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Quick Reference Card Overview

What is the purpose of the BPSB Spreadsheet Template and what is it used for?

The Template will enable Business Partner sellers to model pricing prior to request submittal to IBM channel teams for special pricing consideration. Enhanced functionality within this template will help to speed the sales cycle when additional discounting may be needed to secure an opportunity.

Who is authorized to use this template form?

IBM authorized Business Partner Remarketer Firms – Distributors, Tier 1/ SP1, and Tier 2/SP2 Business Partners.

How do I report a technical issue?

Please submit the failing BPSB template and the ODS file for review via COL transaction type "BPSB Input Template Support".

Tier 2 /SP2 & Tier 1 BP Instructions

Tab #1 – General Information - Provide Customer & Partner Background Information

The screenshot shows the 'Business Partner Request Input Form'. It is divided into several sections: 'Transaction Data', 'Proposal and Inventory Information', and 'Hardware Maintenance'. The 'Transaction Data' section includes fields for Today's Date, End User/Customer Name, Address, Contact Name, and various IDs. The 'Proposal and Inventory Information' section includes fields for Proposed Start Date, Proposed Term, and Proposed Billing Cycle. The 'Hardware Maintenance' section includes fields for Machine Type, Model, and End User. There are buttons for 'Import ODS', 'Clear File', and 'Remove ODS'. A yellow highlight is on the 'Import ODS' button, and a red arrow points to the 'Remove ODS' button. A note at the bottom says 'PLEASE PROVIDE COMMENTS BELOW REGARDING ASSOCIATED H/WARRANTY COVERAGE'.

Begin by clicking Button - "Import ISAT Export ODS File"

- a. Yellow fields will be populated from the imported ODS file, gray fields must be manually populated by user
- b. Fields with an arrow to the right have a selectable menu

This Tab provides additional optional functionality:

- a. "Remove ISAT" button should be used to remove current ISAT information from file prior to importing a new ODS file.
- b. "Clear File" button can be used to clear all data (ISAT + manually entered responses).

Please Note: Required fields will be marked red arrow within left margins. Any red arrows left will lead to validation error.

Once required fields have been entered, Move to Tab #2

Tab #2 – BPSB Request Information Tab

- a. Fields with an arrow within the margins to the right have a selectable menu
- b. Comment fields are optional to allow for additional pertinent detail.

Once required fields have been entered, and no visible red arrows remaining in left margins -- Move to Tab #3

Tab #3 – Pricing Request Tab - Provide price / discount specific requests

The screenshot shows the 'Pricing/Discounting Request' form. It features a table with columns: Reference Line, Item, Reference Line Description, Item Description, Requested Discount, and Requested End User Price. The table contains several rows of data, including 'Hardware Maintenance' and 'Machine Type'. There are buttons for 'Import ODS' and 'Clear File'. A yellow highlight is on the 'Import ODS' button, and a red arrow points to the 'Clear File' button. A note at the bottom says 'PLEASE PROVIDE COMMENTS BELOW REGARDING ASSOCIATED H/WARRANTY COVERAGE'.

This Tab is populated based on Step 1.A (import ODS)

Requestor can enter a total End User Price or Total End User Discount via the Requested Discount window that pops up when you go the tab or when you click on the "Requested End User Disc" button. **Please Note:** The template is programmed by default to optimize discounting in an effort to produce "green" level discounting.

Requestor has ability to turn off optimization by unchecking "Optimize Line Items to Overall" at the top right. (not recommended)

Requestor may also enter an override discount at the category level (Hardware Maintenance, Warranty Service Upgrade, Hard Drive Retention and/or Software Support Services) -or- line item level (Machine Type or SW Svcs. offering level). The estimated End User price being requested will be reflected.

Once required fields have been entered, Move to Tab #4

Tab #4 – ALF Discount Form - (if required) Provide information required to request ALF discounting

This Tab is populated based on Step 1.A (import ODS) and Step 3 (pricing request), if ALF discounting is included, the Requestor can enter a total ALF discount in the Target Discount field to override information entered on Step 3.

Once required fields have been entered, Move to Tab #5

Tab #5 – Certification Tab
- Requestor certifies Special Bid Template

SOLUTION PROVIDER - TIER 2 BUSINESS PARTNER (SP2) CERTIFICATION	
This section should be completed only by Solution Provider - Tier 2 Business Partner	
x [By entering "x" and completing this form, I certify on behalf of my firm that we have met the criteria as outlined, that my firm understands and agrees that IBM's decision to provide any additional product discounts and/or allowable margin enhancements is based on these materials and that I understand that my failure to provide truthful and accurate information in this form entitles IBM to recapture any additional discount or margin allowance and/or take any other action authorized under the IBM Business Partner Agreement.]	
Solution Provider - Tier 2 Requestor Name:	X
Solution Provider - Tier 2 Requestor Title:	X
Solution Provider - Tier 2 Requestor e-mail address:	X
Solution Provider - Tier 2 Requestor Phone Number:	X

Enter Requestor Information either in the Solution Provider - Tier 2 Business Partner (SP2) or Distributor or Solution Provider - Tier 1 Business Partner (SP1) area, as appropriate for current template user.

Please Note: Tier 2 / Tier 1 Requestor must enter an "x" accepting the terms and conditions, -or- risk having the request returned for completion of the Certification tab.

Once Certification Tab completed, Return to Tab #1

Tab #1 – General Information
- Confirm all fields entered click Validate Forms Button

Business Partner Request Input Form	
2/4/2019	
PARENTCO123	
ABC Parent Company	
Liz Watson	

Import IBAT
Export ODS File

Validate Forms

List all names client may be known as

Click on Validate Forms Button to check that all required fields have been entered. Any fields identified in the validation process must be completed before next steps.

--- End of SP 2 Instructions ---
--- Tier 1 proceed to Distributor Instructions ---

Distributor BP Instructions (Tier 1 Continued)

Distributor should review tabs information received from SP2 for accuracy and completeness

Disty Tier 1 Worksheet – Tab
- To open tab, Distributor / Tier 1 must click the button titled "Distributor T1 Processing" on the #1. General Info tab then enter ID and password to open Disty T1 tabs

Pricing / Discounting Request		Override		Approved	
Reference End User	Calculated Discount	Requested End User	Reference BP	BP Charges @ Req End User Amt	Margin Uplift %
Overall Total:	\$ 3,985,771.00	#N/A	\$ 3,070,502.53	\$ 3,070,502.53	N/A
Non-discounted line items:	\$ 107,824.68	0.000%	\$ 107,824.68	\$ 3,070,502.53	N/A
Overlays excluded from NTE Pricing:	\$ -	\$ -	\$ -	\$ -	\$ -
Total Discounted line items:	\$ 3,881,946.32	#N/A	\$ -	\$ -	\$ -
Hardware Maintenance:	\$ 1,954,352.47	#N/A	\$ -	\$ -	\$ -
Warranty Service Upgrade:	\$ -	\$ -	\$ -	\$ -	\$ -
Hard Drive Retention:	\$ -	\$ -	\$ -	\$ -	\$ -
Software Support Services:	\$ 1,927,593.85	15.000%	\$ 1,630,154.73	\$ -	\$ -

This Tab is populated based on imported ODS and data from 3. Pricing Request tab (if pre-population is requested). If Disty/T1 user would like to compare different pricing models or make modifications, they can click on the "Requested End User Disc" button and enter a total End User Price or Total End User Discount on the Requested Discount window that pops up. Note that changes made on this worksheet will not affect values entered on #3 Pricing Request tab.

Requestor has ability to turn off optimization by unchecking "Optimize Line Items to Overall" at the top right. (not recommended)

Requestor may also enter an override discount at the *category level* (Hardware Maintenance, Warranty Service Upgrade, Hard Drive Retention and/or Software Support Services) -or- *line item level* (Machine Type or SW Svcs. offering level). The estimated End User price being requested will be reflected.

If there is a Red Delegation level condition caused by applied discounting, the Requestor can attempt to bring into Green Delegation Level by clicking the Go Green button.

If interested in exporting the pricing model that was created you may move to BP Worksheet Tab. Otherwise, you may proceed to Certification Tab.

BP Worksheet - Tab
- Provide Green Delegation price / discount in export format

This Tab is populated based on import ODS and data from "Disty T1" tab.

Please Note: Distributor may export the tab information to provide alternate price modeling scenarios to their SP2 if the request is within Green Delegation Level.

Tab #5 – Certification Tab
- Distributor/Tier 1 certifies Special Bid Template

DISTRIBUTOR OR SOLUTION PROVIDER - TIER 1 BUSINESS PARTNER (SP1) CERTIFICATION	
This section should be completed only by Distributor or Solution Provider - Tier 1 Business Partners, not by Tier 2 Business Partners	
x [By entering "x" and completing this form, I certify on behalf of my firm that we have met the criteria as outlined, that my firm understands and agrees that IBM's decision to provide any additional product discounts and/or allowable margin enhancements is based on these materials and that I understand that my failure to provide truthful and accurate information in this form entitles IBM to recapture any additional discount or margin allowance and/or take any other action authorized under the IBM Business Partner Agreement.]	
Distributor or SP1 Requestor Name:	X
Distributor or SP1 Requestor Title:	X
Distributor or SP1 Requestor e-mail address:	X
Distributor or SP1 Requestor Phone Number:	X

Enter Requestor Information in the Distributor / Solution Provider - Tier 1 Business Partner (SP1) area. Requestor must enter an "x" accepting the terms and conditions.

Please Note: Distributor must enter an "x" accepting the terms and conditions, -or- risk having the request returned for completion of the Certification tab.
Once certifying information has been entered, Return to Tab #1

Tab #1 – General Information
- Confirm all fields entered click Validate Forms Button

Business Partner Request Input Form	
2/4/2019	
PARENTCO123	
ABC Parent Company	
Liz Watson	

Import IBAT
Export ODS File

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List all names client may be known as

Click on Validate Forms Button to check that all required fields have been entered. Any fields identified in the validation process must be completed before next steps.

---- End of Distributor Instructions ----