our IBM Business Partner, you are always encouraged to review the online help and Education Videos if this document doesn't cover certain functions you need.

MySA Online Help can be accessed via <https://mysa.ibm.com/help/#/> or click on the Question Mark icon ⓘ in the top right corner of MySA screen.

Quick Education Videos can be accessed via <https://www-356.ibm.com/partnerworld/wps/servlet/ContentHandler/my-sales-activity-get-started>.

# 1 Overview

## 1.1 What is MySA

My Sales Activity (MySA) is a single end-to-end integrated Business Partner (BP) Portal with Next Gen User Experience enabling Discovery to Advocacy to maximize BP Experience. It is hosted on PartnerWorld.

Right now, only the Opportunity Management (OM) and incentive capabilities are available, with more to come.

## 1.2 Roles in MySA

There two types of roles in MySA, the OM Focal and the OM User. To login to MySA, you will need to be assigned as either OM Focal or OM User.

### OM Focal:

- is able to register new opportunities, and is automatically added to all opportunities, regardless whether the opportunity is coming from IBM or registered by anybody else in your company;
- is able to accept or reject opportunities coming from IBM on behalf of your company;
- is able to edit all opportunities owned by your company;
- is able to add any other OM User to Opportunity Team.

### OM User:

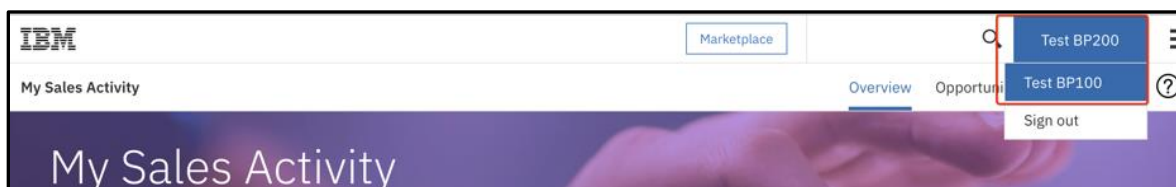
- is able to register new opportunity;
- is able to view all opportunities owned by your company;
- is able to edit opportunities when you are on the Opportunity Team;
- is able to add any other OM User to Opportunity Team.

User access to MySA is controlled by your Authorized Profile Administrator (APA) in PPS.

## 1.3 Logging into MySA

The only recommended web browser for MySA is Mozilla Firefox. You can use your IBM ID and password to login MySA with URL: <https://mysa.ibm.com>.

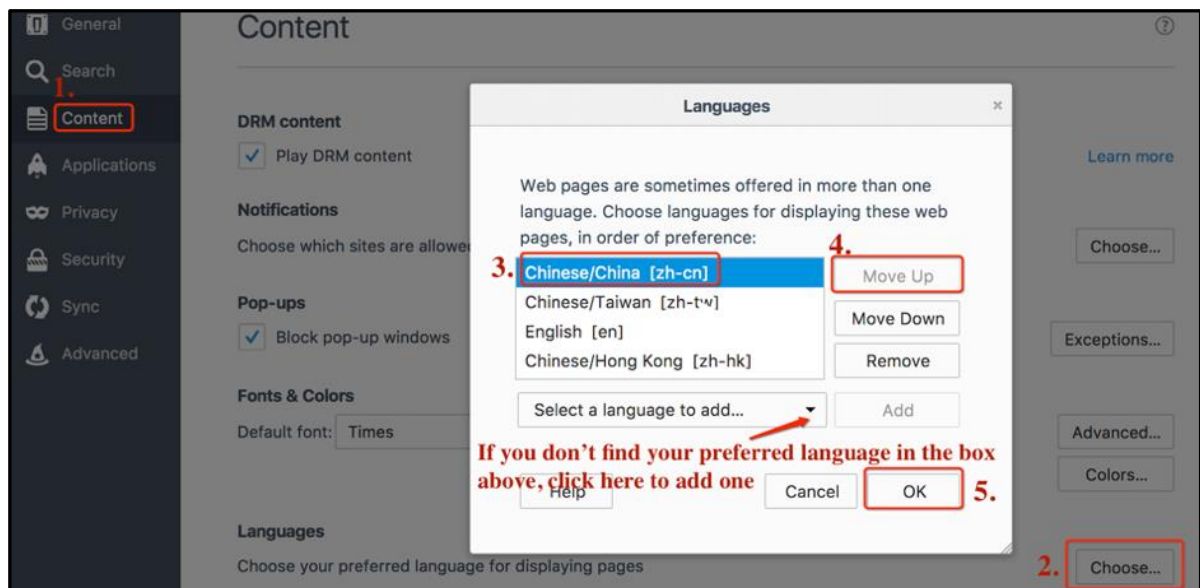
After login MySA, your company's name will display in the blue context box located in right up corner of the screen. If you register your single login ID with your multiple organizations. You can switch different organization's data by clicking in the blue context box, and selecting different company's name.



## 1.4 Setting MySA Language

MySA supports different languages. To see if MySA can display in the language you prefer, go to Firefox **Preferences** and change Firefox displaying language. To do this go to Firefox **Preferences**,

then click **Content**. In **Languages** section, select the preferred language and move it up to the top. Eg. select Chinese/China [zh-cn] to display the web page in Simplified Chinese, select Chinese/Taiwan [zh-tw] to display Traditional Chinese.




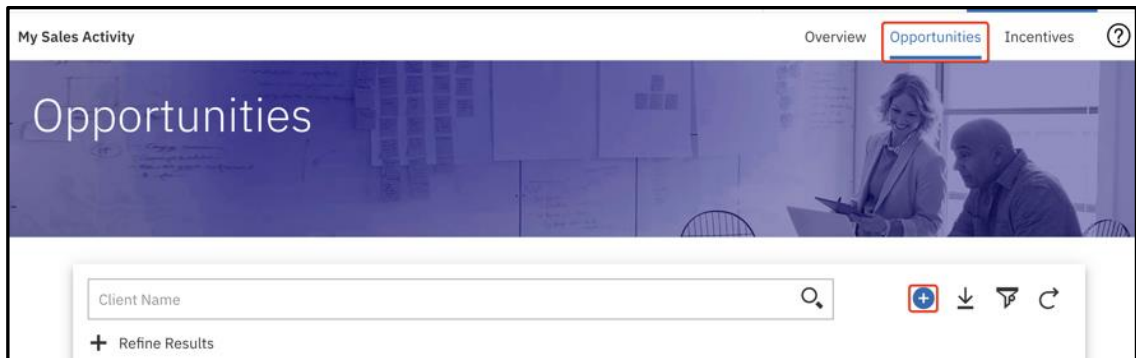
# 2 Opportunity

## 2.1 Creating an Opportunity

To create an opportunity, you have to complete necessary information in Opportunity Header, Line Items and Contacts.

### 2.1.1 Creating Opportunity Header

After logging into MySA, switch to **Opportunities** screen, and click on the **Plus button**  to open a new opportunity form.



The fields are mandatory to input are marked with red asterisk (\*). And fields indicating with “Select one” are selectable, most of which will remind you entering one or more characters when you are clicking on the fields. They will calculate the matching results based on your input, and you only need to select an appropriate value from the matching results.

<b>Description:*</b> <input type="text"/>	<b>Client Name: *</b> <input type="text" value="Select one"/>
<input type="checkbox"/> BP Private	<a href="#">Advanced Search</a>
<b>Client/Contact Data Restrictions:</b> <input type="text" value="Not restricted"/>	<b>Currency: *</b> <input type="text" value="USD (USD)"/>
<b>Sales Stage: *</b> <input type="text" value="Select one"/>	<b>Opportunity Team:</b>
<b>Decision Date:*</b> <input type="text" value="Feb 6, 2018"/>	<b>Name:</b> <input type="text" value="myPW US-One"/> <b>Role:</b> <b>Identifier</b>
	<input type="text" value="myPW US-One"/> <b>Noticer</b>
	<a href="#">+ Add Team Member</a>

Opportunity Codes:

CoMarketing UCID:

Campaign Code:

BP Opportunity Number:

Source:

- Description: Free text field. You can provide description or comment about the opportunity.
- BP Private: Checking this box will prevent the opportunity from being visible to IBM users who are NOT on the opportunity team. Please note that
  - BP Private is equivalent to “Work in GPP”
  - BP Private can only be set at opportunity creation, but it can be turned off later if necessary by removing the check. You cannot turn it on again after the check is removed
  - BP private will be turned off automatically when the opportunity is at closed sales stage (opportunity is won or lost), then the opportunity becomes visible to all IBM Users
- Client/Contact Data Restrictions: It is **equivalent to ‘Is Restricted’ in GPP**. By selecting the options of this field, you can control the Client information and Opportunity Description to share with specific group. Others who can see the opportunity but are not in the group only can see “**DATA WITHHELD**” in Client name and Description. You have 3 options for this field, after you are clicking on the field. “Not restricted” is default option. You can change the value of this field after the opportunity is submitted.

Client/Contact Data Restrictions:

- Not restricted
- Visible to opportunity and client team only
- Visible to opportunity team only

- Note: If you originally set the visibility controls for Client A but then change the Client on the opportunity to Client B, it removes the visibility restrictions automatically and you have to reset it if desired.
- Sales Stage: Specify the Sales Stage for the opportunity. Put the cursor over “Sales Stage” you can see the detail of each Sales Stage.
- Decision Date: Select the date by which the Client is expected to make a decision regarding the opportunity. It should be current or date in the future.



- Opportunity Codes: [Input the opportunity codes offered by IBM?](#) To align your opportunity to one or more of IBM’s key solutions or growth initiatives to enable measurement of the initiative success and ensure the right resources are in place to assist you.
- CoMarketing UCID & Campaign Code: Co-Marketing funding campaigns allows you to apply for shared funding for specific types of opportunities, where IBM has determined that it will reimburse Business Partners for certain costs associated with specific opportunities as part of various campaigns. You can associate an opportunity with a Co-Marketing funding campaign code when the opportunity is created or at any point. For more information about the Co-Marketing please visit the following link. At the bottom of the web page you will find the Co-Marketing Overview PPT.

<https://www-356.ibm.com/partnerworld/wps/servlet/mem/ContentHandler/co-marketing>

- Note: After you selected a CoMarketing UCID and saved the opportunity, CoMarketing UCID field is locked and no longer allowed to edit. But you can still allow to edit Campaign Code field

CoMarketing UCID:  
**TESTUCIDDONO**

Campaign Code:

- Source: Leave this field with default value “Business Partner”
- Client Name: Input the Client Name associated to the opportunity. In MySA All Business Partners Users and IBM users share IBM’s set of Client record. You can search a Client by inputting one or more characters of Client name (eg. input \$SME\$), and select the appropriate record from the matching list. Scroll down the list, you can find more clients.

Client Name: \*

Select one ^

\$SME\$

\$SME\$BPEDU - DC2HM1XK

**\$SME\$NHAug2015\$SME\$ - DC2CSW3G**

\$SME\$TestAugustClass\$SME\$ - DC2CSW1X

\$SME\$TestJan2016\$SME\$ - DC2DC4XV

\$SME\$NHSept2015\$SME\$ - DC2CSW9L

You can also use **Advanced Search** to search a Client.

Client Name: \*

Select one v

Advanced Search

Click the link of **Advanced Search**, a **Search and select client** screen will pop up.

You can search a Client either by **Business Name** or **CRM Number**. Check with IBM Sales Representative for Client's CMR number if necessary. Specify the country where the Client locates, input either Client's name or CMR number in the blank field where the keyword is not case sensitive. Then click on **Search** button to start searching.

A matching list pop up, validating the Client address or CMR number and select an appropriate record for the Client. If you have difficulty to identify the client record, please contact IBM Sales Representative for help. Scroll down to the bottom and click on **Select** button. It will return to opportunity page with Client name populated.

Business Name	Street address	City	State/Province	CMR number
\$SME\$Test Hong Kong	100 Tai Koo Road	Hong Kong		P01840
\$SME\$TestJan2016\$SME\$	1234 Fake St	Cavan	Cavan	P01846
\$SME\$TestAugustClass\$SME\$	123 Fake St	Dublin		P01388
\$SME\$Test China	Central North 6th Ring Road	Beijing	Beijing	P24273
\$sme\$testshelley	123 Street	Nowhere		P01720

If a Client record is not found, and you also have validated with IBM Sales Representative that it is a brand new Client to IBM. You can go ahead to create a new Client record in MySA. In **Search and select client** screen, click on **Create new** button

**New client information** form will display. Fields are mandatory to input are marked with red asterisk. Completed the form with necessary information.

The screenshot shows a form titled "New client information" with a purple header. It contains the following fields:

- Business name: \***: A text input field.
- Country / Region: \***: A dropdown menu with "Select one" and a downward arrow.
- Address: \***: A large text input field.
- City: \***: A text input field.

Scroll down to the bottom, check the box before the statement “By clicking “Create client”, I acknowledge that this is a new customer to IBM and NOT an existing customer with an existing CMR.” And click on button **Create client**.

This screenshot shows the bottom portion of the "New client information" form. It includes:

- City: \***: A text input field.
- State / Province: \***: A dropdown menu with "Select one" and a downward arrow.
- Address code:**: A text input field.
- \* By clicking "Create Client", I acknowledge that this is a new customer to IBM and NOT an exiting customer with an existing CMR.**
- Create client** button (highlighted with a red border).
- Cancel** button (highlighted with a purple border).

You may be presented with one final set of potential client matches to ensure your client is unique. If it is, you can click on **Create new** button to continue the creation and you can immediately use this client on the opportunity - there is no waiting period as it goes through the IBM processing in the background.

If the client record exists, just select the client, and click on button **Select**. It will return to opportunity page with **Client name** filed populated.

New matches found				
Business Name	Street address	City	State/Province	CMR number
\$SMESTest China	Central North 6th Ring Road	Beijing	Beijing	P24273

- Note: Because client information is maintained in a master database with multiple inputs, you are restricted from updating client information after it has been created. This makes it essential that the information about the client be absolutely correct and accurate when you create a prospect client.
- Currency: Select your preferred currency to display revenue
- Opportunity Team: Add opportunity members to your opportunity. When an opportunity is created, the opportunity team member with Identifier and Noticer roles must always be assigned. You, as the opportunity creator, are assigned as Identifier and Noticer by default, but you can assign them to others prior to the initial save action. Once you save the opportunity, these fields become read-only and you cannot change them.

**Opportunity Team:**

Name:		Role:
<input type="text" value="myPW US-One"/>	▼	<b>Identifier</b>
<input type="text" value="myPW US-One"/>	▲	<b>Noticer</b>
Please enter 1 or more characters		

You can add other individual who is already granted with MySA access or other Business Partner Company which is already deployed in MySA to your opportunities.

- Adding other user to your opportunities, click on the folded section Add Team Member. Input the person's name or email address (whole or partial) in the first field, and select the role for the person in the section field. Then click on Add button. The person added in the Opportunity Team is granted editable access to your opportunity.

Opportunity Team:

Name:  Role: **Identifier**

**Noticer**

- Adding other Business Partners to your opportunities, click on folded section Add Team Member, check Search Companies option and input Business Partner's company name (whole or partial) in the first field to start searching. Select the Role option as Business Partner. When you save this change, all the "OM Focal" users from that Business Partner company will be informed and added to the opportunity team.

Opportunity Team:

Name:  Role: **Identifier**

**Noticer**

Search companies

Click on  button you can remove a member from Opportunity Team

### 2.1.2 Creating Line Item

Scroll down in the page, you can find Line Item section. Click on the button **Add Line Item**.

**Line Items** + Details

---

An **Edit Line Item** screen displays. Offering Type (L-10) and Brand Code (L-20) are mandatory to input. You can input the key words in both fields and select appropriate value from the drop-down list respectively.

**Edit line item**

Advanced Keyword Search:

Keyword Search...

Offering Type (L-10): \*  
Select one

Brand Code (L-20): \*  
Select one

Or you can use **Advanced Keyword Search** field. When you search and pick up a higher level, subsequent lower levels are automatically filtered to match the higher product level, which is already selected.

For example, if you are planning to participate in CVR (Channel Value Rewards), you can find the eligible products in **CVR Eligible Part Number List** using the link:

[http://sc4.ihost.com/gpp/permanent/svi\\_eligible\\_part\\_numbers.pdf](http://sc4.ihost.com/gpp/permanent/svi_eligible_part_numbers.pdf)

If the part number you want is “D19SGLL”, checking the eligible list, the associated Brand Family under column “Brand Family (Level 20)” is “Cognos Analytics”.

CVR - Sales/Sales Assist Eligible Parts List

Part Number	Part Description Long	Type (Level 10)	Brand Family (Level 20)	Product Group/GPP Brand Certification Record	Authorization Required	Comment
D19SGLL	COGNOS ANALYTICS INFODIST PVU MONTHLY LICENSE	Analytics	Cognos Analytics	Advanced Analytics	Yes	May 18 2015: Added

You can input “Cognos” (not case sensitive) in the field under **Advanced Keyword Search** to start searching, when you select “Level 20: Cognos Analytics (BNS00)”,

**Edit line item**

Advanced Keyword Search:

Keyword Search... ^

cognos

- Level 20: Cognos-BI SW Services (BEE00)
- Level 20: Cognos Insight (BNJ00)
- Level 20: Cognos Analytics (BNS00)
- Level 20: Software: Cognos Disclosure Management on Cloud (BQJ00)
- Level 20: Cognos Analytics on Cloud (BRS00)

both **Offering type (L-10)** and **Brand Code (L-20)** will be populated.

- **Note:** The keywords input for search is not case sensitive. MySA support up to Brand Level 40. You can update both Brand Level 30 and Level 40, but it is not mandatory.

### 2.1.3 Adding Contacts

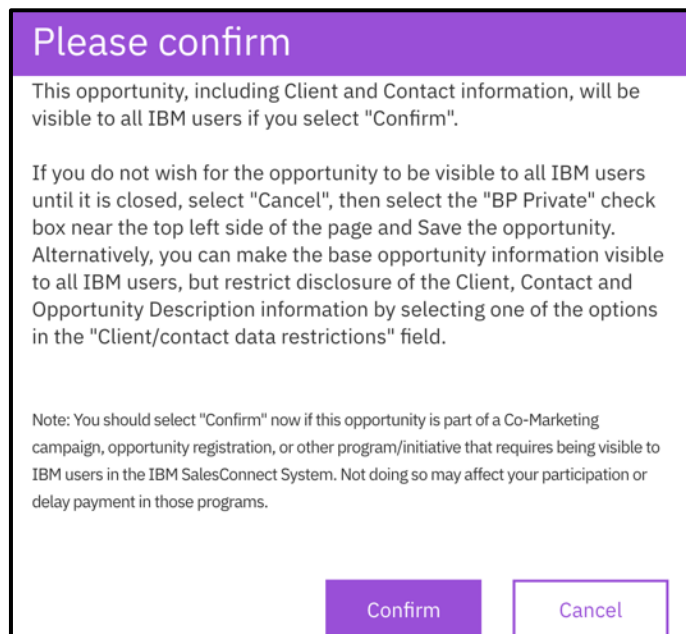
To add a contact in an opportunity, scroll down to **Contact** section, click on **Add Contact** and the field indicated with “Select one”. Then input contact’s name to search.

Select a contact record from the list and click **Add** button. You can add multiple contacts to one opportunity, but only one of them can be identified as **Primary Contact** which is listed in first one of **Contact** section. Clicking on the Contact’s name, you can view more detail of the contact from the pop-up screen and change contact information if necessary.

You can change Primary Contact by simply clicking on button of **Make Primary** to set the selected one as Primary Contact. Click on **-** button you can remove a contact record from the opportunity.

- **Note:** You cannot remove a Primary Contact from an opportunity. If you have to do that, replace it with another contact. When it becomes a non-primary contact, you can remove it.

When Opportunity Header, Line Items and Contacts are completed, it is ready to submit a new opportunity by clicking on the **Save** button at the bottom of the screen. A message will pop up to remind you that your opportunity will be visible to all IBM Users. If you don't wish your opportunity visible to all IBM, you need to click on **Cancel**, and go back to Opportunity Header to revise **BP Private** option and/or **Client/Contact Data Restrictions** field. Otherwise, click on **Confirm** button to create the opportunity.



## 2.2 Opportunities Passed from IBM

All OM Focals will receive an email for each opportunity passed to your company from IBM through Sales Connect. The e-mail has the following Subject Line:

**Important! Your company has been assigned ownership of Opportunity XX-XXXXXXX to "Accept"**

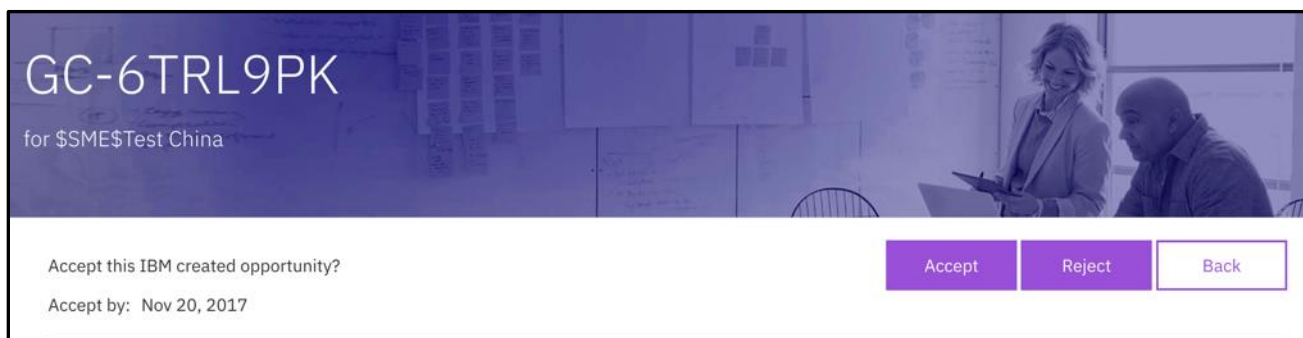
The IBM created opportunity which is passed to your company have the following format XX-XXXXXXX, e.g. GC-6TRL9PK. In MySA, you will find a new opportunity entry with **"Pending Acceptance"** status.

Sales Activity				
Opportunities				
Opportunity Number	Opportunity Description	Client	Owner Status	Decision Date
<a href="#">GC-6TRL9PK</a>	test only	\$\$SME\$Test China	Pending Ac...	Jan 7, 2018

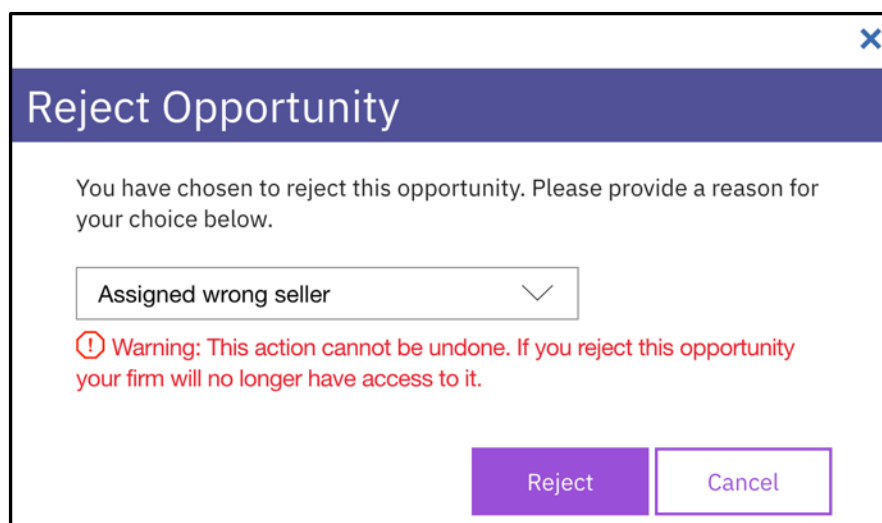
### 2.2.1 Accepting, Rejecting an Opportunity Passed from IBM



Click on the link of opportunity number to open the opportunity details. You have 3 options: to accept the opportunity, reject the opportunity or click on **Back** button to leave the opportunity and take no action. You can see the accept/reject due date is 5 calendar days from the date when the opportunity was passed.



To accept the opportunity, just simply click on **Accept** button before the due date. Click on **Reject** button to reject the opportunity. Then a new screen will pop up to remind you that you will no longer have access to it if you reject the opportunity and you to provide a reason for rejection. After you reject the opportunity, it will be returned back to the previous IBM Opportunity Owner.



**Note:** when the opportunity is in **Pending Acceptance** status (before you accept the opportunity), all the fields are locked and the **View/Add** Incentive button in MySA is disabled.





Number	Client	Description	Decision Date	Owner Status	Incentives	Sales stage
<a href="#">GC-6TRL9PK</a>	\$SME\$Test China	test only	Jan 7, 2018	Pending Acceptance	<a href="#">View/Add</a>	03-Identified/Valic

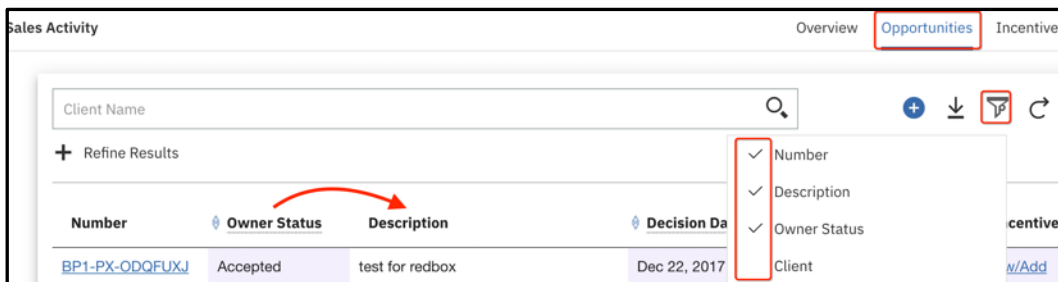
### 2.2.2 Withdrawing an Opportunity Passed from IBM

If an opportunity is not accepted or rejected by the due date, the opportunity will automatically withdraw back to the previous IBM Opportunity Owner, your company will no longer be able to view the opportunity in MySA/SC4BP

## 2.3 Searching for Opportunities

### 2.3.1 Opportunities Screen

Switching to **Opportunities** screen you can see all the opportunities owned by your company. Click on button  in up right corner you can customize the columns to display in opportunity screen. To display a column just check the column heading from the list after clicking on the  button. Otherwise uncheck it. If all the columns span beyond the size of the screen, a left-right scroll bar will appear immediately below the column headings. Scroll from left to right, you can view all the columns. The order of the columns can easily be changed by dragging and dropping the column wherever you want it to be located. Columns with sign  are sortable. And  is refresh button.

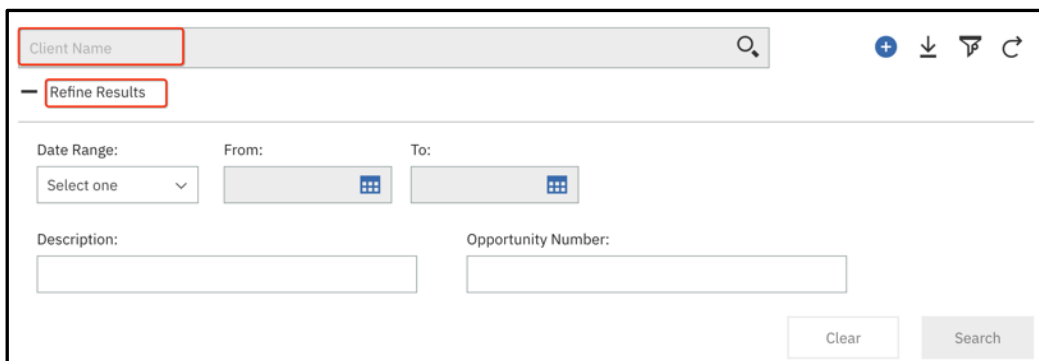


In addition, you no longer have to navigate the screen data on a page by page basis. These list screens now utilize infinite scrolling, which continues to display results as you scroll down the screen.

<a href="#">BP1-2F-EF7YJ45</a>	Accepted	test Tech Data	Jan 25, 2018	<a href="#">View/Add</a>
<a href="#">BP1-3G-FL2NG42</a>	Accepted	Test	Feb 14, 2018	<a href="#">View/Add</a>
<a href="#">BP1-4A-VN3OXW7</a>	Accepted	test education	Oct 16, 2017	<a href="#">View/Add</a>
<a href="#">BP1-6G-ACALX9P</a>	Accepted	ss03 test	Feb 7, 2018	<a href="#">View/Add</a>

### 2.3.2 Search for Opportunities

You can search by client name in the main search bar or/and click on **Refine Results** option to open additional search filters to allow more granularity in searching of the data within the screen.




Client Name

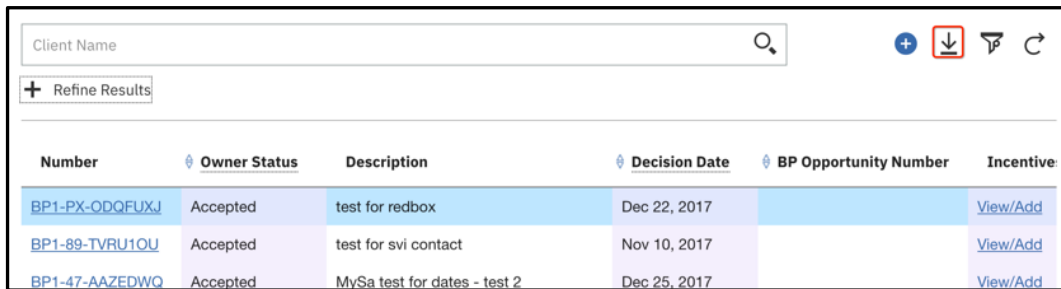
Refine Results

Date Range:  From:  To:

Description:  Opportunity Number:

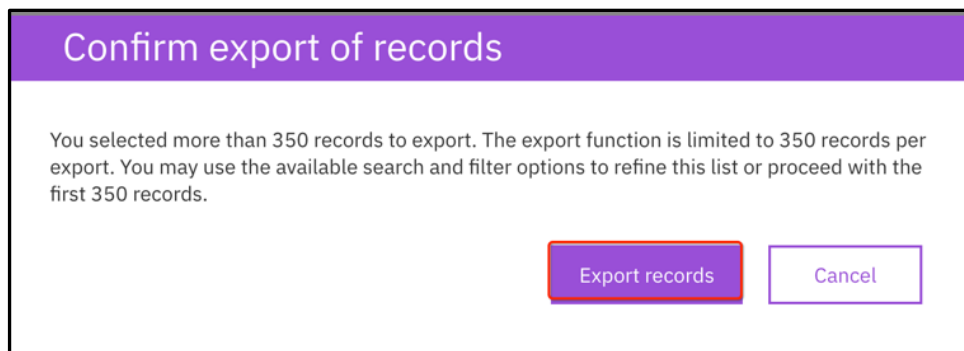
## 2.4 Exporting Opportunity List

Clicking the down arrow icon  allows you to export all the data from the Opportunities screen.




Number	Owner Status	Description	Decision Date	BP Opportunity Number	Incentive
BP1-PX-ODQFUXJ	Accepted	test for redbox	Dec 22, 2017		<a href="#">View/Add</a>
BP1-89-TVRU1OU	Accepted	test for svi contact	Nov 10, 2017		<a href="#">View/Add</a>
BP1-47-AAZEDWQ	Accepted	MySa test for dates - test 2	Dec 25, 2017		<a href="#">View/Add</a>

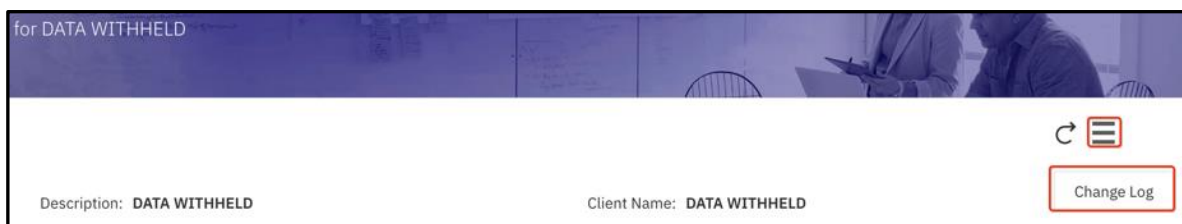
There is a limit on the number of records that can be exported, you will receive a message if the result set is greater than 350 records. You can export the first 350 records of opportunities from the screen displayed. Using filter to limit the number of the records displayed, you can export the record you want.



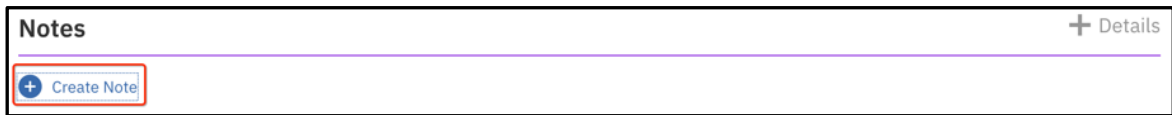
You should be prompted by your browser to save a csv file. You can open the opportunity list in Excel.

## 2.5 Creating Notes in Opportunity

When an opportunity is created, a Notes section will appear. You can use notes as a way to attach files, documents, or collateral marketing materials related to the opportunity itself, share which with opportunity team members. You can also use Notes to remark the reason why you changed a certain field, though system log can indicate who/when changing what information which can be accessed from the top right corner (by clicking on button  and button Change Log) in a specified opportunity page.



To create a note, scroll down to **Notes** section, click on **Create Note**.



A new screen will display. Only **Title** field is mandatory. Click on **Save** after you finish a note.

To edit an existing note, click on the **Notes** section to extend the note entries, then click on the specified note title. A notes details will display in a new screen. You are allowed to make the changes.



**Note:**

- Only one attachment can be on a single note. If multiple attachments are needed to be associated, then multiple notes are required.
- The attachment in a Note are distinctly for the opportunity and are available to all IBM Users with access to that opportunity.
- Opportunity notes should NOT be used for attachments explicitly for incentive submissions - these incentive attachments are to be added to the incentive form itself.

## 2.6 Modifying an Opportunity

Locate the required opportunity record scroll down the bottom click **Edit** button, you can make change of the opportunity, and click **Save** after change is completed.

**Note:**

- If a CVR has submitted, the fields of Client name and Brand Level 10 and Level 20 of Line Item in the associated Opportunity are not allowed to change
- If an Incentive has been submitted for the associated opportunity, when you change the opportunity, you also have to go to the associated Incentive, press refresh button and save the updates.

### 3 Incentives

Once your company has become the owner of an opportunity, you can add an incentive program to the opportunity. This section provides the steps on adding and updating Channel Value Rewards (CVR) incentive program to an opportunity. Other incentive programs would share similar steps though not specifically included here. Please refer to the online help for details on how to add other incentive programs.

#### 3.1 Submitting Channel Value Rewards (CVR)

Channel Value Rewards (CVR) is an IBM program that rewards Business Partners for the value they contribute during the sales cycle of a software sale.

To learn more about CVR, go to the Channel Value Rewards web page at the following URL:

<https://www.ibm.com/partnerworld/softwarevalueincentive>

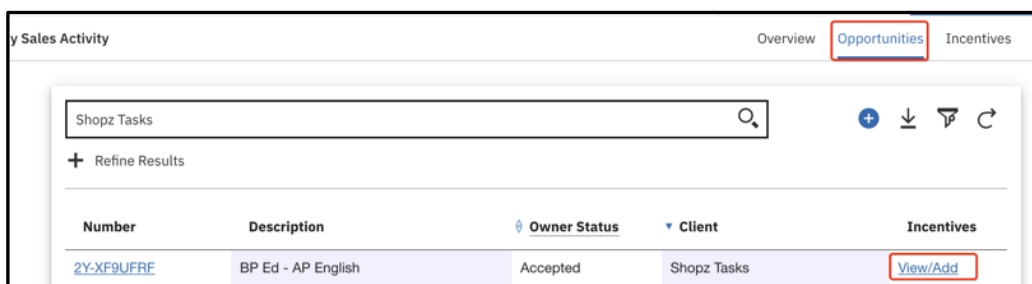
For specific program questions, refer to the Channel Value Rewards Business Partners Operation Guide for your country at the following URL:

[https://www.ibm.com/partnerworld/mem/sell/sel\\_sip\\_svi\\_opguide.html](https://www.ibm.com/partnerworld/mem/sell/sel_sip_svi_opguide.html)

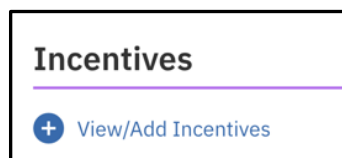
For a full step-by-step guide in PDF format, refer the MySA Opportunity Management Guide:

[https://www.ibm.com/partnerworld/wps/servlet/mem/ContentHandler/swg\\_ast\\_sfw-mysa-opportunity-management-guide/lc=en\\_ALL\\_ZZ](https://www.ibm.com/partnerworld/wps/servlet/mem/ContentHandler/swg_ast_sfw-mysa-opportunity-management-guide/lc=en_ALL_ZZ)

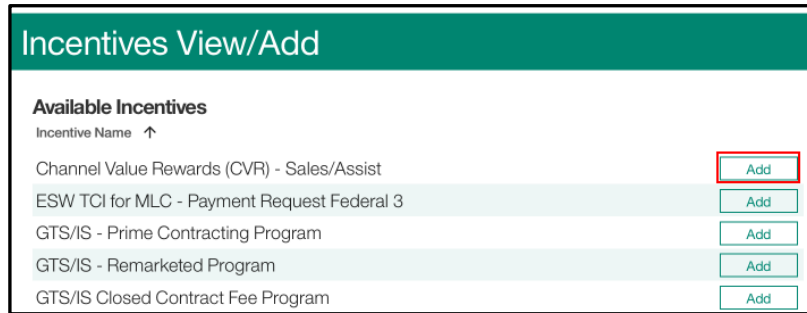
To apply for CVR, in **Opportunities** screen, click on **View/Add** button after locating the required opportunity record.




Alternatively, open a specified opportunity record, scroll down to **Incentives** section, click on **View/Add Incentives** button.



An Incentive View/Add screen will display. Scroll down to **Available Incentives** part, click on **Add** button besides to Channel Value Rewards (CVR) – Sales/Assist.



A new screen displays. Data in the top section (in a grey box) is read only and extracted from associated opportunity. If there is a need to revise the data in top section, click on the link of opportunity number in the upper left corner. You can open the opportunity details, make necessary changes. Then go back to CVR from gain, click refresh button  to reflect the update.



In the middle section, provide comments and other required information. Please note the CVR-specific information fields depend on the CVR incentive status.

Click on **View/Add attachments** button to attach any necessary files. Among all the attachments the most important one is the completed **BANT** form.

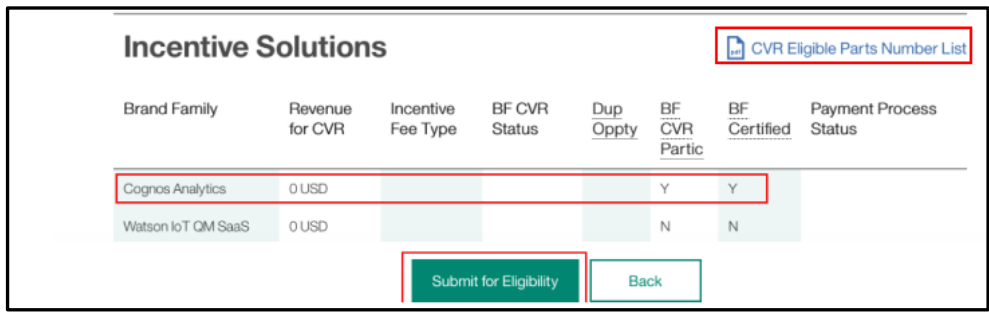


The bottom section is Incentive Solutions, displaying all the line items of the associated opportunity regardless of applicability to the current incentive.

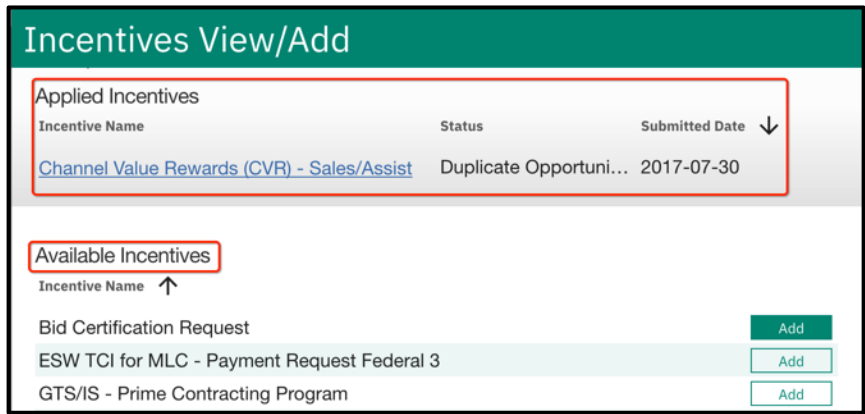
For an opportunity to meet the CVR requirements, it must be in **Sales Stage 04, 05 or 06**, and at least one of the line items must have a “Y” in both columns of **BF CVR Prtic** (Brand Family CVR Participation) and **BF Certified** (Brand Family Certification)

- BF CVR Prtic – is automatically populated with a “Y” if the chosen Level 20 value in Line Item of associated opportunity is in CVR Eligible Parts Number List
- BF Certified - is automatically populated with a “Y” based on your company’s CVR certifications from Partner Profile System (PPS)

To view the CVR Eligible Parts Number List, click the link in top right corner of Incentive Solutions section.



If you are ready to submit the opportunity click on **Submit for Eligibility** button. Otherwise, click on **Back** button to return to Incentive Add/View Screen without saving the updates. Once the CVR is submitted, it returns to Incentive View/Add screen. Channel Value Rewards (CVR) – Sales/Assist will become a link and be moved from **Available Incentives** to **Applied Incentives** section. You can click on the link to view the CVR details.



**Note:**

- It takes a few minutes for synchronizing data in back end after incentive is submitted, you will not see the incentive name in Applied Incentives section until the synchronization is completed
- Primary Client Contact must be provided with necessary information: First Name, Last Name, Job Title, email and Phone number
- If a CVR is submitted, the L10 and L20 fields in Line Items and the Client will be locked. If you want to make change for these fields, you need to contact Incentive Review Team to return the CVR to “Draft” status, then make changes and submit CVR again
- If you want to cancel an already approved CVR, you can contact Incentive Review Team to withdraw the CVR in GPP; You cannot delete or cancel it yourself.

### 3.2 Searching for an Incentive

To search an incentive, you can use filter function after switch to **Incentive** Screen. It shares a similar approach to search an incentive or opportunity, please refer to 2.3 [Searching for Opportunities](#) for more details.

My Sales Activity Overview Opportunities Incentives

🔍 ⏴ ⏵ ↺

— Refine Results

Date Range: From: To:

Select one

Incentive: Opportunity Number:

Select one

Clear Search

🔍 Incentive Name   🔍 Status   ▾ Submitted Date   🔍 Client   🔍 Opportunity Description

### 3.3 Updating CVR information


In case you need to update information in CVR, please follow below steps:

- 1) Locate the associated CVR. Scroll down to the bottom, and click Edit button;


**Incentive Solutions** [CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	0 AUD		Ineligible		Y	Y	
Cognos Analytics on Cloud	0 AUD		Draft		Y	Y	
Watson Education Classroom	0 AUD		Ineligible				

**Edit** **Back**

- 2) In case you want to update your opportunity, scroll up to the top, click on the opportunity number in the upper left corner, to open the associated opportunity. Make change in opportunity if necessary. Move back to CVR screen, press Refresh button . Skip this step if there are no updates to the opportunity;

**for BP1-XK-W4U9XTH**



Incentive Status: <b>Duplicate Opportunity Search</b>	Opportunity Description: <b>Testing</b>
Client: <b>Test</b>	Total Opportunity Revenue: <b>0 AUD</b>
Government owned: <b>Unknown</b>	Opportunity Create Date: <b>30 May 2017 12:15:49 PM GMT</b>
Primary Client Contact: <b>Ya Sha Yang</b>	Sales Stage: <b>05-Qualified/Gaining Agreement</b>
Submit for Eligibility Date: <b>6 Jun 2017 10:24:53 AM GMT</b>	Decision Date: <b>24 Aug 2017</b>
Expiration Date: <b>3 Dec 2017 11:24:54 AM GMT</b>	
Submit for Payment Date:	



- 3) Amend the rest of the fields in CVR as necessary;
- 4) Scroll down to the bottom. Click on button Update CVR-Sales/Sales Assist to save changes.

Incentive Solutions							
Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
Watson Education Classroom	0 AUD (0 USD)				N	N	
API Economy	0 AUD (0 USD)				Y	N	
Cognos Analytics on Cloud	0 AUD (0 USD)				Y	Y	

[CVR Eligible Parts Number List](#)

**Note:**

If an CVR is submitted, the **L10** and **L20** fields in **Line Items** and the **Client** will be locked. If you need to make changes on these fields, contact Incentive Review Team to return the CVR to “**Draft**” status. Then you can make changes and submit CVR again.

### 3.4 Extending a CVR incentive

You can extend an approved CVR incentive if required. Expiration date can be found in the header of the CVR.

Incentive Status: Duplicate Opportunity Search	Opportunity Description: Test
Client: Shopz Tasks	Total Opportunity Revenue: 0 USD
Government owned: Unknown	Opportunity Create Date: 27 Jul 2017 5:03:14 AM GMT
Primary Client Contact: Anthony Chooga	Sales Stage: 04-Validated/Qualifying
Submit for Eligibility Date: 30 Jul 2017 10:02:57 AM GMT	Decision Date: 25 Oct 2017
<b>Expiration Date: 26 Jan 2018 11:02:57 AM GMT</b>	
Submit for Payment Date:	

To extend an CVR, you need to submit a new opportunity. In the new Opportunity, provide all necessary information, and in the CVR Comments field specify that the new opportunity is copy being used to extend the CVR incentive, and submit the CVR for consideration by the IBM approval team. You can optionally attach files to the incentive by using the link **View/Add attachment**. Refer to section 3.5 Attaching Files to an Incentive for detail.

### 3.5 Attaching Files to an Incentive

- As part of the incentive form completion, you can add files to the incentive prior to submitting it to the IBM approval team. To attach files to the incentive form, click link of View/Add attachment in the incentive form.

CVR Comments:

View/Add attachments

- Attachment screen displays. Click Browse button to upload a file. You can only upload one file at a time. Type comments in Description field if any. Click the Attach button.

Attachments

No attachments



File Name:



Description:

- While file is uploading, the upload process shows “Pending...”. To attach additional files, repeat steps above. Click the Cancel button to return to the Incentives screen.
- Note:
- The Completed BANT form must be attached to the CVR form
- You cannot delete an already attached file
- Once submitted, you can only view the file names that were submitted to IBM, but to open the file it must reside on your local machine
- You cannot attach a file with the same name multiple times - each subsequent version of the file must have a unique file name in order to be saved successfully
- Avoid the use of special characters in the file name because of the potential impact to the successful flow of the attachment to the IBM team

### 3.6 Downloading an Incentive List

To export a list of your submitted incentive, on Incentive screen

- Directly click on Download icon , you will get a full list of all your submitted incentive
- Alternatively, display the required incentives by using filter function, and click on the Download icon  to export the incentive list you need.

<input type="text"/> <span style="float: right;">    </span>				
+ Refine Results				
Incentive Name	Status	Submitted Date	Client	Opportunity Description
<a href="#">Channel Value Rewards (CVR) - Sales/Assist</a>	Duplicate Opportunity Search	Nov 17, 2017	\$SME\$Dummy Austria	Test Eddie 9
<a href="#">Channel Value Rewards (CVR) -</a>	Duplicate	Nov 17, 2017	中國信託證券投資信託股份有	

# Appendix

## 1 APA Instructions for MySA Access

User access to MySA is controlled by your Authorized Profile Administrator (APA) in PPS, which they sign onto via the IBM PartnerWorld website:

<https://www-304.ibm.com/partnerworld/wps/servlet/mem/ContentHandler/partnerworld-member?lnk=fif>

The steps are as follows:

- a) In the top right-hand side corner, select Roles and then Administrators from the dropdown;
- b) On the Administrator Resources page, scroll to the section called Manage Employee Profile, then select the Update registered employees, roles, and access link;
- c) Click the Select hyperlink next to the user who need access to MySA, then scroll down to the Select Action dropdown box and choose Employee Roles;
- d) Click the large arrow to the right of that box to edit the user's role;
- e) Scroll to the bottom of the next page and locate the Sales Connect Roles check boxes;
- f) Select only one position: either OM Focal or OM User;
- g) Hit Submit after selecting the appropriate role for the user. Repeat for other MySA users at the same firm.

**Note:** Updates from PPS to MySA may take from three hours to overnight, as a result user access isn't granted immediately.

## 2 Support Contacts

### 2.1 Email of Support Team

AP PWCS: [pwcs@au1.ibm.com](mailto:pwcs@au1.ibm.com);

AP CRM Helpdesk: [apcrmhd@my.ibm.com](mailto:apcrmhd@my.ibm.com).

### 2.2 Support Phone numbers by Country

The link to view support phone numbers by country is

<https://www.ibm.com/partnerworld/wps/servlet/ContentHandler/contact-partnerworld>. Details have been listed below:

- Australia

**Help Desk Service Hours:** 9:00 AM - 5:30 PM (Sydney time)

**Phone support:** 1800-637-713

**Follow the phone guidance:**

Press **4** for Business Applications

Press **2** for CRM Applications Support

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR  
Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- China

**Help Desk Service Hours:** 9:00 AM - 6:00 PM (China time)

**Phone support (Mandarin):**

North China: 10800-610-0126; South China: 10800-261-0126

**Follow the phone guidance:**

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Hong Kong

**Help Desk Service Hours:** 9:00 AM - 6:00 PM (Hong Kong time)

**Phone Support:** 800-933-594

**Follow the phone guidance:**

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- India

**Help Desk Service Hours:** 8:30 AM - 5:00 PM (India time)

**Phone Support:** 61-2-9407-9452

**Follow the phone guidance:**

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Indonesia

**Help Desk Service Hours:** 8:00 AM - 6:00 PM (Indonesia time)

**Phone Support:** 001-803-61-423

**Follow the phone guidance:**

Press **4** for Business Applications

Press **5** for CRM Applications Support

- Korea

**Help Desk Service Hours:** 9:00 AM - 7:00 PM (Korea time)

**Phone Support:** 080-3781-114

**Follow the phone guidance:**

Press **3** for CRM Applications Support

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Malaysia & Vietnam

**Help Desk Service Hours:** 8:00 AM - 6:00 PM (Malaysia time)

**Phone Support:** 1800-801-999

**Follow the phone guidance:**

Press **4** for Business Applications  
Press **5** for CRM Applications Support

- New Zealand

**Help Desk Service Hours:** 9:00 AM - 5:30 PM (Sydney time)

**Phone Support:** 0800-444-714

**Follow the phone guidance:**

Press **5** for Business Applications

Press **2** for CRM Applications Support

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Philippines

**Help Desk Service Hours:** 8:00 AM - 6:00 PM (Philippines time)

**Phone Support:** 1234-616-784-772

**Follow the phone guidance:**

Press **4** for Business Applications

Press **4** for CRM Applications Support

- Singapore

**Help Desk Service Hours:** 9:00 AM - 6:00 PM (Singapore time)

**Phone Support:** 800-6161-468

**Follow the phone guidance:**

Press **4** for Business Applications

Press **5** for CRM Applications Support

- Sri Lanka

**Help Desk Service Hours:** 8:30 AM - 5:00 PM (India time)

**Phone Support:** 61-2-9407-9452

**Follow the phone guidance:**

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Taiwan

**Help Desk Service Hours:** 9:00 AM - 6:00 PM (Taiwan time)

**Phone Support:** 00801-611-256

**Follow the phone guidance:**

Press **4** for CRM Applications Support:

Press **1** for Mandarin

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

Press **2** for English

Press **1** for SalesConnect, Global Partner Portal, FxHub

Press **2** for e-Pricer, e-config, EPR

Press **3** for R2C Deal Hub Connect, Proposal and Presentation Accelerator, Deal Workflow

- Thailand

**Help Desk Service Hours:** 9:00 AM - 6:00 PM (Thailand time)

**Phone Support:** 001-800-611-2159

**Follow the phone guidance:**

Press **4** for Business Applications

Press **5** for CRM Applications Support