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Introduction to the Sales Assistance Program

Overview

The IBM and Lotus Sales Assistance Program allows qualified Business Partner firms to be compensated for pre-installation marketing and sales efforts resulting in IBM and Lotus software (Program) sales. The Program can improve the profitability of Business Partners who perform pre-sales marketing and sales activities, which result in IBM or Lotus software Program sales. The Sales Assistance Program also provides a vehicle for program participants to be eligible to receive reimbursement for expenses associated with their investments in IBM or Lotus software Program sales and marketing activities.

To participate, you must either be an active member of the IBM Business Partner - Software Program or the Lotus Business Partner Program. IBM and Lotus Sales Assistance Program participants are customer-facing IBM Business Partners that earn compensation for convincing the end-user customer to acquire selected IBM or Lotus software Programs.

As a participant in the Program, you are expected to do some or all of the following:

- w Perform end-user needs analysis and Program demonstrations
- w Provide consulting studies and proposals
- w Develop implementation plans
- w Lead customer pilot or prototype efforts

In order to become a member of the Sales Assistance Program, you must first join PartnerWorld for Software and complete the online application form. (*Note: Establishing a Member Profile is required as part of the Membership Application process to join PartnerWorld for Software.*) Refer to the *How to Join PartnerWorld for Software* section for more information. Once a Business Partner of PartnerWorld for Software, you can then go to the Initiative section of the Profile Editor and select to join the Sales Assistance Program option. Refer to *How to Apply to the Sales Assistance Program* section for more information.

Getting Started

How to Use this User's Guide

The Sales Assistance Program User's Guide is organized into four major sections.

- w **Introduction** - This section provides an overview of the Sales Assistance Program.
- w **Getting Started** - In this section, you will find information about how to use this user's guide, access the PartnerWorld for Software Profile Editor website, and register for an ID and password.
- w **Applying to the Sales Assistance Program** - This section provides information on how to join as a PartnerWorld for Software Business Partner and then apply to the Sales Assistance Program.
- w **Viewing Pending Changes** - This section provides information on how to view the status on your pending changes.
- w **Requesting Additional Product Categories** - This section provides information on how to request approval for additional categories.
- w **Registering an Opportunity** - This section provides information on how to register an opportunity (i.e. project).
- w **Requesting Payment for an Opportunity** - This section provides information on how to request payment for an opportunity.
- w **Viewing Legacy Project Data** - This section provides information on how to view the Legacy project forms.

How to Register for an ID and Password

Before accessing the PartnerWorld for Software Profile Editor, you will need to register. Once you have registered, you can then use your user ID and password to access the Profile Editor. (**Note:** *Those who are responsible for updating the company's profile using the Profile Editor will need to go through this process, register for their own user ID and password, and will need to include the ID in the company's Business Partner profile.*)

To access the IBM self-registration Web site, complete the following steps:

1. Access your Web browser.
2. In the Address or Location bar, enter the following Internet address and press **Enter**:

<http://www.ibm.com/partnerworld>

This will take you to the PartnerWorld Home page.

3. From the PartnerWorld Home page, select the option to register. The IBM self-registration page appears.
4. At the IBM self-registration page, select the option to register for the first time and then follow the instructions that are provided.

Once you have registered at the IBM self-registration site, you can change your personal information, change your password, or request a new password. The registration site is the central location for individual user information, to be used throughout IBM Web sites. Registering will also allow you to have access to the IBM products and services, and any of the IBM Web applications that display the IBM registration icon.

***Note:** The IBM self-registration site personal data (e.g. Name) is not shared with other systems. The information is used for authentication and the data is not transferred to your profile.*

Using your new ID and password, go to the PartnerWorld for Software Home page. When prompted, enter the ID and password to access the information and functions for partners.

Applying to the Sales Assistance Program

How to Join PartnerWorld for Software if You are a Prospective Business Partner

If you are not a current Business Partner of IBM and Lotus Programs, follow these steps to apply for membership in the PartnerWorld for Software program:

Note: You must register before accessing the PartnerWorld for Software Profile Editor. Refer to the How to Register for an ID and Password section for information on creating a user ID and password.

1. Start your web browser.
2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter**:

<http://www.ibm.com/software/partners/salesassistance>

This takes you to the Sales Assistance Program web page.

3. From the Sales Assistance Program web page, select the option that applies to your company. Select the new business partner option. Follow the instructions using the links that are provided.
4. Once you have an IBM Registration ID and password and have read and agreed to the PartnerWorld Agreement, select the option to create a PartnerWorld for Software profile.
5. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue. The Profile Management System Home page appears.
6. On the left side of the Profile Management System Home page, you are presented with an option to change your language preference. Click the **Switch Language To** option to expand this section. To change the language of the text (i.e., instructions, helps, prompts, etc.) presented, click on one of the language choices. When another language has been chosen, the word *current* is displayed next to your choice.

Note: The language choices listed are those in which the instructions, helps, and prompts have been translated for the profile editor. If your language preference is not represented, contact the Membership Centre for your geography to request the language of your choice.

7. Displayed on the left side of the screen, you will find a list of navigational links to choose from.
- 8.

Note: The navigational links presented depends on your current status. For example, if you are not a current Business Partner, you will not be presented with the option to update your

profile. The **Profile Management System** navigational link returns you to the Profile Management System Home page. The PartnerWorld for Software Home link returns you to the PartnerWorld for Software Home page. Select the **Go To Detailed Help** link to access help information about the Profile Management System.

9. From the Profile Management System Home page, select the option to create a profile.
10. The next page prompts you to choose to make your edits while online or while offline. Select **Online** to continue a connection to the browser while creating a new profile.

Note: You can also download the profile for disconnected usage. Refer to the **How to Download Your Profile to Work Offline** section for more information.

11. Select the **Application to PartnerWorld for Software and All Initiatives** link to access the full application.
11. If you selected **Online**, the Profile Editor page appears. Continue to enter information for each field. Refer to the Help Pane for a field description. For more information about the Profile Editor, refer to *How to Use the Profile Editor* section.
12. When you have finished entering the profile information, click the **Submit** button to submit your new profile and save the information.
13. A confirmation screen appears. This screen provides you with a confirmation number regarding your application. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
14. PartnerWorld for Software Partner Services will contact you within ten business days once you have completed your profile and have submitted it for processing. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen. (*Note:* Processing time for the request will be approximately four hours.)

Once your profile has been processed, you can select the option to update your new profile. Refer to the *How to Update Your Profile* section for more information.

How to Join if You are a Current Business Partner of IBM and Lotus Programs

If you are a current Business Partner of the IBM or Lotus programs, follow these steps to migrate your membership to PartnerWorld for Software:

Note: Before accessing the PartnerWorld for Software Profile Editor, ensure that you have your own IBM Registration ID and password. Refer to the **How to Register for an ID and Password** section for information on creating a user ID and password.

1. Start your web browser.

2. In the Address or Location bar, enter the following Internet address (also known as URL or Universal Resource Locator) and press **Enter**:

:

<http://www.ibm.com/software/partners/salesassistance>

This takes you to the Sales Assistance Program Home page.

3. From the Sales Assistance Program Home Page select the option to access the information for those who are already a Lotus or IBM Software Business Partner. Follow the instructions and the links that are provided for current partners.
4. Select the link that allows you to access the Profile System for the software Business Partner program(s) of which you are a current member.
5. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.
6. The Profile Management System Home page appears. If you are a current Business Partner but you do not have access to your profile(s), then you will be prompted to enter your location's 16-digit Temporary Access Code for your IBM or Lotus membership profile.
7. Continue to access each profile that is associated with this location. Refer to *How to Access Your Profile* for more information.

Note: This option allows you to access an existing IBM Software Business Partner Program or Lotus Business Partner Program profile in the PartnerWorld for Software Profile System.

8. On the left side of the Profile Management System Home page, you are presented with an option to change your language preference. Click on the **Switch Language To** option to expand this section. To change the language of the text (i.e., instructions, helps, prompts, etc.) that is presented, click on one of the language choices. Once another language has been chosen, the word current is displayed next to your choice.

Note: The language choices listed are those in which the instructions, helps, and prompts have been translated for the profile editor. If your language preference is not represented, then contact the Membership Centre for your geography to request the language of your choice.

9. Displayed on the left side of the screen, you will find a list of navigational links to choose from. Select a link to continue.

Note: The navigational links presented depends on your current status. For example, if you

*are not a current Business Partner, you will not be presented with the option to update your profile. The **Profile Management System** navigational link returns you to the Profile Management System Home page. The PartnerWorld for Software Home link returns you to the PartnerWorld for Software Home page. Select the **Go To Detailed Help** link to access the help information about the Profile Management System.*

10. To access your current profile(s), select the option to enable your profile. Refer to the *How to Access Your Profile* section for more information about enabling your profile.
11. Select the merge profile option to merge an IBM Software Business Partner profile and a Lotus Business Partner profile into a single profile in the PartnerWorld for Software Profile System. Once you have enabled your profile, you can select the option to merge any profiles that belong to this location. You will be prompted to select a primary profile to be used for merging as well as a secondary profile. Refer to *How to Merge Your Existing Profiles* for more information.
12. After you have enabled your profile and merged any existing profiles, from the Profile Editor check the box to Apply to PartnerWorld for Software. This function allows you to migrate an IBM or Lotus Business Partner profile to a PartnerWorld for Software profile. Refer to *How to Migrate Your Profile to a PartnerWorld for Software Profile* for more information about migration.
13. To create a new location, select the option to create a profile from the navigator. Refer to the *How to Add New Location* section for more information.
14. To open up an existing profile, select the option to update your profile. Refer to *How to Update Your Profile* for more information.
15. To return to PartnerWorld for Software Home page, click on **PartnerWorld for Software Home**.

How to Access Your Profile

If you are already a Lotus or IBM Software Business Partner, you will receive a 16-digit temporary enablement code that corresponds to your profile. This number allows you to access all of your existing profiles. The Enable Profile option allows you to enable an existing IBM Software Business Partner Program or Lotus Business Partner Program profile in the PartnerWorld for Software Profile System.

Once you have accessed your profiles, the system will associate you as the administrator of the profile(s). If you did not receive a temporary enablement code, then contact the Membership Centre.

To access your profile(s), do the following:

1. Select the link that allows you to access the PartnerWorld for Software Profile System. You will be prompted for your IBM Registration ID and password. Enter your IBM Registration ID and password and then click **OK** to continue. The Profile Management System Home page appears.

2. If you are a current Business Partner but you do not have access to your profile(s), then you will be prompted to enter your location's 16-digit Temporary Access Code for your IBM or Lotus membership Profile. Enter your temporary access code and click **Continue**.
3. The next page provides a list of the existing profile(s) for this location. The phrase **Just Enabled** displays indicating that this profile has been enabled. Select one of the profiles to access the Profile Editor. Refer to *How to Update Your Profile* for more information.
4. Continue enabling each profile that is associated with this location by selecting the option to enable profiles.

How to Merge Your Existing Profiles

If you are a member of more than one program (for example, Lotus Business Partner Program or IBM Partner Program - Software, Tivoli Partner Program), by selecting the **Merge Profiles** link you have the option to merge profiles. This option allows you to consolidate your updated profile information without changing membership. The Merge Profiles option lets you merge an IBM Software Business Partner Profile and a Lotus Business Partner profile into a single profile in the PartnerWorld for Software Profile System. The combined profile has all the information (company name, contact information) from your existing memberships. Keep in mind, that no data will be lost if one of your existing profiles has information and the other one does not.

***Note:** Merging is optional and is not the same as joining the PartnerWorld for Software program but is for those who do not wish to change membership from the existing programs to become a PartnerWorld for Software Business Partner. For example, the Business Partner may be a member of the Lotus Partner Program as it exists when the PartnerWorld for Software profile editor is available. This Business Partner can continue to manage that relationship using the new profile editor without changing the program relationship.*

To merge your existing profiles, complete the following steps:

1. From the Profile Management System Home page, select the option to merge profiles.
2. The next page provides a list of the existing profiles that can be merged. Select the priorities of the companies to be merged. If there are no profiles found to be merged, a message will display to indicate this.

***Note:** Only one profile from each group can be merged (for example, two IBM profiles cannot be merged with a Lotus profile. You can merge one Lotus profile with one IBM profile and one Tivoli profile). Keep in mind that the priority you select is very important. Secondary profiles will have secondary values. The values from the second profile will only be added to the first profile if the first profile does not have a value entered for that field.*

3. Once the priority of the companies that are being merged is selected, click **Continue With Merge**. The next page advises you that your request is being processed.

4. To view the information that was merged, select the option to view pending changes from the navigator on the left side of the screen.

How to Migrate Your Profile to a PartnerWorld for Software Profile

The migrate function of the Profile Editor allows you to migrate an IBM Business Partner or Lotus Business Partner profile to a PartnerWorld for Software profile.

Note: This section is not applicable to those partners who do not yet wish to change membership (migrate) from their current program membership to PartnerWorld for Software. For those partners who do not wish to change membership from the existing programs to become a PartnerWorld for Software Business Partner, the migration function of the Profile Editor is optional. A Business Partner that is a member of a program as it exists when the PartnerWorld for Software profile editor is available can continue to manage that relationship using the new profile editor without changing the program relationship.

To migrate your existing profile to a PartnerWorld for Software profile, follow these steps:

1. To access the Profile Editor, select the option to create or update a profile. Refer to *How to Use the Profile* for more information about the Profile Editor.
2. From the **Menu** navigation bar, select your Business Partner relationship. The following is an example of the section on the Profile Editor that allows you to apply for PartnerWorld for Software membership:
3. Select the check box to apply to PartnerWorld for Software. A confirmation dialog box appears.
4. To read the terms and conditions of the agreement, select the link to read the PartnerWorld agreement.
5. If you accept the terms and conditions of the agreement and wish to join PartnerWorld for Software, then click the **Yes** button to close the confirmation dialog. Once you have accepted the agreement, the **PartnerWorld for Software Information** link is added to the Menu navigation bar.
6. From the Menu navigation bar, select the **Initiative** link to further define the relationship.
7. If you wish to accept an initiative relationship (i.e., Lotus, Lotus Authorized Education Centers, Service Providers for e-business, IBM Firm Certification for e-business, or **Sales Assistance Program**), select the check box to apply to that initiative. *Note: You must apply to PartnerWorld for Software before joining these Initiatives.*
8. Once you have accepted an initiative, select that link from the Menu navigation bar to enter information.

9. Select **Apply to the Sales Assistance Program** to join the Sales Assistance Program Initiative. Refer to the *How to Apply to the Sales Assistance Program* section for more information.
8. Before submitting the profile, enter information for all of the required fields. Refer to *How to Update Different Types of Data Formats* for more information.
9. Once you have entered information in all of the required fields, click the **Submit** button. Your request is then reviewed by the Membership Centre.
10. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen. (*Note: You will not see a listing about this request until it has had time to reach the system for processing. Processing time for the request will be approximately four hours.*)

How to Apply to the Sales Assistance Program

Program Overview

The IBM and Lotus Sales Assistance Program allows qualified Business Partner firms to be compensated for pre-installation marketing and sales efforts resulting in IBM and Lotus software (Program) sales.

Program Benefits

The IBM and Lotus Sales Assistance Program can improve the profitability of approved Business Partners who perform pre-sales marketing and sales activities which result in IBM or Lotus software Program sales. This program also provides a vehicle for program participants to be eligible to receive reimbursement for expenses associated with their investments in IBM or Lotus software Program sales and marketing activities.

Program Requirements

Participants must be an active member of the IBM PartnerWorld for Software. IBM and Lotus Sales Assistance Program participants are customer-facing IBM Business Partners that earn compensation for convincing the end-user customer to acquire selected IBM or Lotus software Programs. Participants are expected to do some or all of the following:

- Perform end-user needs analysis and Program demonstrations
- Provide consulting studies and proposals
- Develop implementation plans
- Lead customer pilot or prototype efforts

Participants in this program are highly skilled sales and technical professionals who are able to persuade customers to commit to IBM or Lotus software Programs.

Forms of Compensation

The IBM and Lotus Sales Assistance Program has two forms of compensation:

1. Fees (hard dollar rewards)
2. Expense reimbursement / Business Development Funds (soft dollar rewards)

Hereafter, these two forms of compensation are collectively called “Compensation.”

Applying to the Sales Assistance Program

Follow these steps to apply to the Sales Assistance Program:

1. From the **Menu** navigation bar, select your Business Partner relationship.
2. Select the check box to apply to PartnerWorld for Software. A confirmation dialog box appears.
3. To read the terms and conditions of the agreement, select the link to read the PartnerWorld agreement. If you accept the terms and conditions of the agreement and wish to join PartnerWorld for Software, then click the **Yes** button to close the confirmation dialog. Once you have accepted the agreement, the **PartnerWorld for Software Information** link is added to the Menu navigation bar.
4. From the Menu navigation bar, select the **Initiative** link.
5. Select the check box to apply to the Sales Assistance Program initiative.

***Note:** You must apply to PartnerWorld for Software before joining this Initiatives.*

8. Once you have accepted the Sales Assistance Program initiative, select that link from the Menu navigation bar to enter information.
9. Before submitting the profile, enter information for all of the required fields. Refer to *How to Update Different Types of Data Formats* for more information.
10. Once you have all required information in SAP Information found on the Menu navigational bar, click the **Submit** button. Your request is then reviewed by the Program Manager.
11. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen. (***Note:** You will not see a listing about this request until it has had time to reach the system for processing.*) Processing time for the request will be approximately four hours.

Adding References

A requirement of the Sales Assistance Program is that for every S/390 or AS/400 category that approval is requested the following references need to be supplied..

Two online references

One e-mail or written reference on customer letterhead to Neil Lowenbraun.

To add references, follow these steps:

1. Select **Customer Reference** under **Level Criteria** on the Menu Navigational Bar.
2. Enter two customer references for each category approval is requested.
3. To add a customer reference click on the **Add Reference Box** and complete the Reference Information sections. Select **Sales/Influence** for **Activity Type**.
4. A category can be selected from a drop down box under the **Reference Administration Information** section. Every reference requires a category selection.
5. Click on the **Submit** button to have the customer reference change request submitted.
6. See *Pending Changes Section* for information on viewing the status of your change.

Adding Additional Categories

Once you have an approved Sales Assistance Program contract, additional categories can be added if the category criteria is met. If you have an opportunity for this category and do not have approval yet, the opportunity can be entered and will be put in a pending status until approval is received.

If you are applying for a workstation category then the appropriate certification is required.

If you are applying for a S/390 or AS/400 category then the appropriate education and customer references are required.

Once your Sales Assistance Program application is approved, follow these steps to add additional categories:

1. Select **SAP Information** from the Menu navigational bar.

2. Page down to **Eligible Product Categories**.
3. Select Product Category from the drop down box.
4. Click **Submit** at bottom of screen to have the category addition submitted..
5. See *View Pending Changes Section* for information on viewing the status of your change

How to Add or Change Customer Information

Add a Customer

1. Select Customer Information that is directly under SAP Information on the Menu navigational bar.
2. Click the **Add Customer** Button.
3. The fields will clear and customer addition can begin. Enter all required information including contact and e-mail address.
4. Enter all fields until you see **Customer Opportunity**. When you reach the **Customer Opportunity** section you have completed the customer addition.
5. To process the customer addition click the **Submit** button at the bottom of the screen.
6. If any information has been missed an error report will display versus a confirmation number. To correct the information simply click on the field that displays the error. The system will take you to the field and let you correct the problem.

Change Customer Information

1. Select Customer Information that is directly under SAP Information on the Menu navigational bar.
2. Select your customer from the customer listing at the top of the screen.
3. The customer information will display and can be modified at this time. Only update the information that is prior to the **Customer Opportunity** section.
4. To process the changes click the **Submit** button at the bottom of the screen.

How to Submit an Opportunity

An active opportunity consists of two parts: 1) a customer profile, and 2) forecasted categories chosen from the IBM and Lotus Sales Assistance Program Exhibit. The customer profile defines the targeted prospect. The forecasted categories detail the software being proposed to the customer. An inactive opportunity consists of a customer profile only. In order to activate an opportunity, the opportunity must include at least one forecasted category.

The end result of the application process is the creation of an electronic profile which is unique for each partner. The profile contains partner identification information (firm name, firm address, contact individual, phone number, etc.), the Product Categories approved for fees and a template for opportunity registration.

Prior to the development of the current Web Tool, opportunity registration was accomplished using an electronic Project Form. This Project Form was submitted from the Sales Assistance Program Web site. The e-business Web Tool permits a partner to easily register prospects, keep track of the status of the opportunities they have entered and update those records as situations change. The electronic profile also provides a convenient vehicle to monitor forecast information for software sales.

Program participants must register their sales opportunities with IBM according to the following time frames. Opportunity registration is done using the e-business Web Tool..

- For S/390 software, the opportunity must be registered prior to the Order date;
- For AS/400 software, the opportunity must be registered at least 30 days prior to the First Date of Charge (FDOC);
- For IBM workstation and Lotus software, the opportunity must be registered at least 15 days prior to the date on the document submitted as proof-of-purchase.

Submitting an Opportunity

1. To enter an opportunity in the new tool. Select **Customer Information** from the Menu navigational bar.

2. Select the customer that the opportunity is with, if the customer does not exist ; add it at this time. Do not click on the **Submit** until the following information has been entered.
3. Complete the **Customer Opportunity** section .Click the **Add New Opportunity** and ensure that a category is selected.
4. Enter **Contact Information**, if the contact is different from the contact designated for the customer.
5. Enter the **Opportunity Forecast** section and click on the **Submit** button at the bottom of the screen.

An opportunity will remain valid for one year. If the opportunity forecast changes the expiration date changes. At the time an opportunity is entered a multiple partner check is done by the system. If another business partner is working on the same opportunity as you, both parties will be notified via e-mail. Once the opportunity is entered an end user letter will be sent to the customer if hard dollars are selected. This letter will be sent via e-mail.

Requesting Payment for an Opportunity

Once the end user has decided to acquire the IBM or Lotus software Program proposed by the program participant, a Sales Assistance Confirmation Form must be completed within four months of the FDOC (for S/390 and AS/400 software Programs), or within four months of the date on the document submitted as proof-of-purchase for IBM workstation or Lotus software Programs.. To complete a Sales Confirmation Form select Payment Information section of the online system.

1. Select **Opportunity Information** on the Menu navigational bar and complete the **Opportunity Actual** section for the opportunity.
2. Select **Payment Information** which is under SAP information on the Menu navigational bar.
3. Check the optional box to update.
4. Enter all information about the opportunity you are requesting payment.
5. If you would like a cover letter for the Sales Confirmation Form enter the text in the **Cover Letter** field.
6. If you want the Sales Confirmation Letter to go directly to your customer select Direct E-Mail.
7. If you do not select Direct E-Mail the Sales Confirmation Letter will be sent to you via e-mail.
8. You have two choices at this time, you can forward this to your customer or you can print this letter and take it to your customer for manual signature. The manual signature is not recommended, due to the fact that the system has no way to track a manual signature.
9. The BPSO will perform all back-end payment processing.

10. If the payment request is rejected the status will be changed to rejected and an e-mail will be sent to the Business Partner requesting the payment.
11. Once a payment request is closed by the BPSO, meaning payment has been issued. The opportunity is marked closed and kept for one year for history purposes.

Legacy Project Information

Before the Sales Assistance Program converted the processing from a manual to automated process, Harte Hanks managed the project forms. This data has been migrated to the new system. To view this data and understand how to convert these opportunities follow the directions below.

1. Select **Legacy Project Information** from the Menu navigation bar.
2. The project data is ordered by legacy project number.
3. Select a project number from the drop down box at the top of the screen.
4. The following information is available.

Customer Name, Customer Address, Contact Name and Number, Expiration Date, Category or Categories

This information will be available until the project expires, or until the opportunity is entered within the **Customer Opportunity** section. To enter the opportunity follow the normal process and enter the Legacy Project Number in addition to the normal information. Once this number is entered the Legacy Project Data for that opportunity will be deleted.

How to Add a New Location

1. From the Profile Management System Home page, select the option to create a profile.
2. The next page prompts you to choose to make your edits while online or while offline. Select **Online** to continue a connection to the browser while creating a new profile.

*Note: You can also download the profile for disconnected usage. Refer to the **How to Download Your Profile to Work Offline** for more information.*

3. Select one of the following links:
 - w The **Basic Application** link allows you join PartnerWorld for Software, and enter information about your location (for example, company location address) and the administrator of the profile.
 - w Select the **Application to PartnerWorld for Software and All Initiatives** link to access the full application.
4. If you selected **Online**, the Profile Editor page appears. Continue to enter information for each field. Refer to the Help Pane for a field description. For more information about the Profile Editor, refer to the *How to Use the Profile Editor* section.
5. When you have finished entering the profile information, click the **Submit** button to submit your new profile and save the information.
6. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
7. To check the status of your new profile, select the option to view pending changes from the navigator on the left side of the screen. (*Note: Processing time for the request will be approximately four hours.*)

How to Update Your Profile

1. From the Profile Management System Home page, select the option to update profiles.
2. The next page prompts you to select how you would like to make your edits. Select **Online** to continue a connection to the browser while editing your profile.

Note: You can also download the profile for disconnected usage. Refer to the [How to Download Your Profile to Work Offline](#) for more information.

3. Select your profile.

Note: Only those profiles that you have accessed will be listed. If you have not accessed your existing profile(s) for your current program membership (Lotus Business Partner Program, IBM Partner Program - Software, Tivoli Partner Program), then there will not be a selection listed.

4. If you selected **Online**, the Profile Editor page appears. Continue to edit your profile. Refer to the Help Pane for a field description. For more information about the Profile Editor, refer to the *How to Use the Profile Editor* section.
5. When you have finished editing the profile information, click the **Submit** button to submit your changes and save the information.
6. A confirmation screen appears. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
7. From the navigator on the left side of the screen, select the option to view pending changes to check the status of your request. (*Note: Processing time will be approximately one hour.*)

How to Download Your Profile to Work Offline

Using the PartnerWorld for Software Profile Editor, you can update your profile online or offline. If you choose to download the application to your local machine, you can make changes to the profile while being disconnected from the Internet. When you are ready to submit your changes, simply reconnect to the Internet and submit your changes.

Follow these steps to download your profile to work offline:

1. From the Profile Management System Home page, select the option to create a profile or update your profile.
2. The next page prompts you to choose to edit while online or offline. Select **Offline** to download your the profile to the workstation for disconnected usage.

Note: Once you have finished entering the profile information, you can upload the new profile.

3. You must save this page to your local machine in order to successfully update your profile. To do this, follow these steps:
 - a. From the File menu, select the **Save As** option.
 - b. The Save Web Page dialog box appears. Browse to the location that you wish to save the file. (*Note: Select a location that is easy to remember.*)
 - c. In the **File name** box, enter a file name or you can accept the default name that is provided.
 - d. Select **Web page, HTML only (*.htm, *.html)** as the Save as type.
 - e. Leave the default for the **Encoding** selection.
 - f. Select **Save** to close the Save Web Page dialog box.
 - g. Once you have saved the web page, use the **Browse** button to find the file. A dialog box displays that allows you to browse to the file that you just saved.
 - h. Find the file and then click the **Open** button. The file name now appears in the box.
4. Click the **Continue** button to access an offline copy of the Profile Editor. The Profile Editor screen appears.
5. Continue to enter information for each field. Refer to the Help Pane for a field description. For more information about the Profile Editor, refer to the *How to Use Profile Editor* section.
6. To save the profile, click the button to save the profile. A dialog box displays to advise you that you have fourteen days to submit your Profile. (*Note: If your profile remains unchanged beyond this period, the changes will be lost. You may submit your changes, continue to edit or close the browser.*)
7. Click **OK** to close the dialog box.
8. To submit your profile, click the **Submit** button from the Profile Editor.
9. The Login dialog appears. You will be prompted for your IBM Registration ID and password. Enter your ID and password and then click **OK** to continue.
10. A confirmation screen appears. This screen provides you with a confirmation number regarding your application. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.

11. To check the status of your application, select the option to view pending changes from the navigator on the left side of the screen. (*Note: You will not see a listing about this request until it has had time to reach the system for processing. This time could be a few hours.*)

How to Use the Profile Editor

The new easy-to-use online profiling capability will enable those Business Partners with multiple locations to enjoy simpler, more straightforward management of their administrative relationships with IBM. At each company location, you may have a local administrator that maintains your local membership profile or you may opt to have one global administrator to maintain all local profiles. Regardless of your choice, each location must designate a Lead Administrator to receive leads and a Business Contact who will access software download information and receive Demo and Evaluation software.

Establishing a Member Profile is required as part of the Membership Application process to join Partner-World for Software. The Member Profile must be updated, however, we urge you to keep your profile information up-to-date.

Follow these steps to use the Profile Editor:

1. To access the Profile Editor, select the option to create or update a profile.
2. From the Menu navigation bar, select the **Expand Menu** or **Collapse Menu** option to expand and collapse the information.

You can navigate by doing one of the following:

- w From the Menu navigation bar, select a specific section that you wish to display by clicking on one of the sections from the list. The Profile Editor displays the first field of that section.
 - w Click the << **Prev. Section** or **Next Section** >> button to access each section of the Profile Editor.
 - w Tab to the field or use the scroll bar to bring the desired section into view.
3. The Show Print Version link accesses the Print Version view, which displays all the fields within the Profile Editor that contain data. To access this option, select the **Show Print Version** link from the Menu navigation bar. The Print Version view appears.
 4. From this view, you can print a copy of the profile. The Show Print Version view also allows you to edit the fields by clicking on the link to access that field within the Profile Editor.
 - { Type **Ctrl+P** or choose **Print** from the File menu to print the profile information.
 - { To close this window, click the **X** button located on the left side of the screen or select **File > Close** from the menu selection.

4. The Modify Preferences option allows you to choose a date format. To access this option, select the **Modify Preferences** link from the Menu navigation bar. The Pick a Date Format dialog box appears.
5. To close this dialog box, click **Close This Window** button.
6. Continue to enter information for each field. The Help Pane provides a description for each field. Refer to the *How to Update Different Types of Data Formats* section for more information about the field selection.
7. Once you have finished entering the profile information, click the **Submit** button to submit your profile and save the information.
8. If you did not enter required information in a field that was indicated as a *Required Field* or if a field failed validation, the Validation Report screen displays prompting you to enter the required information or correct the information. Refer to the *How to Update Different Types of Data Formats* section for more information. From the Validation Report screen, click on the link to access that field within the Profile Editor.
9. Once the correct information has been entered for all of the fields that have failed validation and information has been entered for all required fields, select the **Submit** button again to submit the profile and save the information. A confirmation screen appears.
10. This screen provides you with a confirmation number regarding your request. Write down this number for any future inquiries. To close the confirmation screen, click the **Close This Window** button.
11. To exit the Profile Editor without saving the information, click the **Exit** button.

How to Update Different Types of Data Formats

The Profile Editor uses the following data formats for editing the information:

- w Fill in the blank** - Place the cursor in the box to fill in the information.
- w Selection list** - Click the down arrow and then select the appropriate value.
- w Multiple selections** - Complete the following steps:
 1. Highlight the appropriate values from the list presented.
 2. To add additional selections from the multiple selection list, hold down the **CTRL** key while clicking on an item or to remove a selection, click on that item while holding down the **CTRL** key. A group of items that are next to each other can be selected by holding down the **Shift** key while selecting the first item in the group and then selecting the last one in the group.

w Multiple lists in a hierarchical tree selection list - This type of selection list allows you to add multiple lists.

Complete the following steps:

1. Select the **Click here to add new items to the list** button to display the selection list.
2. Select from the list to display the next selection list.
3. You are then prompted to choose the items in this section. Select the next level from the selection list. Each time that you make a selection, this item is listed in the **Your current selections are** box.

***Note:** For sections that allow you to add multiple selections, hold down the **CTRL** key while clicking on an item or to remove a selection, click on that item while holding down the **CTRL** key. Each item that you select is then added to your current selection list.*

4. Continue adding items to the list. To keep track of where you are at in the selection list, refer to the **Now In . . .** Information. To return back to a previous list, select the **Back to . . .** selection located at the top of the screen.
5. Once you have finished adding items to the list, click the **Click here when done adding item(s) to the list** button to close the hierarchical tree selection list. Your selections are now listed in the **Your current selections are** box. The following is an example of the current selection list:
6. To delete an item from the selection list, select that item and then click the **Click here to remove the selected item(s) from the list** button. To select more than one item, hold down the **CTRL** key and then click each item you want to select or click on that item while holding down the **CTRL** key to remove a selection. To select a group of items that are next to each other, hold down the **Shift** key while selecting the first item and then select the last one in the group.

w Optional selections - Do the following:

1. When the optional box is checked, this indicates that you wish to enter information for this section of the profile. If the optional box is not selected and you attempt to enter data into any of the fields for that section, an error message will display prompting you that the optional box must be selected.
2. Click **OK** to continue, then check the box and continue to enter the information.

w Add a new entry section - Complete the following steps:

1. To access an existing entry, click the **down** arrow and select from the list. You can also click on the **left/right** arrow (<< and >>) to scroll through the list. Once you have reached the end of the list, a dialog box appears letting you know that there are no more entries in that direction. Click **OK** to continue. The information about the selected entry, will appear in the fields below the selection. The following is an example of a multiple entry section:

 2. Click the button that allows you to add new information. If you attempt to insert data into one of the fields for that section before selecting this button, an error message will display prompting you to click on the button that allows you to add a new entry. Click **OK** to continue and then select the new entry button to enter the values again.

 3. To delete an entry, check the delete entry box.
- w Required fields or failed validation** - If you did not enter required information in a field that was indicated as a *Required Field* or if a field failed validation, the Validation Report screen displays prompting you to enter the required information or correct the Information.
- w Complete the following steps:**
1. From the Validation Report screen, click on the link to access that field within the Profile Editor.
 2. Once the correct information has been entered for the fields that have failed validation and information has been entered for all required fields, select the **Submit** button again to submit the profile and save the information.

Viewing Pending Changes

How to View the Pending Changes

From the Profile Management System page, select the option to view pending changes. The next page provides a list of the change request(s) that have been submitted in the last thirty days. The Status column will indicate the status of your request.

To review the changes made, follow these steps:

1. Select a change request to access the Profile Editor to review the changes made.
2. Select the **Exit** button to close the Profile Editor.