

BUSINESS PARTNER SPECIAL BID SUBMISSION MATRIX

TYPE OF BP REQUEST:	BP TEP Special Bid for HWMA or Services	BP TEP Special Bid Add to	ALF Waiver/Discount Request	Enhanced SW Base Charge Waiver/Proration
WHEN TO USE:	For eligible new or renewal opportunities where HWMA, SWS or RTS special bid discounting is needed to win an opportunity	For eligible opportunities where HWMA, SWS or RTS special bid discounting is being requested as an add to an existing contract (existing contract may or may not be discounted)	Waiver requests should be submitted only when a SWMA ALF charge is being assessed due to an IBM error or fault. Discounting may be requested for other situations where SWMA is not ISAT prorated, but must have a strong business case to be considered	For submission of Enhanced SW Base and/or Options charge waiver/removals or proration in cases where the client already has base charges present on a contract for the same enhanced SW offering
COL SUPPLIER ORG:	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests
COL TRANSACTION TYPE:	SB New or Renewal *	SB Add To Request *	ALF Waiver Request *	Enhanced SW Base Charge Removal *
COL DOCUMENT FLOW:	XX New SB (XX=AVT, Dist or SP) *	XX Add to SB (XX=Dist or SP) *	ALF or Parts Locker (SP if appropriate) *	Enhanced SW Base Charge Removal *
WHAT TO SUBMIT:	BPSB Input Spreadsheet, ISAT HTML file and completed COL template questions	BPSB Input Spreadsheet (if new MT or offering), ISAT HTML file and completed COL template questions	ALF Discount Request Form and ISAT HTML file or BPSB Input Spreadsheet (if part of a special bid request for the larger inventory) and ISAT HTML file	ISAT HTML file and completed COL template questions
NOTES/TIPS/COMMENTS:	<ol style="list-style-type: none"> 1) All required information must be entered on BPSB Input Spreadsheet and validation of the form must be completed before submission. 2) Include an annual STD PP option on your ISAT proposal. 3) Do not paste in a manner that overwrites formats (paste values or match destination formatting). 	<ol style="list-style-type: none"> 1) All SB adds must be submitted via this type even if existing contract does not have discounts already. 2) If new discounts/content is being submitted a completed BPSB Input Template is required outlining the target EU price, etc. 3) If new discounts are being requested and existing contract is prepay, a "dummy" standalone proposal containing only new content requesting discounts for must be included with submission, as well as the actual merge proposal. See SB Administrators Guide. 	<ol style="list-style-type: none"> 1) Full waiver requests for issues that were not due to an IBM error should not be submitted. 2) Additional discounts for SWMA ALFs that are prorated in ISAT will not be considered. 3) Review particulars with your SWS Channel Rep or BP Channel Rep before submitting if you feel you have circumstances that warrant waiver so they may help you to provide details. 	<ol style="list-style-type: none"> 1) The active contract that contains the base charges must be provided. 2) Base charges will be prorated unless otherwise specified by the Offering Owner (Seamus Keane). 3) Special circumstances should be detailed and reviewed with your SWS Channel Rep or Seamus Keane before submission.
COL REGISTRATION TYPE:	Special Bid Registration	Special Bid Registration	Special Bid Registration	Special Bid Registration
TYPE OF BP REQUEST:	End of Service/IBM HW Support Extension	MVS Express (Multiple Vendor Services)	Enhanced Parts Inventory (Parts Locker)	DRISC
WHEN TO USE:	To request extended HWMA service coverage for IBM logo'd MTMs that have been withdrawn from IBM service and to request subsequent MVS coverage if applicable	When requesting pricing approvals for OEM products. There will be different transaction types for non-IBM Logo Vend, IMS "S" Status Approval, Sun Storage Products Approval.	To request pricing and approval for on-site parts inventory to support installed machines on IBM HWMA or warranty	For State and Local government opportunities where approved BP is selling to an Agency from an IBM negotiated State contract and the State allows for the use of the Direct Reseller Program for IBM State Contracts (DRISC) model
COL SUPPLIER ORG:	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests
COL TRANSACTION TYPE:	End of Service Request *	MVS Express *	Parts Locker Request *	DRISC Quote (Dist or SP) *
COL DOCUMENT FLOW:	XX EOS with MVS PATH (XX=Dist or SP) *	MVS Request (SP if appropriate) *	ALF or Parts Locker (SP if appropriate) *	DRISC Quote (Dist or SP) *
WHAT TO SUBMIT:	End of Service Template & ISAT proposal containing the "IBM HW SUPPORT EXTENSION" offering with requested coverage dates	Completed MASVEND form with configuration details and quantities. ISAT proposal HTML containing the "IBM HW MA SERVICE FOR MVS - BP" offering with dates aligned to requested coverage dates	Enhanced Parts Inventory Template & ISAT proposal containing the "Enhanced Parts Inventory - BP" offering	BPSB Input Spreadsheet & ISAT HTML file
NOTES/TIPS/COMMENTS:	<ol style="list-style-type: none"> 1) Do not paste in a manner that overwrites formats (paste values or match destination formatting). Do not change formatting or enter information on the example tab. 2) Provide requested coverage dates on form, not the actual contract/proposal start/stop dates. 3) Include "Installed At" CN, address & phone. 4) Features are no longer required 5) Answer questions about vend options in the COL record in case the request must be sent for vendor quote. 	<ol style="list-style-type: none"> 1) Do not paste in a manner that overwrites formats (paste values or match destination formatting). 2) Complete MASVEND form in it's entirety. If multiple terms or start/stop dates are being requested use additional cost case sections on same form. 3) Include all features, types of hard drives and quantities (billable and non) 4) Include "Installed At" address & phone # 	<ol style="list-style-type: none"> 1) All equipment must be on IBM HWMA or warranty 2) Include all features (billable and non) 3) Include "Installed At" CN, address 4) Should be on same contract as HWMA 	<ol style="list-style-type: none"> 1) Do not paste in a manner that overwrites formats (paste values or match destination formatting). 2) All required information must be entered on BPSB Input Spreadsheet and validation of the form must be completed before submission. 3) Provide the State contract # and minimum discount or price by line item.
COL REGISTRATION TYPE:	Special Bid Registration	Special Bid Registration for MVS	Special Bid Registration	DRISC
TYPE OF BP REQUEST:	OEM IMS S Status	ReEstablishment Waiver Request	EDR (Existing Discount Renewal) Review	BPSB Input Template Support
WHEN TO USE:	When requesting pricing approvals for Specific OEM products as categorized as "S" Status on the IMS to IBM matrix spreadsheet	To request waiver or discounts for ReEstablishment fees associated with a lapse in HWMA coverage	To request review of renewal proposals to determine if it still meets criteria for EDR (Existing Discount Renewal) process	To report issues with the BPSB Input Template
COL SUPPLIER ORG:	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests
COL TRANSACTION TYPE:	IMS S Status Approval *	ReFee Waiver XXXX (where XXXX= waiver type) *	EDR (Existing Discount Renewal) Review *	BPSB Input Template Support *
COL DOCUMENT FLOW:	S Status & Sun Storage Products Request *	ReFee Waiver XXXX (where XXXX = waiver type) *	EDR (Existing Discount Renewal) Review *	BPSB Input Template Support *
WHAT TO SUBMIT:	IMS "S" Status Approval: spreadsheet containing the IBM psuedo machine types, models & serials is required, BPSOS will return approval to quote or rejection.	ISAT proposal HTML file for all requests. Used equipment waivers must also include invoices or PO showing the date of the sale, client who purchased and serial number(s).	ISAT HTML file created for renewal purposes using the "Create Renewal" function in ISAT.	BPSB Input Template populated with the ISAT ODS file in which you experienced issues, the ODS file you imported and print screens of the issues encountered with details as to the actions you were taking.
NOTES/TIPS/COMMENTS:	<ol style="list-style-type: none"> 1) Include all features and quantities on the latest form available in the Document Library on Partnerworld. 2) BPSOS will return approval with IBM psuedo MTMs if it can be supported. 	<ol style="list-style-type: none"> 1) Ensure the proper ReFee waiver transaction type is selected depending upon the clip level or whether it is for used equipment. 2) The appropriate ReFee offering must be present on the ISAT proposal. DO NOT OMIT. 3) If approved, a discount for full waiver will be applied to the ReFee offering by BPSOS. 	<ol style="list-style-type: none"> 1) Refer to EDR document posted on PartnerWorld for process criteria and steps to create your renewal. 2) Renewals not EDR eligible will require TEP BPSB submission for full review. 	<ol style="list-style-type: none"> 1) Detailed information is a must in order for the developer to troubleshoot errors. Please includes steps you were taking as well as any unusual symptoms, etc. 2) Don't forget to attach the ODS file too, even though it is already imported into the template. 3) Check to ensure you are using the latest version posted on PartnerWorld.
COL REGISTRATION TYPE:	Usual Maintenance Group if no SB discounting	Special Bid Registration	NA	Special Bid Registration

BUSINESS PARTNER SPECIAL BID SUBMISSION MATRIX

TYPE OF BP REQUEST:	BP Non-Standard Offering Requests			
	SWXcel Managed Service (TAM)	Custom Technical Support	Open Source Software (OSS) or RedHat	SUSE- Ubuntu - Other
WHEN TO USE:	When requesting pricing for zSeries Technical Account Manager premium offering for high availability requirements in addition to the benefits included with Enterprise Editions	When requesting custom technical support that is outside the scope of the CTS or Proactive offerings available in ISAT	When requesting pricing for Open Source Software or Red Hat offerings that are not quoted via a unique ISAT offering	When requesting pricing for SUSE, Ubuntu or other software offerings that are not quoted via a unique ISAT offering and not identified under another type
COL SUPPLIER ORG:	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests
COL TRANSACTION TYPE:	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *
COL DOCUMENT FLOW:	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *	BP Non-Standard Offering Requests *
Non Standard Bid Type	SWXcel zTAM	Custom Technical Support	OSS / RedHat	Ubuntu / Other
WHAT TO SUBMIT:	BP Non-Std SB Offering Support Request Questionnaire with the "Start Here" and "SWXcel Managed (TAM)" tabs completed and an ISAT HTML file containing the "SOFTWAREXCEL ENT z SYS MANAGED " set up with appropriate dates.	BP Non-Std SB Offering Support Request Questionnaire with the "Start Here" and "Custom Technical Support" tabs completed and an ISAT HTML file containing the "Custom Software Services" offering or offering outlined by the Offering Owner.	BP Non-Std SB Offering Support Request Questionnaire with the "Start Here" and "OSS" or "RedHat-SUSE-Other" tabs completed (as appropriate) and an ISAT HTML file containing the appropriate ISAT offering as outlined by the offering SME listed in the form.	BP Non-Std SB Offering Support Request Questionnaire with the "Start Here" and "RedHat-SUSE-Other" tabs completed and an ISAT HTML file containing the appropriate ISAT offering as outlined by the offering SME listed in the form.
NOTES/TIPS/COMMENTS:	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) All information requested on the questionnaire must be completed to provide pricing. 3) Engage your BP Channel Rep or zSeries Offering Owner for questions regarding this offering.	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) All information requested on the questionnaire must be completed to provide pricing. 3) Engage your BP Channel Rep, SWS Channel Rep or CTS Offering Owner for questions regarding this offering.	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) All information requested on the questionnaire must be completed to provide pricing. 3) Engage the SME listed in the form for the product you are quoting or your SWS Channel Rep for questions regarding these offerings.	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) All information requested on the questionnaire must be completed to provide pricing. 3) Engage the SME listed in the form for the product you are quoting or your SWS Channel Rep for questions regarding these offerings.
COL REGISTRATION TYPE:	Special Bid Registration	Special Bid Registration	Special Bid Registration	Special Bid Registration

TYPE OF BP REQUEST:	zSeries 24x7x2 Warranty Service Upgrade	Used Feature Coverage on Warranty Machine
WHEN TO USE:	To request pricing for zSeries 24x7x2 hour warranty service upgrade (zWSU)	To request pricing for used features being installed in a machine that is on warranty
COL SUPPLIER ORG:	Special Bid Quote and Waiver Requests	Special Bid Quote and Waiver Requests
COL TRANSACTION TYPE:	zWSU Pricing Request *	Used Feature Coverage Option *
COL DOCUMENT FLOW:	zWSU Pricing Request *	BP Non-Standard Offering Requests *
WHAT TO SUBMIT:	ISAT HTML file set up with proper coverage dates and including the "NON-STAND SOW-HARDW SVC" offering. This offering will NOT generate a price and requires submission to BPSOS to have price applied.	BP Non-Std SB Offering Support Request Questionnaire with the "Start Here" and "Used Feature Coverage Option" tabs completed and an ISAT HTML file containing the "USED FEATURE COVERAGE OPTION" set up with appropriate dates.
NOTES/TIPS/COMMENTS:	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) Coverage date for zWSU should not exceed the warranty end date of the machine.	1) This offering requires a manual price be applied in ISAT by the BPSOS team. Submissions for registration without pricing applied will be pending. 2) Offering must have an "effective to" date equal to the base machine's warranty end date. 3) Post warranty charges will price directly from ISAT as part of base machine.
COL REGISTRATION TYPE:	Special Bid Registration	Special Bid Registration

BP Special Programs (Announcement specific): For BP Special Programs to be announced via Channel Communications letters. Each program is different, so be sure to review eligibility and submission requirements for the specific program you are submitting under. Requests will be submitted in the Special Bid Quote and Waiver Requests supplier organization and the transaction type/document flow will be outlined in specific program announcement.

*** NOTE REGARDING TRANSACTION TYPE AND DOCUMENT FLOW LABELS *** Some Transaction Type and/or Document Flow labels may contain a year annotation that has not been included in the description above. This annotation is for IBM use only to determine last date of change to the type or flow, you should not have multiple selections with different years. If you have questions or cannot find a Transaction Type or Document Flow listed please contact Dan Eades, Liz Polchin or Maria Scotto di Carlo

REMINDEERS:
 The most current version of forms and reference documents may be found in the Document Library on PartnerWorld. To access click on "BP Special Bid Forms and Process Docs"
 Distributors/BPs should contact their IBM Buiness Partner Channel Sales Representative for assistance or with questions