Where to go for help

- Global Partner Portal Online Help. Click **Help** in the application menu in the upper right corner to access Online Help .
- Global Partner Portal support and education page
- PartnerWorld Contact Services

Creating an opportunity

Global Partner Portal is one of the opportunity management (OM) systems that IBM uses to track opportunities. Any sales opportunity for IBM products that an IBM Business Partner is pursuing should be entered into Global Partner Portal so it is included in the pipeline. Business Partners can create a new opportunity using a minimum of required data fields. For each opportunity, Business Partners can determine the level of information and opportunity data that is shared with IBM.

To create a new opportunity record:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
   Note: The opportunities that display in the **My Opportunities** view are:
   - Opportunities that you created
   - Opportunities that include you in the sales team
2. Click **New**.
   The Opportunity applet is displayed.
3. Click the **Account** control icon.
4. Query for your account. For instructions, see the topic *Finding an Account* in this document.
5. To select the account, click the chevron beside the account.
6. Enter a description of the opportunity in the **Description** field.
7. Select a **Sales Stage** field value for the opportunity.
8. Complete the required fields that are marked with a red asterisk (*).
   Notes:
   - See the topic *Attaching supporting documents* in this document for information about adding attachments.
   - See the topic *Adding notes* in this document for information about adding notes to the opportunity.
   - See the topic *Sharing your opportunity data with IBM* in this document to determine how to set the **Work in GPP** and **Is Restricted** fields.
   - See the topic *Adding contacts to an opportunity* in this document for information about how to complete the **Customer Contact** field.
   - See the topic *Adding sales team members* in this document for information about how to add team members to an opportunity.
   - See SSM education material for definitions of Sales Stages.
9. **For U.S.A. opportunities only**, if applicable, IBM will contact the Business Partner regarding ITAR compliance.
10. Click **Save**.
    An opportunity is created and saved.
    Notes:
    - **DO NOT** use the **Menu** icon to create opportunity records using **New Record** or **Copy Record**. To create new opportunity records, you *must* click the **New** icon in the **Opportunities List** view or the **Opportunity Header** view.
    - If you attempt to advance to another screen without saving your changes, the following message is displayed, "You have unsaved changes. Continue?"
      - Click **Cancel** to return to the screen and save your changes.
      - Click **OK** to continue *without* saving your changes.

Creating an opportunity - Fast Path

If you use the same accounts repeatedly in creating opportunities, you can quickly create new opportunities using the **Account** tab. From the **Accounts** tab, you can now see any accounts where the account record, opportunities, or contacts have been created by someone in your firm, or where anyone in your firm is on the sales team

Note: You can only create opportunities for accounts you have used before from this tab. If you are creating an opportunity for a new account, use the **Opportunities** tab.
To access this view:

1. Click the **Accounts** tab.
   A list of your accounts is displayed.
   Note: The **Organization** column, in the **Accounts** view, can have one of three different types of values:
   - If the field shows the name of your firm, these are accounts your firm has created and you are still able to modify.
   - If there is a country code in this field, i.e., US, the account is in the IBM account list and you are not able to modify it.
   - If there is another Business Partner's name in this field, this indicates the account was created by that Business Partner firm and someone from your firm is on the Sales Team. You can't modify these accounts.

To create an opportunity for one of your accounts:

2. Click the hyperlink in the **Account Name** field.
3. Click the **Opportunities** view tab.
4. Click **New**.
   The Opportunity applet is displayed.
5. Enter a description of the opportunity in the **Description** field.
6. Select a **Sales Stage** field value for the opportunity.
   The estimated odds of winning the opportunity, for example, 0% (default), 10%, 25%, 50%, 75% or 100%. As the sales stage progresses, additional fields are required and must be completed before the opportunity can be saved. Refer to the SSM education material for definitions of SSM Stages. You assign these odds to the opportunity. Always attempt to accurately reflect the probability of winning the opportunity in this field. You should continue to update the odds as the opportunity progresses
7. Complete the required fields that are marked with a red asterisk (*).
   Notes:
   - See the topic Attaching supporting documents in this document for information about adding attachments.
   - See the topic Adding notes in this document for information about adding notes to the opportunity.
   - See the topic *Sharing your opportunity data with IBM* in this document to determine how to set the **Work in GPP** and **Is Restricted** fields.
   - See the topic Adding contacts to an opportunity in this document for information about how to complete the **Customer Contact** field.
   - See the topic Adding sales team members in this document for information about how to add team members to an opportunity.
8. **For U.S.A. opportunities only**, if applicable, IBM will contact the Business Partner regarding ITAR compliance. To review ITAR information, refer to the Online Help topic, *Using International Traffic Arms Regulation (ITAR) opportunities.*
9. Click **Save**.
   An opportunity is created and saved.
   Notes:

- **DO NOT** use the **Menu** icon to create opportunity records using **New Record** or **Copy Record**. To create new opportunity records, you *must* click the **New** icon in the **Opportunities List** view or the **Opportunity Header** view.
- If you attempt to advance to another screen without saving your changes, the following message is displayed, "You have unsaved changes. Continue?"
  - Click **Cancel** to return to the screen and save your changes.
  - Click **OK** to continue *without* saving your changes.

Creating child opportunities

What are child opportunities?

A child opportunity is created from an existing opportunity. The existing opportunity is referred to as the "parent" and the created opportunity is referred to as the "child" opportunity. A child opportunity is used to indicate that a new opportunity record is related to another, separate opportunity record. It is possible to have several "child" opportunity records associated with a specific "parent" record, but each "child" record can have only one "parent" record. This functionality provides you with the flexibility to manage revenue records separately, yet have them tied to the same parent opportunity.

To create a child opportunity:

1. From the main (parent) opportunity record, click the **Child Opportunity** view tab.
2. Click **New** to create the child opportunity.
   A child opportunity record is created. You must complete the required fields of the opportunity and save the opportunity.
   Notes:
   - The **Parent Name** field of the child opportunity contains the opportunity number of the parent opportunity.
   - A child opportunity cannot have child opportunities of its own.
3. Click the hyperlink in the **Opportunity Num** field to access the new child opportunity record.
4. Click the **Sales Stage** field and update the sales stage to the appropriate value.
   Note: The default value, for the child opportunity sales stage, is **01-Noticing**. You *must* advance the sales stage in the child opportunity record to at least the same sales stage as the parent opportunity.
5. Click the **Sales Team** field control icon to assign sales team members to the opportunity and grant access to the child opportunity to other users.
   Note: The parent opportunity owner is the sales team member who can create child opportunities. The initial child opportunity is created with a sales team containing *only* the opportunity owner of the parent opportunity.
6. Click the fields, described in the table below, to change their values from the default values to a more appropriate value.
7. Click the **Revenues** view tab to add your revenue record. Since this is a new opportunity, no other Business Partner will be able to see your information.

Finding an Account

Finding an account from the Account screen

From the **Accounts** tab, you can see any accounts where the account record, opportunities, or contacts have been created by someone in your firm, or where anyone in your firm is on the sales team.

Notes:

- You can also quickly and easily create opportunities for these accounts from this view.
- You can only create opportunities for accounts you have used before from this tab. If you are creating an opportunity for a *new* account, use the **Opportunities** tab. See the topic *Creating an account from the Opportunity screen*.

To find existing accounts that you use frequently:

1. Click the **Accounts** tab.
   A list of your accounts is displayed.
2. Scroll or use **Query** to locate accounts that you frequently use, but are not displayed on the initial screen.
   Note: The **Organization** column, in the **Accounts** view, can have one of three different types of values:
   - If the field shows the name of your firm, these are accounts your firm has created and you are still able to modify.
   - If there is a country code in this field, i.e., US, the account is in the IBM account list and you are not able to modify it.
   - If there is another Business Partner's name in this field, this indicates the account was created by that Business Partner firm and someone from your firm is on the Sales Team. You cannot modify these accounts.

Finding an account from the Opportunities screen

Note (Europe only): Business Partners defined within certain countries in Europe can now select accounts from other participating countries using the same logon ID, without having to change their unique User Position. These Business Partners can also view opportunities created for those accounts.

Participating countries include: Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Latvia, Liechtenstein, Lithuania, Luxembourg, Malta, Monaco, Netherlands, Norway, Poland, Portugal, San Marino, Slovakia, Slovenia, Spain, Sweden, Switzerland, United Kingdom, and Vatican State.

To find an account for a new opportunity:

1. Navigate to the **Opportunities** screen.
2. Click **New** to create a new opportunity.
3. In the **Account** field of the new opportunity form, click the field control icon.
   Note: The account list displays only those accounts that were created and saved by your firm. If you want to use one of the accounts created by your firm, scroll through the list, and locate the account record. **Do *not*** use the **Query** function on the list window. The **Query** function on this window only searches for existing accounts in the IBM set of accounts.
   Do not type an account name in the **Account** field. A **Pick Account** applet is displayed
4. Click **Query**.
   Note: The **Query** function only searches IBM-supplied customer accounts. The **Query** function does **not** search for accounts created by your firm and not shared with IBM.
5. In the **Account** field, type the first word or at least two characters of the account name and an asterisk (*).
   Notes:
   - Narrow your search by including additional data. A search on ABC* searches for account names that start with ABC, while a search of *ABC* searches for account names that contain ABC.
   - The **Query** fields are case-sensitive.
6. To refine your search, consider entering values in the **City, Zip Code** fields, or expanding the name in the **Account** field.
7. To change the country displayed in the **Country** field:
   Note: This option is available to you, only if other countries are displayed in the **Pick Country** applet**.**
   i. Click the **Country** button.
      The **Pick Country** applet is displayed.
   ii. Locate the appropriate country.
   iii. Click the chevron to select the appropriate country.
   iv. Click **Pick**.
      The **Pick Account** applet is displayed.
8. Click **Go**.
   The query results are displayed.
9. Scroll down the list to find the account with the desired address.
10. Click the list chevron to select the account record.
    The background of the account record is highlighted in yellow.
    Note: You can also click the + symbol in the upper right hand corner of the screen to scroll through the list of accounts.

11. Click **OK**.
    The account record is filled in on your opportunity.

Creating an account from the Opportunity screen

Business Partners should always try to find an account before creating a new one in Global Partner Portal. Even though you seldom create them, if no customer account record exists for the end user customer of the opportunity, you can create an account. You *must* create an account from the **Opportunities** screen.

📖 **Note:** Do **not** create accounts on the **Accounts** tab. You can view accounts that you have used previously on that screen, but **do not** create new accounts on the **Accounts** tab**.**

To create an account from the **Opportunities** screen:

1. Search for an account in the **Opportunities** screen. Use the procedure in the topic *Finding an account* in this document.
2. If an exact address match for the account does **not** exist, create a new account starting at the **Pick Account** applet.
3. Click **New**.
   The **Pick Account** applet is displayed.
4. Type the customer's full legal name in the **Account** field.
5. Type the correct information in the other fields.
   📖 **Note**: The **Address**, **City**, and **Country** fields are required.
6. Click **Save**.
   The new account is now displayed in the **Pick Account** applet.
   📖 **Note**:
   a. If the account is not already selected, click the list chevron ❯.
      The background of the account record is highlighted in yellow.
   b. Click **OK**.
      The account record is displayed in your opportunity.

Attaching supporting documents

Attachments are documents that can be stored with the opportunity in Global Partner Portal. Programs, such as SVI or BCC (North America only), have requirements for the type of information that should be attached to the opportunity. The attachment function allows you to embed the information in the opportunity. Business Partners use attachments to provide proof of their involvement in a deal and to demonstrate their participation in or development of the opportunity.

📖 **Note**: Any opportunity sales team member who has edit access to the opportunity can add an attachment to the opportunity.

To attach documents to an opportunity:

1. Click the **Opportunities** screen tab.
2. Scroll down the list of opportunities or click **Query** to find your opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Attachments** tab in lower half of the **Opportunity Detail** form applet.
   The **Attachments** view and the list of current attachments are displayed.
5. Click **New**.
   A blank attachment form is displayed.
6. Click the **Attachment Name** field control icon .
   The **Add Attachment** applet is displayed.
7. Click **Browse** and find the attachment on your local drive.
8. Highlight the file, and then click **Open**.
9. Click **Add**.
   The **Attachment** view is displayed, and the attachment is displayed in the **Attachment Name** field.
10. To add a comment:
    a. Click the **Comments** field.
    b. Type the note or comment.
11. To share the attachment with IBM, select the **Release to IBM** check box.
    This check box *only* controls whether IBM can view the attachment. If the checkbox is clear, IBM cannot view the attachment, even if they are on the sales team. The members of your sales team that are not from IBM (including members added from another Business Partner organization for collaboration purposes) can view the attachment regardless of whether the checkbox is checked or unchecked.
12. Click **Save** in the **Attachment** view.
    📖 **Notes**:
    If you have a large file or a large number of files to attach:
    1. Zip the files that you want IBM to see together and add the zip file as one attachment
    2. Select the **Release to IBM** checkbox.
    3. Zip the files that you do not want to release to IBM to another zip file and attach the zip file to the opportunity, but do not select the **Release to IBM** checkbox. IBM is not able to view the attached file.

    Do **not** attach executable software application files as attachments. Because of the hazards involving viruses, worms, and spyware, executable files should not be attached.

Adding notes

Use the notes function to document changes, record important information, and communicate critical information with the IBM sales team.

OM users use opportunity notes for different purposes. SVI and BCC (BCC is North America only) do not use the **Notes** function.

- For OM, the **Notes** tab can be used to communicate with the IBM sales team. Use the category BP Comments for information about the opportunity.

To add notes to an opportunity:

1. Click the **Opportunity** screen tab.
   The **Opportunities List** view is displayed.
2. Find the opportunity in the list or click **Query** to find the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity is displayed.
4. Click the **Notes** view tab in the lower applet.
   The **Notes** view is displayed.
5. Click **New**.
   The **Notes** form is displayed.
6. Click the **Type** field list arrow.
7. Click the correct note type. The note type is a required field.
   Note: The note type is different in Global Partner Portal for SVI and OM.
8. Click the **Description** field.
9. Type the note.
10. Click **Save**.
    The note is displayed in the **Notes** view tab.

📖 **Notes**:

- After the opportunity is submitted, the note records become read only.
- Opportunity notes do **not** flow from Global Partner Portal to IBM's CRM system when opportunity information flows.

Sharing your opportunity data with IBM

In Global Partner Portal, you have a choice to share opportunity data with Customer Relationship Management (CRM), IBM's Opportunity Management system used by IBM's internal sales force.

When you create an opportunity, you can decide to share an open opportunity fully (Full Disclosure), partially (Is Restricted), or not share with IBM's CRM system (Work in GPP) and direct sales team. You can select the **Work in GPP** or **Is Restricted** settings *only* for opportunities that you create. The **Work in GPP** check box can only be selected at the time of opportunity creation; however, it can be turned off at any time. Opportunities that IBM users enter and assign to you cannot be set to either of these settings.

📖 **Note**: Opportunities created before this release default to *Work In GPP*.

Opportunity Creation:	Disclosure settings:	CRM visibility results
Created in Global Partner Portal by the Business Partner	**Is Restricted** - unchecked **Work in GPP** - unchecked 🕮 **Note:** Defaults to Full Disclosure	Global Partner Portal Opportunity record id fully visible in IBM's opportunity management system throughout sell cycle.
Created in Global Partner Portal by the Business Partner	**Is Restricted** - checked **Work in GPP** - checked	Global Partner Portal Opportunity record becomes fully visible in IBM's opportunity management system once the Global Partner Portal opportunity has been coded as Sales Stage of 07-Won/Implementing or 11-Lost to Competition, but the customer name and contact is blocked from view.
Created in Global Partner Portal by the Business Partner	**Is Restricted** - checked **Work in GPP** - unchecked	Global Partner Portal Opportunity record is visible in IBM's opportunity management system throughout sell cycle, but customer name and contact is blocked from view.
Created in Global Partner Portal by the Business Partner	**Is Restricted** - unchecked **Work in GPP** - checked	Global Partner Portal Opportunity record becomes fully visible in IBM's opportunity management system once the Global Partner Portal opportunity has been coded as Sales Stage of 07-Won/Implementing or 11-Lost to Competition.
🕮 **Note for BCC users** (North America only): Created by the Business Partner in response to BCC certification review request	**Is Restricted** - checked **Work in GPP**- checked	Global Partner Portal Opportunity Record will not be moved over to IBM's opportunity management system.
Created in CRM by IBM employee and passed to the Business Partner	**Is Restricted** - unchecked **Work in GPP** - unchecked 🕮 **Note**: Defaults to Full Disclosure	Global Partner Portal Opportunity record is fully visible in IBM's opportunity management system throughout the sell cycle.

For all opportunities, regardless of which boxes are checked, IBM Channel employees or collaborating Business Partners who are added to the opportunity sales team have visibility to the opportunity data, provided they have access to Global Partner Portal. To control access and visibility to opportunity components and information, see additional information in the topic *Creating child opportunities* in this document.

🕮 **Note**: When an opportunity is created, if you do not want the opportunity shared with IBM's CRM system, check the **Work in GPP** flag. If you have not checked the **Work in GPP** flag, you receive a warning message.
If you do not wish to restrict, click **OK**, the record is saved and the data is shared with IBM's CRM system.
If you would like to share the opportunity with the IBM's CRM system, but partially restrict it, click **Cancel** to set the **Is Restricted** flag. Again, you receive a warning message. Click **OK** to proceed.
🕮 **Note on Attachments**: The **Is Restricted** and **Work in GPP** fields do not impact attachments. If you want an attachment to be visible for IBM employees managing the SVI or BCC (North America only) programs, you must select the **Release to IBM** check box.

Adding contacts to an opportunity

A customer contact is the person you call to make a sale at the account. Contacts are different from the opportunity team members that are added in the **Sales Team** field. Do not use the **Contact** field to add Business Partners employees; use the **Sales Team** field to add Business Partner employees to the opportunity.

To add a contact to an opportunity:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Scroll down the list of opportunities to find your opportunity, or click **Query** and find the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Contacts** view tab in the lower half of the applet.
   The **Contacts** applet is displayed.
5. Click **New** in the **Contact** view.
   The **Add Contacts** applet, which contains a list of the existing contacts, is displayed.
6. To add a contact from the list:
   a. Select the check box beside the contact record.
   b. Click **OK**.
   The **Contacts** view is displayed and the new contact is added.
7. To create a new contact:
   a. Click **New** in the **Add Contacts** applet.
   The new **Contact** data entry applet is displayed.
   b. Complete the fields:
      - **Last Name***
      - **First Name***
      - **Email**
      - **Work Phone #**
      - **Mobile Phone #**
      - **Alt Language Last Name** (if applicable)
      - **Alt Language First Name** (if applicable)
      - **Job Title**
        🕮 **Note:** The **Last Name** and **First Name** are required fields (*).
   c. Click the **Address Line 1** field control icon to select an address different than the default.
   d. Click the appropriate checkbox for the following:
      - **Never Mail**
      - **Call**
      - **Never Call**
8. Enter any comments as necessary.
   🕮 **Notes**:
   - First, ensure that the **Country** field is correct before entering any address information. The **Country** field determines the values displayed in the **State** field.
   - Only customer contacts should be added to the Contacts section. Use the **Sales Team** view to add Business Partner employees that belong to the Business Partner firm.
9. Click **Save**.
   The opportunity contacts are displayed, and the new contact is added.

Adding Sales Team members

When you create an opportunity in Global Partner Portal, you are automatically the owner of that opportunity. Using the **Sales Team** field control, the opportunity owner or Opportunity Focal Point can add sales (opportunity) team members from their own organization or IBM Channel Representatives. For more information about adding a sales representative from another Business Partner, see the topic *Adding sales team members from another Business Partner*.

Note: When you add sales representatives from your firm or IBM Channel Representatives to your sales team, the following conditions apply:

- Sales team members are added to the opportunity by the opportunity owner or creator. For example, opportunity owners can add new members to the team, modify data, and attach documents. They can also submit an opportunity in response to a Bid Certification Request.
- All sales team members with update access to the opportunity sales team can add other employees from their organization to the sales team.
- Employees who are designated as an organization's Opportunity Focal Point can update the sales teams about their organization's opportunities.

Note: You can only add IBM employees to the opportunity sales team who are enabled on Global Partner Portal, which includes IBM Channel Reps and Business Partner Software Sales Reps (SSR-BPs).

Adding sales team members from your firm or IBM Channel Representatives

Note: If you are designated as the opportunity owner, you can add an IBM Channel Representative to the sales team for the opportunity. If you are not the opportunity owner, you cannot add IBM Channel Representatives and you can view only individuals in your organization. IBM Channel Rep is displayed in the **Position** field for IBM Channel Representatives and they have read-only access to the opportunity.

To add a sales team member from your firm or an IBM Channel Representative:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Find the opportunity or click **Query**.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Sales Team** control icon on right side of the opportunity header.
   The **Team Members** applet is displayed and your current sales team members are listed.
5. Click **Add** to add a new Sales Team member.
6. Click **Query**.
   a. To find your IBM Channel Rep, complete the fields in the form.
      Note: Query for **Position** starting with IBM Channel. The query fields are case-sensitive. (To add a member of your own firm, scroll through the list or query on the **Last Name** field.)
   b. Type IBM Channel* in the **Position** field.
   c. Click **Go**.
      The query results are displayed.
7. Select the check box beside the sales team member record that you want to add to the opportunity.
8. Click **OK**.
9. Click the **Role** field arrow.
10. Click the appropriate role for the team member.
    For example, if you are influencing the opportunity, select the role:
    - **ISV Partner**, if you are working on the opportunity as an Independent Software Vendor. See the topic *Entering the Opportunity Influencer* in this document.
    - **Syst Integrator-SI Consultant**, if you are working as a System Integrator or Consultant. See the topic *Entering the Opportunity Influencer* in this document.
11. Click **OK**.
    The Sales Team view is displayed with the new sales team member.
12. Repeat steps 5 through 10 for adding other sales team members.
13. Click **Save**.
    An email message is sent to the new sales team member from your firm notifying them that they have been added to the sales team. No action is required on their part. The opportunity is automatically "accepted." Email notifications are not sent to IBM Channel Representatives.

Adding sales team members from another Business Partner

If your firm and another Business Partner firm have established a collaboration, you can add sales team members from another collaborative Business Partner organization to the opportunity sales team. Collaboration provides you with a wider set of resources for the opportunity sales team, such as employees of other Business Partners that have already established a collaboration relationship with your firm.

Note: A collaboration agreement must be set up between your organization and the other Business Partner organization prior to you executing these steps.

To add a sales team member from another Business Partner organization:

1. Click the **Opportunities** screen tab.
   The Opportunities screen, My Opportunities view, which contains a list of opportunities, is displayed.
2. Find the opportunity or click **Query**.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click **Collaborate**.
   The list of individuals from outside your organization that have been established through collaboration and that are available for you to add to opportunity sales teams, is displayed. You can find a specific record by scrolling through the list of sales representatives, using the **Query** function, or using the **Find** and **Starting with** field search function.
   Note: If you do not see the organization or employee that you are looking for, a collaboration with that Business Partner organization has not been established.
5. Find the Opportunity Focal Point from the other Business Partner firm that you want to add to the opportunity sales team.
6. Click the checkbox next to the Opportunity Focal Point that you want to add to the opportunity sales team.
7. Click **OK**.
   The Opportunity screen is displayed.
   An email message is sent to the new Sales Team member notifying them that they have been added to the sales team. No action is required on their part. The opportunity is automatically "accepted."
8. To verify the Sales Team is complete:
   a. Click the **Sales Team** control icon.
      The members of the sales team, including the Business Partner employees, are displayed in the sales team applet.
   b. Click **OK** to close the applet.
   c. Click **Save**.

Note: Opportunity Owners or Opportunity Focal Points can add or delete members of the sales team.
After a Business Partner firm has been added to the sales team, the individual added can add additional sales team members from within their firm.

Adding revenue records with brand families

The opportunity record has two parts: the header record and the revenue record. The revenue record contains information about IBM products or services that are being sold.

Notes:

- For BCC (North America only), revenue records are not required.
- For OM or SVI opportunities at Sales Stage 04-Validated/Qualified or higher, the revenue record must be included in an opportunity.

To add a revenue record:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of your opportunities, is displayed.
2. Scroll down the list of opportunities to find your opportunity or click **Query** to search for the opportunity.

3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. If your opportunity has an existing revenue record, click the **Revenue** view tab in the lower half of the screen.
   If your opportunity does not have an existing revenue record, click the **Detailed Revenue Data** field control icon to create a revenue record.
   The **Revenue** applet is displayed.
5. Click **New** on the **Revenue** view.
   A new **Revenue** applet is displayed
6. Click the **Type** field control icon.
7. Click the list chevron beside the correct type.
8. Click **OK**.
9. Click the **Brand Family** field control icon.
10. Scroll down the list of Brand Families to find your Brand Family or click **Query** to search for the **Brand Family**.
11. Click the chevron beside the Brand Family.
    Note: The **Brand**, **Brand Family SVI Participation,** and **Brand Certification Achieved** fields are completed automatically where applicable, after the revenue record is saved.
12. **Click OK.**
13. Complete the **Bill Date** (if different from the default date, which is 90 days from the date that the record is created), **Win Probability**, **Quantity**, and **Price** fields. The **Revenue** field in the revenue record is automatically calculated from the **Quantity** and **Price** fields.
14. If applicable:
    a. Click the **Flowcode** field list arrow.
    b. Click the appropriate flowcode value.
    c. Click the **Platform** field list arrow.
    d. Click the appropriate platform value.
15. Click **Save** on the **Revenue** view.
16. To update the **Revenue** field on the opportunity header record, click **Recalculate Revenue**.
    Note: The **Revenue** field in the opportunity header record is not automatically updated when you create or update revenue records. To update this field, if you do not see a **Revenue** view tab:
    a. Exit the opportunity record.
    b. Reselect the opportunity.
    c. Open the **Revenue** tab.
    d. Click the **Recalculate Revenue** icon.
17. Click **Save**.

Notes:

- You must add a separate revenue record for each Brand Family included in the opportunity. However, you can include only one revenue record per Brand Family per opportunity.
- Bill Date is the forecast date when revenue is expected to flow for this revenue record line item.
- The Win Probability is your assessment of the chance that you will close the opportunity. The **Probability %** field entered on the opportunity header is the odds for the overall opportunity. If you have multiple line items in your **Revenue** view, you can assign different percentage odds to different revenue components of the opportunity.
- If the currency in the **Opportunity Currency** field in an individual revenue record is different from the currency in the **Opportunity Currenc**y field in the opportunity header record, when you click **Save**, the currency in the revenue record will be refreshed to match the currency in the opportunity header record. This only changes the **Opportunity Currency** field and does not recalculate the value in the **Revenue** field of the revenue record.
- Child opportunities can be used to allow differing access and visibility to an opportunity's components among the sales team members. To understand and use child opportunities, see the topic *Creating child opportunities*.

Entering the opportunity influencer

If a Business Partner is influencing the opportunity, add the influencing Business Partner to the opportunity Sales Team and select a **Role** of either *ISV Partner* or *Systems Integrator/SI Consultant* using the following instructions.

Updating the Influencer job role on the Sales Team:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Find the opportunity or click **Query**.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Sales Team** control icon on right side of the opportunity header.
   The Team Members applet is displayed and your current sales team members are listed.
5. Click the **Role** field arrow.
6. Click the appropriate role of the sales team member.
   For example, if you are influencing the opportunity, select the role:
   - **ISV Partner**, if you are working on the opportunity as an Independent Software Vendor
   - **Syst Integrator-SI Consultant**, if you are working as a System Integrator or Consultant
7. Click **OK**.
   The Sales Team view is displayed with the updated sales team member role.
8. Click **Save**.

Using Business Partner opportunity numbers

To facilitate integration between a Business Partner's internal CRM or Opportunity Management system and Global Partner Portal, Business Partners can enter their firm's opportunity numbers in Global Partner Portal. This allows Business Partners to insert and search for their opportunity number in the My Opportunities view rather than using the IBM opportunity number.

The Business Partner's internal opportunity number is recorded in the owner's applet of the sales team record. After the opportunity number is entered, the opportunity number of the opportunity owner (sales team member with the primary checkmark) is displayed on the opportunity header in the **Owner BP Oppty Number** field. If other Business Partner firms are collaborating on the opportunity and participate on the sales team, each firm's opportunity number can be entered. The **Owner BP Oppty Number** is an optional field.

To add your opportunity number to an opportunity:

1. Click the **Sales Team** field control on the opportunity header applet.
2. Click the **BP Oppty Number** field.
   Note: This is an optional field.
3. Type your opportunity number.

Note: If other Business Partner firms are collaborating on the opportunity and participate on the Sales Team, each firm's opportunity number can be entered. The opportunity number of the opportunity owner (sales team member with the primary checkmark) is displayed on the header in the **Owner BP Oppty Number** field in the opportunity header record.

Note: If more than one employee from the same Business Partner organization is on the sales team, the opportunity numbers for a single opportunity must be the same.

In addition to using your opportunity numbers in the **BP Oppty Number** field in Global Partner Portal, you can define meaningful codes and values, associate them to opportunities, and query using your own internally defined codes. To use an opportunity Classification ID, refer to the topic *Using the opportunity Classification ID*.

Using Sales Connections

Note: The **Sales Connections** function might not be available for use by all Global Partner Portal users.
Premier, Advanced, and PartnerWorld Industry Network (PWIN) Business Partners can receive help from IBM's Sales Connections Team. Business Partners can leverage this consultative service to quickly connect with experienced IBM sales representatives and specialists worldwide. These IBM

sales representatives and specialists can leverage their existing customer relationships or skills to help Business Partners close qualified sales opportunities faster.

To add Sales Connections to an opportunity:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of your opportunities, is displayed.
2. Scroll down the list of opportunities or click **Query** to find the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click the **Submit to Sales Connections** icon near the top next to the **Collaboration** icon
   The Sales Connection Team is added to the sales team and the Sales Connection Team is now visible to the Business Partners from either the **Sales Team** field control icon or **Sales Team** tab. You will be contacted by the local Sales Connections team within 3 business days to begin the process.

For more information on Sales Connections, click http://www.developer.ibm.com/marketing/industrynetworks/salesconnections.html

Using Attach Connector

Attach Connector is a Web application that brings IBM brand information together in one place. This tool helps increase attach rate revenue by guiding users through relevant discussions with clients. With Global Partner Portal, IBM Business Partners can now link from Global Partner Portal to the Attach Connector Web site. For more information, click Attach Connector, which is on the PartnerWorld Web site. After you link to Attach Connector, you must use your PartnerWorld User ID and password to access the Attach Connector tool.

To use Attach Connector:

1. Create the opportunity.
2. Create a revenue record and select the product.
3. Click **Launch Attach Connector**.
   📖 **Note**: The **Launch Attach Connector** icon is displayed only on the **Revenues** view tab.
   A new window opens for Attach Connector.
4. If prompted, reenter your PartnerWorld User ID and password in the Attach Connector log in screen.
5. Find your solution in Attach Connector and find the most common Attach Elements.
6. When you finish your research, close the **Attach Connector** window and return to work in Global Partner Portal.
   📖 **Note:** When you select another tab in Global Partner Portal, Internet Explorer automatically closes the **Attach Connector** window. If you are using Mozilla or Firefox, you might need to close the window.

Using the opportunity Classification ID

Adding the Classification ID to the opportunities:

Once the classification structure is established and entered into Global Partner Portal by the Business Partner Administrator or Opportunity Focal Point, you can add the appropriate classification ID to your opportunities in the **Sales Team** field.

1. In the opportunity record, click the **Sales Team** field.
2. Click the **Classification ID** field control icon.
   The **Opportunity Classification** window is displayed.
3. Click the chevron in front of the proper Classification ID.
   The Classification ID record is highlighted.
4. Click **Save**.
5. Click **OK**.
   The Classification ID is associated with the opportunity through the sales team member.

Reporting and using the Classification ID to find opportunities:

From the **Opportunity List** view, you can use the classification ID to query for specific categories of opportunities.
For example, in the scenario, to query for all opportunities associated to sales manager Jon Doe:

1. From the **Opportunity List** or **Pipeline** views, click **Query**.
   The Opportunity query window is displayed.
2. Click the **Classification ID** field.
3. Type your query criteria. In this example: ??-???-JD*.
   📖 **Note:** Use wildcard characters, including the asterisk and question mark, to help you narrow the results of the query. This query searches for all opportunities for sales manager Jon Doe. It is recommended that you put an asterisk at the end of the search criteria.
4. Click **Go**.
   The opportunities matching the query criteria are displayed.

📖 **Note:** You can export the resulting opportunity records from the query.

Searching for an opportunity

You can use several methods to search for an opportunity. The easiest method is to perform a simple query, using only one field. A simple query can be defined by a date range, sales stage, or a revenue amount range.

To perform a query:

1. Click the **Opportunity** screen tab.
   The Opportunities screen, My Opportunities view, which contains a list of opportunities, is displayed.
2. Use one of the following methods to initiate a query:
   a. In the **Opportunities** screen, click **Query**.
      A blank form is displayed.
   b. Type the query criteria in the appropriate fields.
      📖 **Note**: Queries are case-sensitive. You can use lower and upper case criteria.
      Some examples include:
      - To find opportunities created within a date range, use the formula >=4/10/06 and <=4/15/06.
        This yields all opportunities that were created within this date range.
      - To find a revenue range, use the formula >=100000 and <=500000.
        This yields all opportunities within the range of $100,000 and $500,000.
3. When you are finished typing the query criteria, click **Go**.
   The query results are displayed.

Tips for queries:

- Input as much criteria as you know about the opportunity to shorten the search time.
- Use receding wild cards when possible, for example, ABC Corp*. Wild cards at the end of a name helps find extra names. For example, Smith* finds Smith and Smithe.
- Replace non-alphanumeric characters with the wild card "*". For example, to find O'Brien, type O*Brien or O*Bri*.

Viewing and exporting pipeline views

To give you a complete view of the entire opportunity record that includes the opportunity header and revenue record, you now have available new views for pipeline management. The default view is **All Pipeline**. You can also select other pipeline queries which are explained below. These views can be exported easily into spreadsheet format.

Revenue Pipeline view

To view the revenue pipeline:

1. Click **Opportunities** screen tab.
   The Opportunities screen, **My Opportunities** view, which contains a list of your opportunities, is displayed.
2. Click the **Show** list arrow.
3. Select **My Opportunities Revenue Pipeline**.
   The populated pipeline report is displayed.
   📖 **Note**: The **Opportunity Pipeline Report** view could display with no data if all your opportunities are in Sales Stage 01.

Additional Queries on the Pipeline view

Additional queries are available to help you analyze your pipeline:

- All Pipeline (default query): All open, won, and lost sales stages opportunities
- Draft Pipeline: All opportunities in a Sales Stage 01-Noticing
- Lost Pipeline: All opportunities in Sales Stage 11-Lost to Competition
- Open Pipeline: All open opportunities in Sales Stage 03-Identified/Validating and Sales Stage 04-Validating/Qualifying
- Past Due Bill Date: All opportunities with a bill date that is before today's date
- Past Due Decision Date: All opportunities whose decision date is before today's date
- Won Pipeline: All opportunities in Sales Stage 07-Won/Implementing
  📖 **Note**: Please ignore any queries that do not say "(IBM Query)."

To run a pipeline query:

1. Click **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of your opportunities, is displayed.
2. Click the **Show** list arrow.
3. Select **My Opportunities Revenue Pipeline**.
   The **Opportunity Pipeline Report** view is displayed with no data.
4. Click the **Queries** field list arrow.
5. Select the query.
   For example, for the Past Due Bill Date query, opportunities that require updating are displayed.

📖 **Note**: You can also click **Query** and type your criteria for reporting the pipeline.

Exporting your opportunities list

To export your pipeline view or any view:

1. Run the query to display the desired results.
2. In the **Menu** field, click **Export**.
   The **Export** window is displayed.
3. Under **Rows to export**, click **All Rows in Current Query** to export all rows or click **Only Current Row** to export a specific row.
4. Under **Columns to Export**, click **All** to export all available columns or click **Visible Columns** to export only the columns you see on the screen.
5. Under the **Output Format**, select the appropriate output format.
6. Click **Next**.
7. Click **Save**.
8. Save the file to your local system.

Receiving opportunities from IBM

An automated e-mail is sent to the designated Opportunity Focal Point alerting them that an opportunity requires action in Global Partner Portal. Business Partners can be added to an IBM-created opportunity passed from the IBM CRM system. When you are added to an opportunity, the opportunity is displayed in your **My Opportunities** view in Global Partner Portal. "Pending Acceptance" is displayed in the **GPP Oppty Accept Status** field of the opportunity.

You have **five** business days to accept these opportunities from IBM before they are moved to a withdrawn status. If the opportunity is in rejected or withdrawn status, you can no longer view it in Global Partner Portal.

📖 **Note to the Opportunity Focal Point**: If the opportunity requires acceptance by a sales representative in your firm:

1. Add the representative to the opportunity sales team.
2. Notify the representative to review the opportunity.
3. Either you, or the representative from your firm that you assigned to the opportunity as owner, must accept or reject the opportunity within 5 business days from the date it was assigned to your firm. The email you receive indicates the date when you must respond.

📖 **Note:** If you are assigned ownership of an IBM opportunity, you must accept the ownership, before you make any changes to it. If you make changes to the opportunity without accepting it, the changes to the opportunity do **not** flow to IBM's CRM system.

If you receive an opportunity from IBM, you see a note in Global Partner Portal with unformatted information about the sales team members that were in the opportunity in IBM's CRM system.

To view the note:

1. From the **Opportunity** list view, click the blue hyperlink in the **Opportunity Num** field of the desired opportunity.
   The opportunity is displayed.
2. Click the **Notes** view tab in the lower applet.
   The **Note** is displayed.
   Here is an example of what the note might look like:

Previous Primary: Juliet N.Hayes1+19ky+15684152944761Last Updated: 2006-12-22-08.00.48.000000, Sales Team: Juliet N.Hayes1+19ky+1568 4152944761 Last Updated: 2006-12-22-08.00.48.000000, Sales Team: John R.Nellist1-831c-202 3125291548 Last Updated: 2007-02-16-08.10.03.000000, Sales Team: AlexKramer1-831c-45 2138104389 Last Updated: 2007-03-09-08.08.06.000000, Sales Team: Robert W.Buerkle1-a33t-513 6022172687 Last Updated: 2007-02-23-07.54.57.000000, Sales Team: Clayton A.Henke2-lv0454 8777392926 Last Updated: 2007-02-16-08.02.30.000000, Sales Team: Ralph W.Hueske1-2myrdx 4843354290 Last Updated: 2007-03-02-08.04.43.000000, Sales Team: Sharon S.Deptula1+19kw+2333 2485525538 Last Updated: 2007-03-02-07.58.52.000000, Sales Team: John J.Stevens1-2myom0 4049215529 Last Updated: 2006-07-14-07.04.16.000000,

- The first name in the note is the previous Opportunity Owner (primary), in other words, the person who sent you this opportunity. In this example, Juliet N. Hayes is the previous Opportunity Owner,
- The record number of the Sales Team member is displayed after Sales Team member name for example: 1+19ky+1568. Ignore these characters in the note.
- Following the previous Opportunity Owner are the names of the sales team members. In this example, they are: Juliet N Hayes, John R. Nellist, Alex Kramer, and so on.
- The phone number for the IBM employee is the ten digits following their name just before the phrase "Last Updated". For example, Previous Primary: Juliet N. Hayes phone number is 415-294-4761.
- To locate additional contact information about a name in the list, see the IBM Employee Directory.

Accepting an IBM opportunity

After receiving a new opportunity e-mail, the Business Partner accesses Global Partner Portal to accept the opportunity. The new opportunities are visible in the My Opportunities screen.

Important: The Business Partner has **five** business days to accept the opportunity before it is withdrawn. The email you receive indicates the date when you must respond.

📖 **Note:** If you are assigned ownership of an IBM opportunity, you must accept the ownership, before you make any changes to it. If you make changes to the opportunity without accepting it, the changes to the opportunity do **not** flow to IBM's CRM system.

To view the opportunity:

1. Click the **Opportunity** screen tab.
   The Opportunities screen, My Opportunities view is displayed.
2. Click the sort **Up Arrow** in the **New** column.
   The list of opportunities are sorted and the new opportunities are at the top of the view. New opportunities are indicated by an asterisk (*) in the **New** column. 📖**Note:** You may need to change your Columns Displayed in order to view the **New** column.
3. To view the opportunity record, click either the opportunity or the **Opportunity Num** field.

To accept the opportunity in the opportunity record:

1. Click the **GPP Oppty Accept Status** field list arrow.
   The list of opportunity accept statuses is displayed.
2. Click **Accepted**.
3. Click the **Save** icon.

To accept the opportunity in the Opportunities view:

1. Click the chevron next to the opportunity.
   The opportunity record is selected and highlighted with a yellow background.
2. Click the **GPP Oppty Accept Status** list arrow.
3. Click **Accepted**.
4. Click the **Menu** icon.
5. Click **Save Record**.

Rejecting an opportunity from IBM

After you review an opportunity and decide that you cannot fulfill the requirements, you can reject it.

Important: You should always try to contact the customer before accepting or rejecting an opportunity.

Notes:

- The Business Partner has **five** business days to accept the opportunity before it is withdrawn. The email you receive indicates the date when you must respond.
- If you are assigned ownership of an IBM opportunity, you must accept the ownership, before you make any changes to it. If you make changes to the opportunity without accepting it, the changes to the opportunity do **not** flow to IBM's CRM system.

To view the opportunity:

1. Click the **Opportunity** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Click the sort **Up** arrow in the **New** column.
   The list of opportunities are sorted and the new opportunities are at the top of the view. New opportunities are indicated by an asterisk (*) in the **New** column.
3. To view the opportunity record, click either the opportunity or the **Opportunity Num** field.

To reject the opportunity from the opportunity record:

1. Click the **GPP Oppty Accept Status** field list arrow.
   The available statuses are displayed.
2. Click the status that indicates why the opportunity is rejected.
3. Click the **Save** icon.

To reject an opportunity from the **Opportunities** list view:

1. Click the chevron beside the opportunity to be rejected.
   The opportunity record is selected and highlighted with a yellow background.
2. Click the **GPP Oppty Accept Status** field list arrow.
   The available statuses are displayed.
3. Click the status that indicates why the opportunity is rejected.
4. Click the **Menu** icon.
5. Click **Save Record**.

Note: You can view rejected opportunities for up to 24 hours.

Assigning ownership of an opportunity

The opportunity owner is reflected in the record with a check mark in the **Primary** field on the Sales Team display. By default, the individual who created the opportunity is the opportunity owner. After the opportunity is created, you can designate a new opportunity owner. Add the new owner to the sales team, and then select **Primary** to reassign the opportunity owner role.

Previously, when you wanted to engage another Business Partner in an opportunity, you had do it with phone calls. You really had no way to confirm if the other Business Partner accepted the opportunity or not. There was nothing in place to help you "close the loop." Now, you can identify opportunities and rapidly engage with other Business Partners to help you close the deal. Global Partner Portal helps ensure that when one Business Partner identifies the opportunity and passes ownership to another Business Partner, the appropriate hand-off takes place and both parties are informed.

You can pass an opportunity by assigning a new opportunity owner to either another:

- Business Partner employee in your organization.
- Business Partner in another Business Partner organization.

To assign Business Partner employee in your organization as an opportunity owner:

1. Click the **Opportunities** screen tab.
   The Opportunities screen, My Opportunities view, which contains a list of opportunities, is displayed.
2. Find the opportunity or click **Query** to locate the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. Click **Sales Team** field control icon on right side of the **Opportunity** header.
   The **Team Members** applet is displayed with your current Sales Team members.
   Note: You cannot use the **Sales Team** tab to add sales team members. Use the **Sales Team** field control icon from the Opportunities screen.
5. Find the sales team member who will be identified as primary. If the team member is not on the team, follow the instructions for Adding Sales Team Members.
6. Click the chevron beside the record that you want to make the opportunity owner or primary.
   The record is highlighted with a yellow background.
7. To select the team member as the opportunity owner or primary, select the check box in the **Primary** column.
8. Click **OK**. If the opportunity owner or primary is from another Business Partner organization, the **GPP Oppty Accept Status** for the opportunity is set to **Pending Acceptance.**
9. Click **Save**.
   The opportunity owner or primary is updated.
   An email message is sent to the sales team member notifying them that they have been designated as the Primary or Opportunity Owner of the opportunity.

To assign a Business Partner employee from another Business Partner organization as an opportunity owner:

1. Click the **Opportunities** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Find the opportunity or click **Query** to locate the opportunity.
3. To select the opportunity, click the blue hyperlink in the **Opportunity Num** field.
   The opportunity details are displayed.
4. In the Opportunity record, click **Collaborate**.
   The list of individuals from outside your organization that have been established through collaboration and that are available for you to add to opportunity sales teams, is displayed.
5. Find the Opportunity Focal Point for the Business Partner firm that you want to add to the opportunity sales team. You can find a specific record by scrolling through the list of sales representatives, using the **Query** function, or using the **Find** and **Starting with** field search function.
   Note: If you do not see the organization or employee that you are looking for, a collaboration with that Business Partner organization has not been established.
6. Click the checkbox next to the Opportunity Focal Point that you want to add to the opportunity sales team.
7. Click **OK**.
   The Opportunity record is displayed.
   An email message is sent to the new sales team member notifying them that they have been added to the sales team.
8. Click the **Sales Team** field control icon.
   The Sales Team Members applet is displayed.
9. Click the chevron next to **Opportunity Focal Point** of the other Business Partner firm that you want to be the new Opportunity Owner.
10. Click the checkbox in the **Primary** (Opportunity Owner) field.

11. Click **Save**.
    The **Primary** flag indicates the new Opportunity Owner you selected.
12. Click **OK**. The **GPP Oppty Accept Status** field for the opportunity is set to *Pending Acceptance*.
13. An e-mail message is sent to the new Sales Team member notifying them that they are the new Primary (Opportunity Owner) on the opportunity. The opportunity is now locked (except the **GPP Oppty Accept Status** field) until the new Opportunity Owner accepts or rejects the opportunity. The new Opportunity Owner has **5 days** to accept or reject their assignment as Opportunity Owner. If the new Opportunity Owner does not take action within 5 days:
    a. The opportunity reverts back to the previous Opportunity Owner.
    b. An e-mail is sent notifying the previous Opportunity Owner that the opportunity has not been responded to.
14. The new Opportunity Owner accepts or rejects the opportunity by:
    a. Clicking the **GPP Oppty Accept Status** field arrow.
    b. Clicking the appropriate statuses: **Accept**, **Reject**, or **Withdrawn**.

Notes:

- If the new Opportunity Owner rejects the opportunity, an email is sent to the previous Opportunity Owner (now Opportunity Owner again) indicating that the opportunity was rejected.
- Only the current Opportunity Owner or Opportunity Focal Point can reassign the opportunity to a new owner.

Opportunity Owner is a	**Notification and subsequent actions**
Global Partner Portal user from your organization.	An email message is sent to the Sales Team member notifying them that they have been added as the new Opportunity Owner on the opportunity sales team. No action is required on their part. The opportunity is automatically "accepted."
Global Partner Portal user from another Business Partner firm added to the Sales Team as the new Opportunity Owner. 📖 **Note:** A collaboration *must* be set up between your organization and the other Business Partner organization prior to adding another Business Partner to the sales team or assigning them as the Opportunity Owner.	An email message is sent to the Sales Team member notifying them that they are the new Opportunity Owner on the opportunity sales team. The opportunity is now locked (except the **GPP Oppty Accept Status** field) until the new Opportunity Owner accepts or rejects the opportunity. The new Opportunity Owner has 5 business days to accept or reject the assignment. If the new Opportunity Owner does not take action within 5 days: The opportunity reverts back to the previous Opportunity Owner. An e-mail is sent notifying the previous Opportunity Owner that the opportunity has not been responded to.

Passing an opportunity

In the past, when you wanted to engage another Business Partner in an opportunity, you had do it with phone calls. You really had no way to confirm if the other Business Partner accepted the opportunity or not. There was nothing in place to help you "close the loop." Now, you can identify opportunities and rapidly engage with other Business Partners to help you close the deal. Global Partner Portal helps ensure that when one Business Partner identifies the opportunity and passes ownership to another Business Partner, the appropriate hand-off takes place and both parties are informed.
You can pass an opportunity to either another:

- Business Partner in your organization.
- Business Partner in another Business Partner organization.

Another Business Partner in your organization:
To add another Business Partner from your organization to the opportunity sales team:

1. In the **Opportunity** record, click the **Sales Team** field control.
2. Click **Add** to add a new Sales Team member.
3. Click the checkbox preceding the Sales Team member you want to add.
4. Click **OK**.
5. An email message is sent to the new sales team member notifying them that they have been added to the sales team.
   📖 **Note:** No action is required on their part. The opportunity is automatically "accepted."

Another Business Partner in your organization and make them the Opportunity Owner:
To add another Business Partner from your organization to the sales team, and make them the Primary or Opportunity Owner:

1. In the **Opportunity** record, click the **Sales Team** field control.
2. Click **Add** to add a new Sales Team member.
3. Click the checkbox preceding the Sales Team member you want to add.
4. Click **OK**.
5. Click the chevron next to the Sales Team member that you want to be the new Primary.
6. Click the checkbox in the **Primary** field.
7. Click **OK**.
8. Click **Save**. The **Primary** flag indicates the new Primary or Opportunity Owner you selected.
9. Click **OK**.
10. An email message is sent to the new sales team member notifying them that they have been added to the sales team as the new Primary.
    📖 **Note:** No action is required on their part. The opportunity is automatically "accepted."

Another Business Partner in another Business Partner organization:
The following steps describe how to add another Business Partner from a different organization to the sales team.

📖 **Note:** A collaboration *must* be set up between your organization and the other Business Partner organization prior to your executing these steps. Both Business Partner firms must be enabled on Global Partner Portal and properly indicated in PartnerWorld Profiling System (PPS).
To add another Business Partner from a different organization to the Sales Team:

1. In the Opportunity record, click **Collaborate**.
   The list of individuals from outside your organization that have been established through collaboration and that are available for you to add to opportunity sales teams, is displayed.
2. Find the Opportunity Focal Point for the Business Partner firm that you want to add to the opportunity sales team. You can find a specific record by scrolling through the list of sales representatives, using the **Query** function, or using the **Find** and **Starting with** field search function.

   Note: If you do not see the organization or employee that you are looking for, a collaboration with that Business Partner organization has not been established.
3. Click the checkbox next to the Opportunity Focal Point that you want to add to the opportunity sales team.
4. Click **OK**.
   The Opportunity record is displayed.
   An email message is sent to the new sales team member notifying them that they have been added to the sales team.
   Note: No action is required on their part. The opportunity is automatically "accepted."

To make the Opportunity Focal Point of the other Business Partner firm the Primary or Opportunity Owner:

5. Click the **Sales Team** field control icon.
   The Sales Team Members applet is displayed.
6. Click the chevron next to **Opportunity Focal Point** of the other Business Partner firm that you want to be the new Opportunity Owner.
7. Click the checkbox in the **Primary** (Opportunity Owner) field.
8. Click **Save**.
   The **Primary** flag indicates the new Opportunity Owner you selected.
9. Click **OK**. The **GPP Oppty Accept Status** field for the opportunity is set to *Pending Acceptance*.
10. An e-mail message is sent to the new Sales Team member notifying them that they are the new Primary (Opportunity Owner) on the opportunity. The opportunity is now locked (except the **GPP Oppty Accept Status** field) until the new Opportunity Owner accepts or rejects the opportunity. The new Opportunity Owner has **5 days** to accept or reject their assignment as Opportunity Owner. If the new Opportunity Owner does not take action within 5 days:
    a. The opportunity reverts back to the previous Opportunity Owner.
    b. An e-mail is sent notifying the previous Opportunity Owner that the opportunity has not been responded to.
11. The new Opportunity Owner accepts or rejects the opportunity by:
    a. Clicking the **GPP Oppty Accept Status** field arrow.
    b. Clicking the appropriate statuses: **Accept**, **Reject**, or **Withdrawn**.

    Note: If the new Opportunity Owner rejects the opportunity, an email is sent to the previous Opportunity Owner (now Opportunity Owner again) indicating that the opportunity was rejected.

Updating an opportunity

In addition to fields required by the SVI or BCC programs (BCC is North America only), ensure that you are updating the key fields in the opportunity: **Sales Stage**, **Decision Date**, **Brand Family**, **Probability %**, **Win Probability**, **Quantity**, and **Price**. The Business Partner, as opportunity owner, is responsible for managing the key fields that are indicated by a red asterisk (*). This ensures that the data is current for those Global Partner Portal opportunity records that the Business Partner has chosen to share with IBM by selecting the appropriate values for the **Work in GPP** and **Is Restricted** checkboxes.

To update an opportunity:

1. Click the **Opportunity** screen tab.
   The **Opportunities** screen, **My Opportunities** view, which contains a list of opportunities, is displayed.
2. Find the opportunity that should be updated.
3. To view the opportunity record, click either the **Opportunity** or the **Opportunity Num** field.
4. Click the field that you want to update.
   For example, click the **Sales Stage** field list arrow to select a new sales stage.

Note: Depending on the sales stage, more fields are usually required.

Key fields to keep updated include:

- **Sales Stage**: The progression and resolution of the sales cycle status is recorded by advancing the Sales Stage. As the sales activities progress, the Business partner should update the opportunity record in Global Partner Portal to the next Sales Stage. You should always update the Sales Stage first because it determines which additional fields are required to save the record.
  Notes:
  - The opportunity owner is responsible for the integrity of the information in the opportunity record and for making any sales stage changes, including closing an opportunity as *Won* or *Lost*.
  - For BCC opportunities (North America only), you must set the **Sales Stage** field to **01-Noticing**. At this time, do not advance the opportunity beyond **Sales Stage 01-Noticing**.
- **Decision Date**: This field, located in the Opportunity header record, is the date the customer makes a decision regarding the purchase of the solution. The Decision Date defaults to 90 days from the date that you created the opportunity.
- **Revenue**: Overall opportunity revenue.
- **Probability %**: The estimated odds of winning the opportunity, for example, 0% (default), 10%, 25%, 50%, 75% or 100%. You assign these odds to the opportunity. You should always attempt to accurately reflect the probability of winning the opportunity in this field. You should continue to update the odds as the opportunity progresses. For opportunities in Sales Stage 04, the **Probability %** field *must* be completed.
  Global Partner Portal has fewer sales stages than IBM's CRM system, which means that an opportunity at **Sales Stage 04-Validated** maps to one of three sales stages in IBM's CRM system. To improve communication with IBM and reduce the likelihood of being asked for more information, use the **Probability %** field, in the Opportunity header, to determine your assessment of the customer situation. Refer to the following chart to determine the appropriate value to select for the **Probability %** field on the Opportunity header record.

If your Global Partner Portal opportunity is in:	And the customer situation is:	Enter the following percentage in the Probability % field:	Maps to the IBM's CRM Sales Stage:	It maps to the IBM Signature Selling Method (SSM) sales stage	It maps to the IBM Signature Sales Leadership (SSL) sales stage
Sales Stage 04	The customer is assessing solutions from multiple sources; some uncertainty exists.	25%	Sales Stage 04	Validated/ Qualifying	Validated
Sales Stage 04	The customer is leaning toward the IBM solution and a proposal has been submitted.	50%	Sales Stage 05	Qualified/ Gaining Agreement	Qualified
Sales Stage 04	The customer indicates a preference for an IBM solution.	75% or 100%	Sales Stage 06	Conditionally Agreed/ Winning	Conditionally Agreed

- **Detailed Revenue Data**: The **Detailed Revenue Data** field is an entry point to the revenue record that should be used when you are creating an opportunity. If there are multiple revenue records in the opportunity, only the revenue for the first line item is displayed on the Opportunity header record in the **Detailed Revenue Data** field.
- **For U.S.A. opportunities only**, if applicable, IBM will contact the Business Partner regarding ITAR compliance.