Where to go for help

- Contact PartnerLine (PartnerWorld Contact Services) at 1-800-426-9990. Press zero and the pound sign (#) to reach a live person immediately.
- Send the BCC Help Desk an e-mail with your question at bcc@us.ibm.com.
- BCC Information Home Page: https://sawa04p.austin.ibm.com/partnerworld/mem/order/otp_bcc.html

Notes:

- Help Desk support will be available Monday through Friday, 8:30AM to 5:15PM Eastern Standard Time (EST).
- In the event that you do not reach a Help Desk team member immediately, the Help Desk will respond to your question within 24 hours.

Accessing BCC

1. First, request access to BCC from your Business Partner Administrator (Business Partner firm focal point). Include your IBM ID in the request. The Business Partner Administrator will then give you access to the application.
2. To access BCC in the US, click this link: http://www.ibm.com/partnerworld/bidcertificationcenter/na/en_us
   To access BCC in Canada (French), click this link: http://www.ibm.com/partnerworld/bidcertificationcenter/na/fr_ca
   To access BCC in Canada (English), click this link: http://www.ibm.com/partnerworld/bidcertificationcenter/na/en_ca
   (**Note**: You will need to enter your IBM ID and password)

To log off BCC, press **Ctrl+Shift+x**.

Notes:

- New Business Partners must register for BCC. Your firm must first be in the PartnerWorld Profiling System PPS before it can be enabled for BCC. Contact PartnerLine to start this process.
- If you log on to BCC and see a blank screen, it means you are not set up properly in BCC. Close the window and contact your Business Partner Administrator.

Setting your time zone

When you access BCC for the first time, the first thing you must do is set your time zone. To set your time zone:

1. Click **Profile** in the upper right of the screen.
2. Click the list arrow in the **Time Zone** field.
3. Click your time zone.
4. Click **Save**.

Arranging your workspace

You should arrange your workspace so that you see the most relevant columns first. To arrange columns in the **Opportunities** view:

1. Click the **Opportunities** screen tab.
2. Click the **Menu** list arrow.
3. Click **Columns Displayed**.
4. Use the Up and Down arrows to move columns from the Available Columns list to the Selected Columns list. Click **Save**. The columns will now display in the order you indicated.

Note: To restore the original column order, click **Reset Defaults** in the **Columns Displayed** window.

Managing certification reviews

There are some steps you can take to help prioritize your work on Certification Review Requests.

1. Click the **Activities** Tab.
2. Click the **Queries** list arrow.
3. Click **All Certif Requests**.

Note: New requests will always have an asterisk in the New column.

Adding accounts

1. Click **Site Map**.
2. Under **Accounts**, click **Accounts List**. **Note**: This list displays accounts one at a time. To move to the next account, click the arrow next to the numbers on the upper right of the record.
3. In the Accounts list, click **New** to create a new record.
4. In the **Name** field, type the account name.
5. In the **Address** field, click the field control icon. Choose the address or click **New** to create a new address.
6. Create the address, click **Save**, and click **OK**.
7. Complete the remaining Account fields.
8. Click the **Save** button.
9. Click the **Contacts** view tab to create new contacts or associate contacts to the account. To associate a contact, click **New,** then click the box to the left of the name to select it, and click **OK**. To create a new contact, click **New**, fill in the required data, and any additional information you may have. **Note:** These are end user contacts, related to the account. These are not opportunity sales team members.
10. When finished, click the Menu list arrow, and click **Save Record.**

Finding accounts

To quickly locate an account from the account list:

1. Click **Query**.
2. You can query on any of the fields by typing your query in the field. You can use an asterisk (*) for a wild card. **Note**: Queries are case sensitive.
3. Click **Go**.

Note: You can also use Query Assistant to run a query. Click **Query Assistant** instead of Query.

Creating an opportunity without a request

A new opportunity can be created as a new record or can be created as a copy of an existing opportunity, using the Siebel standard copy functionality.

To create an opportunity as a new record:

1. Click the **Opportunities** screen tab.
2. Make sure that the value in the **Show** field is **My Opportunities**.
3. Scroll down and click **New** to create a new opportunity in the lower applet.
4. Complete all the required opportunity fields (identified with a red asterisk (*).
5. Complete all the optional fields where you have the information.
6. Click **Save**.

Note: The Certification Stage field value for this opportunity will be **Open** and it can't be changed until a request is linked to it.

To create an opportunity by copying an existing opportunity:

1. Click the **Opportunities** screen tab.
2. Navigate to the opportunity and select it.
3. Click the **Menu** field list arrow.
4. Click **Copy Record**.
5. Edit the **Description** field and any other appropriate fields so you can distinguish this opportunity from the original.
6. When you are finished, click the **Menu** list arrow in the lower applet and click **Save Record**.
7. When you create an opportunity in BCC, you are automatically the owner (primary) of that opportunity. However, you do have the ability to add opportunity team members.

Adding opportunity team members

When you create an opportunity in BCC, you are automatically the owner (primary) of that opportunity. However, you do have the ability to add opportunity team members.

- Opportunity team members can make changes to the opportunity. For example, they can add new members to the team, modify data, and attach documents. They can also submit an opportunity in response to a request.

- Opportunity team members can be employees from your firm. You can also add team members from the linked request activity; including IBM Certification Representatives, Distributor Representatives, and IBM Channel Representatives.

To add opportunity team members:

1. Click the field control icon in the **Sales team** field of the opportunity record.
2. If the people you want to add are in the list, select them by clicking the check box.
   Note: The people enabled to have access to BCC by the Business Partner Administrator (firm focal) will all appear in this list. Therefore, you will see all the people in the Business Partner firm and you can choose the ones you want to add to the record.
3. If you want to quickly locate a specific individual, run a query. Click the list arrow in the **Find** field and select the field you want to query on.
4. Type your query in the **Starting with** field and click **Go**.
5. When finished, click **OK**.

Adding attachments

Any opportunity team member can add an attachment to the opportunity.

1. To add an attachment, drill down on the opportunity number to the opportunity record, and click the **Attachments** view tab.
2. Click **New**.
3. Click the **Attachment Name** field control icon and locate the document.
4. In the **Comments** field, identify the attachment for the Special Bid Certification Team Representative.
5. If you want the attachment to be released to IBM in the event of a bid certification review, check the **Release** box. Otherwise the document will only be available for the opportunity team members. Any member of the opportunity team will be able to download and modify the attachments.
   📖**Note**: If you have a large number of files, first, zip the files that you want IBM to see together and add it as one attachment, and click the **Release** checkbox. Then, zip the files that you don't want to release to IBM to another zip file.
6. Click the **Save** button.

Adding comments

You should use the comments section to key in your development timeline narrative for this opportunity, and then attach supporting evidence for your timeline.
To add notes or comments to an opportunity:

1. Click the **Opportunity Notes** view tab.
2. Click **New**.
3. Click the list arrow in the **Type** field and choose the type.
4. Type the note in the **Description** field.
5. As with attachments, if you want the note to be released to IBM in the event of a bid certification review, check the Release box. Otherwise the note will only be available for the opportunity team members. Once the Opportunity has been submitted the note records become read only.
6. Click the **Save** button.

Providing contact data

You can also add end user contacts to the opportunity:

1. Click the **Contacts** view tab.
2. Click **New**. The Add contacts window appears.
3. Select your contact or click **New** to add a new contact that is not in the list.
4. Click the **Menu** list arrow and click **Save Record**.

📖**Note:** Contacts are different than the opportunity team members that you add in the **Sales Team** field. Contacts cannot make changes to the opportunity. These are end-user contacts, specific to the end-user account.

Receiving notification of a review

You will receive notification of a review in two ways:

1. You will receive an e-mail from the IBM Certification Rep that a review is requested.
2. You will also receive notification of a review as an Activity in BCC. This activity will appear on your Activities screen tab, My Activities view. You will also see this activity as an Alert on your BCC home page.

📖 **Note:** Do *not* reply to any e-mails you receive from BCC. They are system generated.

Linking the opportunity record to the request

1. If you have already created an opportunity when the request activity arrives, you need to link the opportunity to the request.
2. Click the **Opportunities** screen tab.
3. Drill down on the **Opportunity Number** field.
4. Click the **Bid Certification Detail** view tab. **Note:** The **More Info** view tab is a placeholder for future functionality. You do not need to work with it now.
5. Under Request Activity on the right of the screen, click the field control icon in the **Description** field.
6. Click the appropriate activity (the associated Certification Review Request) to select it. Click **OK**.
7. The information is populated in the opportunity.
   📖**Note:** All the information related to the bid should be completed before the opportunity can be submitted. Mandatory fields with a red asterisk *must* be completed. In addition, the following fields must be completed *before* you submit the opportunity: **Product**, **Project Name/RFP**, **Install at Location**, **VAE Justification**, **Special Bid Number**, **Quarter to Ship**, and **Competition**.

Working with others outside your firm on a request

- Once you receive a request and link an opportunity to it, you can view the employees tied to that activity and add them to the opportunity team (**Sales Team** field in the Opportunity record). You may want to do this so these people can download, update, and upload attachments.
- The activity will come with a distribution list of IBM employees and Distributor Representatives.

📖**Note:** The **Collaborate** button is a placeholder for future functionality and is not used for bid certification.
To view the list of employees that you can potentially add to the **Sales Team** field:

1. Click the **Opportunities** screen tab.
2. Drill down on the **Opportunity Number** field.
3. Click the **Employees** field control icon in the Request Activity section of the opportunity record.
4. Select the employee you want to add to the opportunity team.
5. Click the **Add to Sales Team** button.
6. Click **OK**.

Creating an opportunity to respond to a request

You may receive a request for a certification review for an opportunity that you have not created in BCC yet. In that case, perform the following steps:

1. After you receive the Certification Review Request e-mail, log on to BCC.
2. You will see a Certification Review Request alert on the BCC home page.
3. Click the hyperlink in the **Type** field.
4. Click **New** in the lower applet to create the opportunity.
5. Complete the fields in the opportunity record.
6. Click the field control icon in the Account field to select the customer account.
7. Highlight the correct account and click **OK**. Notice you can query for the account using the **Find** and **Starting with** fields.
8. Complete the opportunity information and click **Save**.

9. Click the hyperlink in the **Opportunity Number** field to add the required information to respond to the Certification Review Request.
10. Under the **Bid Certification Detail** tab, enter the required information.
11. Click the **Attachments** and **Opportunity Notes** tabs as shown earlier in the presentation to attach the necessary documentation.
12. When you are ready to submit the opportunity to IBM, click the list arrow in the **Certification Stage** field.
13. Click **Submitted** to submit the request to the Special Bid Certification team.

Submitting the certification package

To submit an opportunity, change the **Certification Stage** field in the opportunity to **Submitted**.

Notes:

- If you want to withdraw from the certification review, click **Withdrawn** instead of **Submitted**.
- The opportunity will now be able to be reviewed by any team member on the request activity.
- All the required fields in the opportunity should be completed before the submission. The opportunity or any of its related records (attachments, notes, and so on) will *not* be able to be modified once it is released.
- Any member of the opportunity team can release the opportunity. 🕮**Note**: Opportunity team members are identified in the **Sales Team** field of the opportunity.

Receiving notification of a decision

- E-mail notification will automatically be sent to each team member by the IBM Certification Rep when the certification review is complete. This e-mail will direct you to BCC to review the outcome.
- Possible outcomes are:
  - Passed: Your bid will be released to pricing for consideration.
  - Failed: Your bid has not passed the certification review and your special bid will be withdrawn.
  - Withdrawn: You would like to withdraw from consideration for the Special Bid.
- If you fail the certification review, a reason will be included in the e-mail.