

Business Partner Instructions to Quote IBM Customer Number – entitled Software Maintenance via ISAT

When a client requests a renewal quote for an IBM customer number-entitled software maintenance offering, please follow this process.

1. First, the end user customer must provide to the partner (SP1 or T2) their IBM customer number(s) associated with the service/entitlement, or the hardware machine type/serial number associated with the original software order.
2. Using the information provided by the end user customer, the partner will then research via Inventory Services. Specifically, verification is needed that the client has existing SWMA registration PID(s) for the given service being quoted associated with the given product, i.e. ProtecTIER Enterprise Edition versus ProtecTIER Appliance Edition, or any other Customer Number entitled offering.
 - a. If through Inventory Services research it is confirmed that the client has existing SWMA registration PIDs for the offering being quoted in ISAT, proceed to quote.
 - b. In the event that i) there are no existing SWMA registration PIDs under the given customer number where the client is stating they have the SWMA service, **or** ii) the Customer Number provided by the customer is outside of the partner's enterprise, these will require special handling.
 - c. The Business partner must send to the customer the form: [IBM Customer Approval for Release of Confidential Information](#), which shall be used as authorization for said partner to solicit their end user customer data/information from IBM. Specifically, the customer's Authorized Approver should be the company director or someone with that level of authority. Approvals from an email note will no longer be allowed. This is to adhere to and be compliant with the IBM audit policies. Please note that this approval is good for a 2 year period. The letter can be found in PartnerWorld: URL: <https://www.ibm.com/partnerworld/services/channel-support>
The document is found under Forms → Pre-sales.
 - d.
3. With the end user's email authorization, the partner will then engage the Sales Data Support Request via COL and provide, along with the customer's email authorization, the customer's enterprise number and/or affiliate number, asking that a list of customer numbers associated with the SWMA offering(PIDs 5639) be provided by the STATCHECK team to the partner.

NOTE:

- **[For end-user Enterprise wide or Affiliate search, please select the Sales Data Support Request option.](#)**

The screenshot shows a web form with a dropdown menu for 'Transaction type'. The dropdown is open, showing four options: 'Sales Data Support Request', '- Transaction type -', 'Sales Data Support Request', and 'StatCheck Only'. The 'Sales Data Support Request' option is highlighted. Below the dropdown is a 'Continue' button. To the right of the dropdown is a document icon with a 'W' on it, labeled 'LOA for CN SWMA Driven'.

- **[For a report for BP Enterprise wide only, please select the StatCheck Only option.](#)**

4. If the customer number(s) listed on the report are outside of the inquiring partner's enterprise, then the partner will need to engage the ISAT level 1 team via an ISAT issue log with the enduser's authorization to have the Customer number entitled SWMA offering(s) added to the proposal with the customer number(s) provided.

Note:

If the customer number is owned by another Business Partner, it cannot be added to the new business partner proposal without the owning business partner's concurrence and end user

customer's authorization. The authorization must be included with the ISAT Level 1 issue log request

5. Once the Customer number entitled SWMA offering has been added to the proposal with the customer number(s) provided to Level 1, the partner can then precede business as usual: quote to customer and send to their T2/customer for review.
6. At time of registration, the Customer Approval Letter must be attached to the contract package. COL requests that have been submitted without the appropriate Approval Letter will be placed in pended status until the letter has been attached.

NOTE:

This process is to be followed when submitting for registration of New and/or Renewal created contracts.