

# Doing Business With IBM

A guide for Daeja customers in North America



## *Welcome to IBM!*

On September 19, 2013, IBM announced it has acquired Daeja Image Systems Ltd. (“Daeja”), a leading provider of software that makes it easier for business and IT professionals to view large documents and images.

Beginning April 1, 2014, Daeja will be conducting business as IBM.

The following “Doing Business with IBM” guide describes changes to expect and actions needed to maximize the benefits of your relationship with IBM. It will also help to ensure a smooth transition to IBM’s business systems and processes.

As a customer of IBM, you will continue to have access to Daeja offerings, now under the IBM brand, as well as the extensive IBM portfolio of software solutions and services offerings, while enjoying the high-quality, responsive service you have come to expect from both Daeja and IBM.

We anticipate that you and your organization will experience a smooth transition to IBM over the next several months. During this process, the IBM team and your IBM Daeja representatives are available to answer any questions and to address your ongoing software needs.

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*Please watch for a letter from IBM containing important information and key actions including:*

- Your IBM Customer Number
- Your Software Site Number
- Software and services tool and registration
- Software subscription and support

## 1. Important actions for Daeja customers

### ***Create an IBM profile***

***Your company's Primary Contact will need to create an IBM profile***

With an IBM profile, you can view, update or add personal contact details, job title or registration settings.

Create or update your IBM profile here: <https://www.ibm.com/account/profile/us>

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### ***Create an IBM Registration***

***Your company's Primary Contact will need to create an IBM Registration***

Your IBM Registration ID, also known as an IBM ID, is your single point of access to IBM web applications that use IBM Registration.

You need just one IBM ID and one password to access any IBM Registration based application.

Create or update your IBM Registration here: <https://www.ibm.com/account/profile/us?page=reg>

*Please note there may be a delay of up to 15 minutes before you will be able to use your new IBM ID.*

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### ***Need assistance?***

For additional information and guidance on setting up your IBM profile and IBM Registration ID, consult our FAQ page here: <https://www.ibm.com/account/profile/us?page=faqhelp>

Alternatively, you may contact the Worldwide IBM Registration Helpdesk at the following link: <https://www.ibm.com/account/profile/us?page=helpdesk>

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## 2. Accounts Payable and Purchasing

Effective April 1, 2014, Daeja accounts payable and purchasing processes will migrate to IBM processes.

### *Important changes in Accounts Payable and Purchasing*

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#### **Tax ID Exemption Certificates and Change Requirements**

Vendor applicable Tax Identification Number will change.

If you are currently exempt from Sales and Use tax, or local VAT, you will need to issue your company's Tax Exemption Certificates to IBM with your first order after April 1, 2014.

\* **Blank tax forms are available on applicable State websites.**

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#### **Vendor name**

Vendor name will change from Daeja to the applicable local/regional IBM operation covering your location (the term “Vendor” below represents the applicable IBM entity).

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#### **Vendor remit-to addresses**

Vendor remit-to addresses for checks, wire transfers and overnight payments will change for all new business after April 1, 2014.

The new details will appear on your invoices issued from IBM after that date.

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#### **Vendor standard payment terms**

In most countries, Vendor standard payment terms of “due upon receipt” may be applicable. You can find this information on either your invoice or quote.

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#### **Currency**

In some countries, the currencies used by Daeja are different than those used by IBM, thus you may be transacting in a different currency with IBM.

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#### **Languages**

In some countries, the correspondence you will receive from IBM may be in the local language.

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**Customer numbers**

Effective April 1, 2014, Daeja customers will be assigned an IBM Customer Number (ICN). In the weeks following April 1st, you will receive your ICN in a welcome letter from IBM. Please note that your ICN will be used with all order-related communications.

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**Purchase documentation**

All purchase documentation, such as invoices, will be sent to the contact(s) listed in the IBM profile associated with your ICN unless specified otherwise in your order

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**Part numbers and product descriptions**

New part numbers and product descriptions for the IBM Daeja portfolio will replace the pre-existing Daeja product descriptions.

These new part numbers and descriptions will appear on quotes and invoices you may receive from IBM.

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**Document formats**

The format of documents (quotes, services statements of work, invoices, etc.) you receive will change in format after April 1, 2014, and they will be issued from an IBM location as appropriate. This may affect the remit-to address, and in certain countries, the transaction currency that you are using today.

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**PO requirements**

If your company requires issuing a purchase order (PO) to facilitate payment for goods or services, IBM may require a new PO. Contact your IBM Daeja representative with any questions.

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**New licensing process**

IBM Daeja offerings are governed by license agreements which can be found here: <http://www-03.ibm.com/software/sla/sladb.nsf/search/>.

*Note: your legacy contract continues to apply to your existing software until such time as you move to the IBM license agreement*

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**Migration to new pricing metrics**

Coming into IBM, your active product entitlements will be moved to IBM systems. At that time, your sales representative will be available to explain your entitlement grant as well as answer questions about any changes to the charge metrics of the offerings.

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## 3. Software Support

Daeja Support offerings will be transitioned to IBM support beginning April 1, 2014 and supported by the IBM Daeja Support team. The IBM Daeja Support team will continue to focus on delivering customer satisfaction without compromise.

As we work to integrate Daeja and IBM Support, we will offer IBM Daeja customers expanded capabilities through the existing IBM Support infrastructure. For the most current information on the IBM Daeja Technical Support transition, visit <http://www-01.ibm.com/software/ecm/daeja/support/> for the latest updates. This site is also an excellent source of information for those new to IBM Support.

To receive support for Daeja products, a client must have a Subscription and Support maintenance agreement for Daeja products with IBM or have an existing active Daeja maintenance contract.

IBM anticipates that the full support transition will be completed by July 1, 2014.

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### **What does not change on April 1, 2014**

Support is provided per your existing Daeja Support agreements. Contact support at [daejasup@us.ibm.com](mailto:daejasup@us.ibm.com)

As part of the transition into IBM Support, Daeja will be contacting you to validate the correct Primary and Site Technical Contacts

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*Below are informational highlights to help you understand the definition of those future roles in IBM Customer Support.*

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### **Primary Contact**

The **Primary Contact** is a specific individual who will manage access to the IBM Download Site for their organization's IBM Daeja software contract(s). The Primary Contact approves IBM Download Site access requests from their organization and will receive all download account management and communications. This person will also be the primary contact for annual support renewal invoices for IBM Daeja software at your organization. Note: If a Primary Contact is not designated, the Site Technical Contact will be used for both roles.

Only a **single** Primary Contact can be designated per company in the IBM systems.

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### **Site Technical Contact**

The **Site Technical Contact** is a specific individual from the customer's company who will manage access to IBM's Technical Support services and grant the authority to open Technical Support Requests on behalf of their organization. The Site Technical Contact approves IBM Support access requests from their organization's employees and business partners and will receive all IBM Support access instructions and communications. More information regarding IBM Electronic Support can be found at <http://www-01.ibm.com/support/electronicssupport/workwithibm.html>.

Only a **single** Site Technical Contact can be designated per company in the IBM systems. Additional Named Callers can be added to the system by the Site Technical Contact.

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## 4. Software Subscription and Support Renewals

Daeja Support Renewals will be integrated into the IBM Software Subscription and Support Renewals process in a phased approach. Your Software Subscription and Support Renewal is determined by the date your current Daeja Support contract expires.

### *Renewal dates and actions*

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#### **Renewal date before April 1, 2014**

You should have received an email from your Daeja Renewal representative and you should have proceeded with confirming your renewal by your current renewal date or March 31, 2014, whichever is earlier, to ensure that there are no disruptions in service. Any renewals not confirmed by that date will be re-quoted under IBM's terms and conditions. If you have not yet received a notification, please contact your Daeja Renewal representative.

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#### **Renewal dates between April 1, 2014 and May 31, 2014**

If your renewal falls within these dates, you should have received an email from your Daeja Renewal representative with an opportunity to renew early. If you elect not to take advantage of this opportunity by March 31, 2014, you will be quoted through IBM processes in the geography in which you are located. Any orders received after that date will need to be addressed to IBM and will be subject to IBM's terms and conditions.

Invoicing, part numbers and payment terms will change to IBM standard conditions and the renewal end date will move out to the last day of the month. If you have not yet received a notification, please contact your Daeja Renewal representative.

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#### **Renewal date after June 1, 2014**

Your Software Subscription and Support Renewal quote will be generated from IBM systems and provided to you by your IBM Subscription and Support Renewal representative. This quote will be subject to standard IBM terms and conditions, and the renewal end date will move out to the last day of the month.

In the future, Software Subscription and Support Renewals will transition to IBM's Passport Advantage program. At that time, you will receive a notice to renew your Daeja Software Subscription and Support Renewal for your IBM Daeja products through IBM's Passport Advantage program. Notices will be generated from IBM systems and provided to you by your IBM Software Subscription and Support Renewal representative.

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## 5. Passport Advantage

IBM offers two license acquisition and Software Subscription and Support offerings — Passport Advantage (<http://www-01.ibm.com/software/lotus/passportadvantage/aboutpassport.html>) and Passport Advantage Express (<http://www-01.ibm.com/software/lotus/passportadvantage/aboutexpress.html>). Passport Advantage is designed for larger enterprises, while Passport Advantage Express is designed to meet the needs of medium-sized businesses.

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### Passport Advantage

Passport Advantage is IBM's comprehensive program for software license acquisition, Software Subscription and Support, IBM Appliances and IBM SaaS subscriptions. It is designed for larger enterprises that may have multiple sites. Passport Advantage gives you more opportunities to obtain better pricing for your volume purchases over time and is based on your Relationship Suggested Volume Price (RSVP) level.

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### Passport Advantage Express

Passport Advantage Express is designed for single-site, smaller enterprise businesses. It combines the full Passport Advantage product list with the simplicity of transaction-based acquisition. Passport Advantage Express does not require a relationship agreement— each transaction is subject to the terms and conditions effective at the time. There are no points and no aggregating— just a single price level. And with each new license acquisition, you get renewable Software Subscription and Support.

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After April 1, 2014, IBM Daeja products and support will be available under both Passport Advantage and Passport Advantage Express.

## *6. Privacy Policy*

As part of the acquisition, personal information may be transferred from Daeja to IBM. IBM's privacy policy may be viewed online at <http://www.ibm.com/privacy>.