



IBM BUSINESS PARTNER SPECIAL BID ADMINISTRATOR GUIDE

For IBM Distributor & Business Partner Use

Version 5r1

March 2019

The purpose of this guide is to assist IBM Authorized Distributors and Business Partners in preparing submissions of special bid requests for consideration and processing by the IBM Business Partner Sales Operations Support Special Bid team. The guide has been updated to include steps required for the submission of and files/documents required for various types of special bid requests.

Please contact your IBM Channel Services Sales Representative or refer to PartnerWorld for questions regarding BP Special Bids criteria, eligibility and current versions of any required forms.

IBM Business Partner Sales Operations Support Special Bid Representatives:

Maria Scotto di Carlo - Team Leader

mariam@us.ibm.com

Amanda Caetano Nogueira – Ingram Micro & T1 BPs

amcaet@br.ibm.com

Hilarie Hartung – Arrow Electronics

hhartung@us.ibm.com

Melanie Eskridge – Tech Data Corp

eskridge@us.ibm.com

Please refer to specific application user guides for any questions pertaining to use of the ISAT tool or Contracts OnLine. Instructions for the BPSB Input Spreadsheet can be found on the “Template Instructions” tab of that template workbook. Current versions of all templates, workbooks or input forms may be found on PartnerWorld.

1 Table of Contents

| | |
|---|-----------|
| 1 Table of Contents | 3 |
| 2 BP Special Bid Type Matrix | 4 |
| 3 BP Special Bid (TEP) for HWMA or Services | 6 |
| 3.1 Preparing ISAT Files for a NEW TEP SB Submission | 6 |
| 3.2 Preparing ISAT Files for an ADD TO TEP SB Submission | 7 |
| 3.2.1 Adding machine types/models that are already on the existing contract | 7 |
| 3.2.2 Adding a new model of a machine type already on the existing contract | 8 |
| 3.2.3 Adding new machine types/models or offerings and no discounts are being requested on the merging content | 8 |
| 3.2.4 Adding new machine types/models or offerings and discounts are being requested on the merging content | 8 |
| 3.3 Completing the BPSB Input Spreadsheet | 10 |
| 3.4 Submitting your request | 10 |
| 4 Multiple Vendor Service (MVS), Enhanced Parts Inventory (Parts Locker) Plug-a-Price offering or non-standard offerings | 11 |

2 BP Special Bid Type Matrix

This matrix represents various BP special bid types and brief submission criteria.

| | | | | |
|-------------------------------|--|---|---|---|
| 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 charges 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 2017 | ALF Waiver Request | Enhanced SW Base Charge Removal |
| COL DOCUMENT FLOW: | XX New SB 2018 (XX=AVT, Dist or SP) | XX Add to SB 2018 (XX=Dist or SP) | ALF or Parts Locker 2018 (SP if appropriate) | Enhanced SW Base Charge Removal 2018 |
| 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 proposal files 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 | 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 2018 (SP if appropriate) | DRISC Quote 2018 (Dist or SP) |
| WHAT TO SUBMIT: | End of Service Template & ISAT proposal containing the "End of Service for BP" 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 its 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: | End of Service | 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 2018 (SP if appropriate) | DRISC Quote 2018 (Dist or SP) |
| WHAT TO SUBMIT: | End of Service Template & ISAT proposal containing the "End of Service for BP" 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 its 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 pseudo 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 proposal created for renewal purposes using the "Create Renewal" function in ISAT. | BPSB Input Template populated with the ISAT QDS file in which you experienced issues, the QDS file you imported and print screens of the issues encountered with details as to the actions you were taking. |
| NOTES/TIPS/COMMENTS: | 1) Include all features and quantities on the latest form available in the Document Library on PartnerWorld. 2) BPSOS will return approval with IBM pseudo MTNIs if it can be supported. | 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. | 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. | 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 QDS 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 |

| BP Non-Standard Offering Requests | | | | |
|-----------------------------------|---|--|--|--|
| TYPE OF BP REQUEST: | 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 proposal containing the "SOFTWAREXCEL ENT z SVS 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 proposal 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 proposal 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 proposal 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 proposal 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 proposal 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.

REMEMINDERS:

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 Business Partner Channel Sales Representative for assistance or with questions

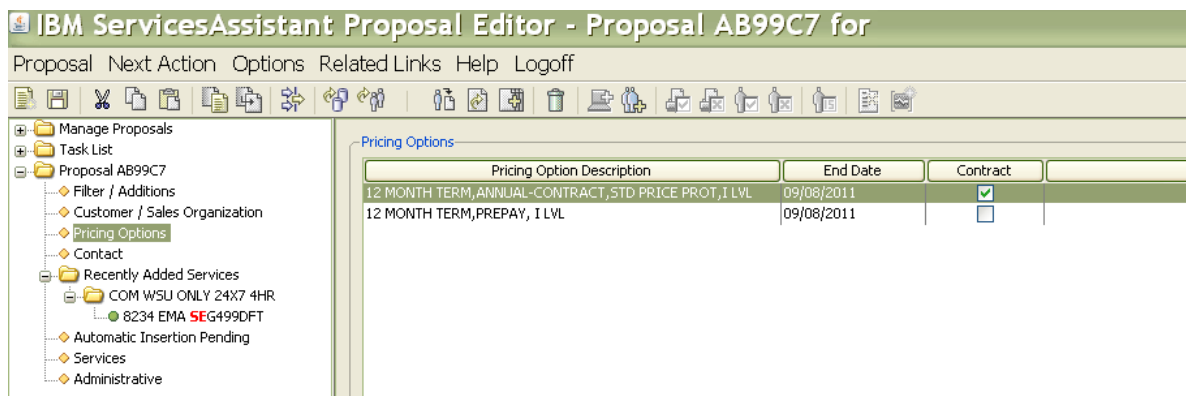
3 BP Special Bid (TEP) for HWMA or Services

BP Special Bid (TEP) for HWMA or Services should be utilized for new or renewal opportunities and additions to contracts that require pricing beyond what may be achieved via BP standard discounts. Requirements may be found on the “BPSB Qualifications” tab of the BPSB Input Spreadsheet. Please review them prior to submission to ensure the opportunity is qualified.

3.1 Preparing ISAT Proposal Files for a NEW BP Special Bid Submission

The pricing tool that is used by the IBM TSS Pricing organization requires ISAT outputs (IBM Services Solution Summary) created with Annual Billing and Standard Price Protection option.

In order for the IBM BPSOS SB team to prepare files needed for our pricing team, an Annual, Standard Price Protection billing option must be included on any proposal being submitted for BP Special Bid TEP consideration. User must add XX MONTH,ANNUAL-CONTRACT,STD PRICE PROT,I LVL (where XX is the longest term being quoted) pricing option even if it is not an option that is being presented to the client. This is a change in prior process, Distributors/BPs will no longer need to submit ISAT XML files. Please refer to the ISAT User Guide for guidance on adding multiple pricing options. See example below:



The screenshot displays the IBM ServicesAssistant Proposal Editor interface for proposal AB99C7. The main window shows a table of pricing options. The table has columns for Pricing Option Description, End Date, and Contract. Two options are listed: '12 MONTH TERM,ANNUAL-CONTRACT,STD PRICE PROT,I LVL' and '12 MONTH TERM,PREPAY, I LVL'. The first option has a checked checkbox in the Contract column, while the second has an unchecked checkbox.

| Pricing Option Description | End Date | Contract |
|--|------------|-------------------------------------|
| 12 MONTH TERM,ANNUAL-CONTRACT,STD PRICE PROT,I LVL | 09/08/2011 | <input checked="" type="checkbox"/> |
| 12 MONTH TERM,PREPAY, I LVL | 09/08/2011 | <input type="checkbox"/> |

3.2 Preparing ISAT Files for Adds to Existing BP Special Bid Contract

When creating an add to an existing contract that includes machine types or offerings that are discounted on the contract, the request must be reviewed by the BPSOS team. Additions of like machine types/models or offerings that already exist on the special bid contract will be reviewed to ensure discounts are properly applied. If discounts are being requested on new machine types or other contract components (HWMA or SWMA/RTS) the request must be reviewed for new pricing approvals. Additions of new machine types/models where discounts are not being requested do not have to be reviewed by this team prior to submission for contract registration.

There are different file requirements for adds to existing contracts which are dependent upon a few factors. The first is whether the new content being added is a machine type/model or offering that is already on the existing contract with/without discounts applied. The next is whether the content is completely new to the contract and discounts are being requested.

- If you are adding the same machine type and model or offering that is already on the existing contract with discounts refer to section 3.2.1.
- If you are adding a new model of a machine that is already on the existing contract with discounts refer to section 3.2.2.
- If you are adding a new machine type/model or offering that is not on the contract or adding a machine type/model or offering that is already on the contract without discounts and are not requesting discounts refer to section 3.2.3.
- If you are adding new machine types/models or offerings that are not on the existing contract and discounts are being requested refer to section 3.2.4

3.2.1 The add-to proposal contains machine types and models that are already on the existing contract

If the content you are requesting to be added to an existing contract has already been approved for discounting (i.e. is on an existing TEP contract) only one file is required. The BPSOS SB will review the proposal and ensure discounts have been pulled in upon proposal creation or will apply the approved discounts if necessary/applicable.

1. Create an “add to contract” ISAT proposal from the existing contract. The ISAT Services Solution Summary output file will show the existing TEP contract number in the “Associated contract number” in the General Information section of the output. Save this file for submission.
2. Grant IBM Access Control to this new “add-to” proposal.
3. Submit the request via Contracts OnLine using the Special Bid Add To type and select the “Add of MT already on contract” transaction type and attach the merge proposal, provide comments to BPSOS SB team and submit.

NOTE: A new BP Special Bid (TEP) request form is not needed if the Machine Types/Models or services offerings are the same as what is on the existing TEP contract

3.2.2 The add-to proposal contains new model(s) of a machine type that is already on the existing contract

Pricing approvals may no longer enable a new model of a previously approved machine type being added to an existing BP Special Bid (TEP) to receive previously approved discounts. These may often need to be treated as a new machine type. Follow the same steps as a new machine type/model in section 3.2.4.

3.2.3 The add-to proposal contains new machine types/ models or offerings that are not already on the existing contract, but no discounts are being requested on the merging content

If new machine types/models or offerings are being added that are not on the contract or you are adding machine types/models or offerings that are already on the contract without discounts and are not requesting discounts the BPSOS does not have to review the proposal. You may process the request business as usual.

3.2.4 The add-to proposal contains new machine types/models that are not already on the existing contract and discounts are being requested on the merging content

When new machine types/models or offerings are being added to an existing contract and discounts are being requested, either two or three files will be needed for processing, depending on whether the existing contract is prepay or any other billing type. In addition, a BPSB Input Spreadsheet must be completed and submitted specifying the target price to the End User, as well as the reason BP Special Bid (TEP) discounting is needed for this new content, very much like it is required on the New SB request. The two pricing scenarios follow:

1. If the existing contract is a Prepay contract, two (2) ISAT files are required, in addition to the BPSB Input Spreadsheet.
 - a. The “add to contract” IBM Services Solution Summary ISAT output file for a Prepay billing option created from the existing BP Special



Bid (TEP) contract (HTML#1). Create an “add to contract” ISAT proposal from the existing TEP contract and include all new machines and offerings. The ISAT Services Solution Summary output file will show the existing contract number in the “Associated contract number” in the General Information section of the output. Save this file to attach to your submission via COL.

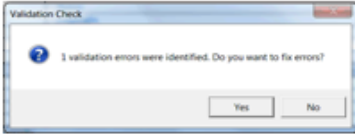
- b. A second ISAT file will be needed for submission to IBM TSS Pricing that does not have Prepay billing. Create a standalone ISAT proposal file containing **only** the **new** machine types/models or offerings to be added with an Annual billing, Standard Price Protection billing option (HTML #2). It is important that you do not include any previously approved machine types/models or offerings that are already on the existing contract, the only exception would be the Hard Drive Retention or Flash Memory Retention offerings. If the Hard Drive Retention or Flash Memory Retention offering is being added for a new machine/type model, it must be added for the associated machine type/model it is being quoted on. This standalone proposal should have the same contract start/stop dates and term as the existing contract, but should have the service effective dates set to match the actual dates on the “real” merge quote. The ISAT Services Solution Summary output file will show the existing contract number in the “Associated contract number” in the General Information section of the output. Save this file to attach to your submission via COL.
 - c. Complete the BPSB Input Spreadsheet and submit it along with the two ISAT files via Contracts OnLine type Special Bid Add To and select the “New machine type, requesting discounts” transaction type.
2. If the existing contract is a recurring billing type only one (1) ISAT file is required, in addition to the BPSB Input Spreadsheet.
- a. The “add to contract” IBM Services Solution Summary ISAT output file for the recurring billing option created from the existing BP Special Bid (TEP) contract (HTML#1). Create an “add to contract” ISAT proposal from the existing TEP contract and include all new machines and offerings. The ISAT Services Solution Summary output file will show the existing contract number in the “Associated contract number” in the General Information section of the output. Save this file to attach to your submission via COL.

Complete the BPSB Input Spreadsheet and submit it along with the one ISAT file via Contracts OnLine type Special Bid Add To and select the “New machine type, requesting discounts” transaction type.

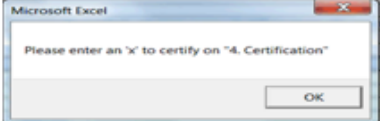
3.3 Completing the BPSB Input Spreadsheet

The BPSB Input Spreadsheet is an important part of special bid submissions. The information provided is used by TSS management, BPSOS Specialists and TSS pricing to process special bid requests. It important that it is complete and accurate.

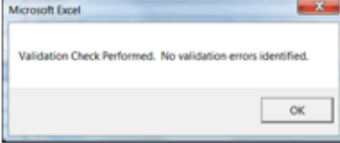
1. Version counts! Down level versions may have “bugs” that were fixed in the current version.
2. All required fields have a red arrow in the left margin →. Once all required information has been entered the user must click on the  button. This will perform checks to ensure there is no missing required data. If data is missing user will receive a pop-up like this after clicking on the  button:




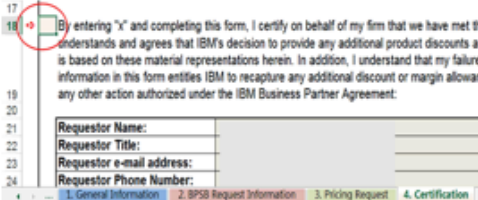
When user clicks Yes, the next box Shows where the Omission is




Now when the user clicks OK the tool will take user to the field



After the omission is corrected the user can click on the  button again and continue until there are no further issues, then this box will come up:



3. Any submission forms with red arrows remaining or that do not return the “Validation Check Performed. No validation errors identified” message when the  button is clicked will be considered incomplete and will be returned to submitter, causing processing delays.
4. Discounts need to be entered in one of these sections, no more:



Hardware Included Services Included

Please note that discounting levels may be considered based on this request, but that final approved special bid discounting can vary and may differ from what is being requested depending upon the financial projections completed for the submitted inventory and discount levels.

Use this section when you are requesting a discount off the entire proposal and are attempting to meet a specific target price.

Use this section when you want to outline a specific % off reference and if you are requesting discounts only on particular categories of services like Hardware Maintenance only or Software Support Services.

Use this line when requesting a specific Percent off reference price for all components listed below the total

Use this section only when requesting different discounts by machine type/offering or when you are requesting discounts on only a subset of inventory

| REQUESTED DISCOUNTING SECTION | | | | | |
|-------------------------------|----------------------------|---------------------|--|----------------------------|--|
| | Requested End User Charges | Calculated Discount | | Requested End User Charges | |
| Calculate Overall Discount | \$ 100,000.00 | 25.960% | | | |
| Overall Total | \$ 135,062.10 | | | \$ 135,062.10 | |
| Hardware Maintenance | \$ 93,513.42 | | | \$ 93,513.42 | |
| Warranty Service Upgrade | \$ - | | | \$ - | |
| Hard Drive Retention | \$ - | | | \$ - | |
| Software Support Services | \$ 41,548.68 | | | \$ 41,548.68 | |

| LINE ITEM DETAIL | | | | | |
|--------------------------------|--------------|----------|----------------------------|--------------------|----------------------------|
| Hardware Maintenance | Machine Type | Mod/Feat | Reference End User Charges | Requested Discount | Requested End User Charges |
| TAPE FRAME | 3952 | F05 | \$ 549.92 | | \$ 549.92 |
| TS7720 CACHE CONTROLLER | 3056 | C09 | \$ 13,055.06 | | \$ 13,055.06 |
| TS7720 VIRTUALIZ ENGINE SERVER | 3057 | VEB | \$ 79,908.44 | | \$ 79,908.44 |

3.4 Submitting your request

All requests should be submitted via COL via the appropriate transaction type and document flow. Please refer to the BP Special Bid Type Matrix to verify type, flow and documents to be submitted.

4 Multiple Vendor Service (MVS), Enhanced Parts Inventory (Parts Locker) and other “Plug-a-Price” or non-standard offerings

There are several offerings that are “plug-a-price”, meaning ISAT will allow the user to add an offering that does not have pre-loaded pricing in ISAT/CHIS. Pricing for these types of offerings must be applied manually by the BPSOS in order for the offering to be valid. ISAT provides some instruction and pre-requisite information when the offering is added to the proposal and will also post warning notifiers alerting the ISAT user that the price is missing. Proposals containing these types of offerings must have pricing applied to the offering or it will not be accepted for contract registration. Refer to Business Partner Special Bid Submission Matrix and offering specific process documents on PartnerWorld for step by step submission instructions for these offerings.