Web Requests
Maintenance & Annuity Services

ibm.com/support/operations/myrequests
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My requests - direct access: ibm.com/support/operations/myrequests

→ Type your IBM ID and password and click on the ‘Sign in’ button.
My requests tab - News feed page – shows you the last 3 activities

- Click on ‘Initiate a request’ to raise a new request
How to initiate a request

Select United States

Select the type of request and click on ‘Continue’

Note: Region & country is automatically populated based on your IBM ID. Inventory change request and ServiceElite contract change request are available in US only.
Inventory change request

**Machine relocation:**
move machines from one customer location to another

**Hardware Maintenance/Software Services Discontinuance:**
request discontinuance from a CHIS contract of hardware maintenance, software services, or both

**Other:**
any other type of inventory change request for maintenance & annuity services
Submitting an Inventory change request

### Inventory change request

Note that requests of any other nature will not be processed through this form. Further options are available through "Contact" in the footer of this page.

Asterisk (*) indicate fields required to complete this transaction.

**About you (your IBM profile information)**

- **Requestor ID**: bpuser@bpcompany.com
- **First name**: James
- **Last name**: Smith
- **Company name**: Business Partner Company
- **Email address**: bpuser@bpcompany.com
- **Phone number**: +1 424 333 4444
- **Fax number**:

**Channel**
- Please select one

**Customer type**
- Please select a customer type

**Federal customer**
- Please select one

**Enterprise number (partners this is your enterprise number)**

IBM profile information is automatically populated – to update click on ‘Update my IBM profile’

- **Channel**: Customer or Partner
- **Customer type**: IBM Direct or Partner
- **Federal customer**: Yes or No

- Fill in Enterprise number – **Partners**, this is your enterprise

Should above information be incorrect or incomplete, please use the "Update my IBM profile" button before you complete the "About your request" fields.

**Update my IBM profile**

---

Note: required fields are indicated by red asterisk. Selected fields will remain populated for future requests.
Submitting an Inventory change request (cont)

- Fill in the end user company name, if different from the company name in your profile. **Partners** – enter the end user company name
- Click the boxes for request types desired. Multiple request types can be chosen at the same time.

  ![Request Form](image)

  **About your request**

  - Client / end user company name (if different than requestor company name)
  - Request type
    - Machine(s) relocation
    - Hardware maintenance / Software services discontinuance
    - Other

  Please provide any additional comments related to this request:

  - **Note:** Please use the enter key to insert a new line while typing.

  Request template: **Template required if request has more than five machines (21KB)**

  Use the attachment capability below to provide further information and evidence.

  Attach a file (max. 5 MB)

  ![Browse](image)

  - Please use ONLY the attached template file to process my request
Inventory change request – Machine relocation

• Choose either customer number or address
• Depending on choice, complete required associated information (customer number or new address information) where equipment should be moved.

• Provide Machine/serial and date information

Note: there is a limit of five type/serials in form. Please use the ‘template’ for larger requests.
Inventory change request – discontinuance

<table>
<thead>
<tr>
<th>Hardware maintenance / Software services discontinuance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance contract number</td>
</tr>
<tr>
<td>Cancel all associated offerings?</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

**Type of service**

<table>
<thead>
<tr>
<th>Product type*</th>
<th>Serial number*</th>
<th>Services offering name*</th>
<th>Effective date (add date format yyyy/mm/dd)*</th>
<th>Reason for cancellation*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select one</td>
<td></td>
<td></td>
<td></td>
<td>Please select a reason</td>
</tr>
<tr>
<td>HWMA</td>
<td></td>
<td></td>
<td></td>
<td>Please select a reason</td>
</tr>
<tr>
<td>SW Services</td>
<td></td>
<td></td>
<td></td>
<td>Please select a reason</td>
</tr>
<tr>
<td>HWMA &amp; Services</td>
<td></td>
<td></td>
<td></td>
<td>Please select a reason</td>
</tr>
</tbody>
</table>

- Cancel all associated offerings: click ‘Yes’ to cancel any offerings Associated with the HWMA type/serial you are requesting to cancel. No need to list offerings separately unless they do not have a type/serial associated with them, such as SupportLine offerings.

Note: Form can be used to request HWMA only, SW Services only, or both
Inventory change request – templates

For inventory changes, each web request will allow you to enter up to 5 machines and/or services. If your request is larger, a template has been provided for you to complete and attach to the request:

- To access the template, click on Template required if request has more than five machines link
- The template can be downloaded each time you need it, or saved to your desktop to be completed and saved as needed

Request template

Use the attachment capability below to provide further information and evidence.

Attach a file (max. 5 MB)

Browse

Please use ONLY the attached template file to process my request
Inventory change request – discontinuance template

<table>
<thead>
<tr>
<th>CHIS#</th>
<th>Cancel associated offerings</th>
<th>Type of Service</th>
<th>Product type</th>
<th>Serial number</th>
<th>Effective date</th>
<th>Offering name</th>
<th>Reason for cancellation</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 alphanumeric characters</td>
<td>Y or N</td>
<td>HWMA or SW Services</td>
<td>4 numeric characters</td>
<td>5 digits or 7 digits</td>
<td>(ISO date format)</td>
<td>(required if offering type = SW Services)</td>
<td>(required if cancellation reason = Other)</td>
<td></td>
</tr>
</tbody>
</table>

- CHIS# = contract number the machine or services are covered by (if known)
- Cancel associated offerings = select Y if you want to cancel all offerings associated with a type serial. No need to list all of the offerings
- Type of service = choose HWMA or SW Services if cancelling a specific offering
- Product type & serial number = for HWMA & type/serial tied offerings
- Effective date
- Offering name = include only if requesting a specific offering
- Reason for cancellation = choose reason for cancel
- Comments = required if reason is other
Inventory change request – discontinuance template

Example of completed discontinuance template
- Line 1 → maintenance for type/serial 9117-ABD95 and all associated offerings will be cancelled
- Line 2 → SWMA for PowerVM for type/serial 9117-733C5 will be cancelled
- Line 3 → maintenance for type/serial 9117-1778P will be cancelled

Limited only by the number of lines Excel will allow

Template is multi-tabbed; no need to delete additional tabs not being used when submitting template

Data must start on line 8 of template

<table>
<thead>
<tr>
<th>CHIS#</th>
<th>Cancel associated offerings</th>
<th>Type of Service (choose one)</th>
<th>Product type</th>
<th>Serial number</th>
<th>Effective date</th>
<th>Offering name</th>
<th>reason for cancellation (choose one)</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>AB9GJ5</td>
<td>Y</td>
<td>HWMA</td>
<td>9117</td>
<td>ABD95</td>
<td>2012-11-08</td>
<td>SWMA FOR POWERVM</td>
<td>Replaced by new technology</td>
<td></td>
</tr>
<tr>
<td>ANKGDZ</td>
<td>N</td>
<td>SWS</td>
<td>9117</td>
<td>733C5</td>
<td>2012-12-06</td>
<td>SWMA FOR POWERVM</td>
<td>Other</td>
<td>moved SW to another machine</td>
</tr>
<tr>
<td>AB9GJ5</td>
<td>N</td>
<td>HWMA</td>
<td>9117</td>
<td>1778P</td>
<td>11/05/2012</td>
<td>SWMA FOR POWERVM</td>
<td>Returned to IBM/IGF</td>
<td></td>
</tr>
</tbody>
</table>
Inventory change request – out of productive use form

- The second tab of the spreadsheet contains the form used by our partners and sales team for out of productive (OPU) discontinuance.
- At this time, only one attachment can be submitted for each web request. If an additional file needs to be attached as backup for an OPU request, it will have to be inserted as an object into the template.
- The information you need to insert into the spreadsheet needs to be saved as a text file, word document, or other file format (instructions found in the Appendix section of presentation).
- **Note:** Customer/Enduser requests no longer required as backup for OPU discontinuance. Only the BP OPU form is required.
### Inventory change request – machine relocation

<table>
<thead>
<tr>
<th>CHIS#</th>
<th>New customer number</th>
<th>Street address (1)</th>
<th>Street address (2)</th>
<th>City, State Zipcode</th>
<th>Product type</th>
<th>Serial</th>
<th>Move date</th>
</tr>
</thead>
<tbody>
<tr>
<td>6 alphanumeric characters</td>
<td>7 digits</td>
<td></td>
<td></td>
<td></td>
<td>4 digits</td>
<td>5 digits or 7 digits</td>
<td>(ISO date)</td>
</tr>
</tbody>
</table>

- **CHIS#** = contract number machine or services are covered by (if applicable)
- **New customer number** = IBM customer number for new location
- **Street address/City, State Zip code** = address for new location if IBM customer number not known or a new customer number needs to be created
- **Product type/serial** = machine to be moved
- **Move date** = effect date of machine movement
Example of completed machine relocation template

- Line 1 → machine 8272/23C2004 moved to new address. Customer number is either not known or is a new location; machine is not on CHIS or contract is not known.
- Line 2 → machine 4399/1029651 moved to new IBM customer number. Machine is active on CHIS contract ABBCDY.

- Limited only by the number of lines Excel will allow
- Template is multi-tabbed; no need to delete additional tabs not being used when submitting template
- Data must start on line 8 of template
Inventory change request – Other - example

- If Other is selected as the request type, only comments field and file attachment field will appear in request
- Provide detailed comments for request
- Attach file if applicable
Inventory change request: submitting

- When all request types are completed, click submit.
- You will receive an online submission notification: and an e-mail.
  
  ![Image of submission notification]

  Your IBM Maintenance request submitted (reference number: CWMUS1302261946)
  IBM_My_Requests to: David Shackelford
  Default custom expiration date: 02/26/2014

  This document is automatically generated by a service machine.
  Please do not respond to this e-mail.

  Dear customer,

  Thank you for submitting a Maintenance & Amenity Services request; your request has been received.

  For reference purposes, please note your request number: CWMUS1302261946

  You can monitor the status of your request or determine the assigned IBM contact at any time by clicking the following link: https://www.ibm.com/support/operations/myrequests/ReviewRequest.ws/RequestID=CWMUS1302261946

  With kind regards,
  IBM Customer Support

  For any questions regarding your contract, order, inventory and invoices please contact us through the options available on http://www.ibm.com/customersupport

- By clicking on the links you will get the details of your request.
ServiceElite contract change requests

**Auto-renew status update:**
change auto-renew status and attach a purchase order (PO)

**Budget & Planning quote for Billing Period Changes:**
request a budget & planning (B&P) quote for an existing contract

**Contract copy:**
request a copy of an IBM Customer Agreement (ICA), Maintenance Services Agreement (MSA), or a Statement of Work (SOW) for a specific offering

**Submit Purchase order:**
submit a new purchase order, a replacement purchase order, or an amended purchase order

**None of the above:**
contract request not covered by the other options
Submitting a ServiceElite contract request

ServiceElite contract change request

Note that requests of any other nature will not be processed through this form. Further options are available through "Contact" in the footer of this page. Asterisk (*) indicate fields required to complete this transaction.

About you (your IBM profile information)

- Requestor ID*: bpuser@bpcompany.com
- First name*: James
- Last name*: Smith
- Company name*: Business Partner Company
- Email address*: bpuser@bpcompany.com
- Phone number*: +1 424 333 4444
- Fax number*

Channel: Please select one
Customer type: Please select a customer type
Federal customer: Please select one

IBM profile information is automatically populated – to update click on ‘Update my IBM profile’

- Fill in Enterprise number – Partners, this is your enterprise

Channel = Customer or BP
Customer type = IBM Direct or BP
Federal customer = Yes or No

Note: required fields are indicated by red asterisk and selected fields will remain populated for future requests.
Submitting a ServiceElite contract request (cont)

- Fill in the end user company name, if different from the company name in your profile. **Partners** – enter the end user company name
- Click the boxes for request types desired. Multiple request types can be chosen at the same time.

![About your request form](attachment:image)

- Attach a file (optional) by clicking **Browse** to upload; one file can be attached in each request.

- Scroll down to enter details of the request type.
## ServiceElite contract request:
### auto-renew - budget & planning – contract copy

<table>
<thead>
<tr>
<th>Auto-renew status update</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance contract number</td>
</tr>
<tr>
<td>Auto renew new status*</td>
</tr>
<tr>
<td>Please select one</td>
</tr>
<tr>
<td>I am attaching a Purchase</td>
</tr>
<tr>
<td>No</td>
</tr>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

- Fill in Maintenance contract number
- Select the new auto-renew status as No or Yes
- If attaching a purchase order, click the box and fill in the PO number. The purchase order would be attached as a file

<table>
<thead>
<tr>
<th>Budget and planning quote for billing period charges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance contract number*</td>
</tr>
<tr>
<td>Start date*</td>
</tr>
<tr>
<td>End date*</td>
</tr>
</tbody>
</table>

- Fill in Maintenance contract number
- Fill in the Start date and End date of the quote required by selecting the date through the calendar icon

<table>
<thead>
<tr>
<th>Contract copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer name (if different from enterprise)</td>
</tr>
<tr>
<td>IBM Customer Agreement (ICA)</td>
</tr>
<tr>
<td>Master Services Attachment (MSA)</td>
</tr>
<tr>
<td>Statement of Work (SOW)</td>
</tr>
<tr>
<td>Signed schedule</td>
</tr>
</tbody>
</table>

- If requesting for a customer other than the enterprise, fill in the customer name
- Click the boxes associated to the contract copies required along with document number
- Multiple types of contract copies can be selected
ServiceElite contract request: submit Purchase Order

<table>
<thead>
<tr>
<th>Submit Purchase Order (PO)</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Purchase Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>customer contact name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>customer contact e-mail</td>
<td></td>
<td></td>
</tr>
<tr>
<td>purchase order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>New purchase order number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Order start</td>
<td></td>
<td></td>
</tr>
<tr>
<td>date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Order end</td>
<td></td>
<td></td>
</tr>
<tr>
<td>date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase Order amount</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Fill in customer contact name, Email, and phone number
- Fill in new PO number, start and end date, and PO amount. Again, the calendar icon can be used to enter dates.
- If you are replacing or amending a PO, click the appropriate box and add the existing PO number.
- Include contract number for reference
ServiceElite contract request – None of the above

- If ‘None of the above’ is selected as the request type, only comments field and file attachment field will appear in request

- Provide detailed comments for request

- Attach file if applicable
When all request types are completed, click Submit

You will receive an online submission notification: and an e-mail.

By clicking on the links you will get the details of your request.
How to view requests

News feed page – shows you the last 3 activities

- Select the tab ‘Review my requests’ for additional options
  - View details
  - View comments
Review my requests

- last 5 requests sent for processing
- shows all requests of the last 2 years

Search options for specific requests

- Search specific requests
- Last 5 requests
- All requests
- Maintenance and annuity services requests

Any variation of these fields will pull results needed.
Viewing requests – Review my requests (cont)

Click on Request number link to bring up request detail and comment/attachment information.

<table>
<thead>
<tr>
<th>Reference #</th>
<th>Request type</th>
<th>Status</th>
<th>Country</th>
<th>Client</th>
<th>submitted</th>
<th>Opportunity identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>CWMUS1412151898</td>
<td>Inventory change request</td>
<td>Submitted</td>
<td>United States</td>
<td></td>
<td>15 Dec 2014 - 17:07 GMT</td>
<td></td>
</tr>
<tr>
<td>CWMUS1412151897</td>
<td>Inventory change request</td>
<td>Submitted</td>
<td>United States</td>
<td>other company name</td>
<td>15 Dec 2014 - 17:01 GMT</td>
<td></td>
</tr>
</tbody>
</table>

- To send an email to the assigned IBM Rep, simply click on their name in the request:

  Details
  
  Requested Action | Assigned       | Contract | Open/Closed     |
  -----------------|---------------|----------|-----------------|
  OTHER             | David Shackleford |          | 27 Feb 2013 10:38 GMT |

An email to the CSR along with the Reference (CWM) number will be created using the mail service associated with your internet browser.

Note: if you have multiple requests types, only the request you chose will appear in e-mail.
### Viewing requests (cont)

<table>
<thead>
<tr>
<th>Request - CWMUS1303041977</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request type</strong></td>
</tr>
<tr>
<td>Inventory Request</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request - CWMUS1303041977</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request type</strong></td>
</tr>
<tr>
<td>Inventory Request</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Request - CWMUS1302261948</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request type</strong></td>
</tr>
<tr>
<td>ServiceElite Request</td>
</tr>
</tbody>
</table>

---

**Available status**

- **In progress**: request has been submitted and pending assignment to a CSR
- **Assigned**: request has been assigned to a CSR and is awaiting processing
- **Closed**: request has been completed and closed by CSR
Closed requests and email confirmation

When a request is closed, the time stamp in the Open/Closed column will be updated:

<table>
<thead>
<tr>
<th>Request type</th>
<th>Request number</th>
<th>Status</th>
<th>End User Customer</th>
<th>Submitted date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServiceElite Request</td>
<td>CWMUS1302261948</td>
<td>Closed</td>
<td>Shacks Groceries</td>
<td>26 Feb 2013 15:56 GMT</td>
</tr>
</tbody>
</table>

You will also receive an email confirming that a request has been completed with a link back to that specific request.

---

Your IBM Maintenance request completed (reference number: CWMUS1302261948)

IBM_My_Requests to: David Shackleford

Default custom expiration date: 03/04/2014

This document is automatically generated by a service machine.
Please do not respond to this e-mail.

Dear customer,

Your request number CWMUS1302261948 has been completed.

Details of your request can be found by clicking the following link: [https://www.ibm.com/support/operations/myrequests/ReviewRequest.ws?RequestID=CWMUS1302261948](https://www.ibm.com/support/operations/myrequests/ReviewRequest.ws?RequestID=CWMUS1302261948)

With kind regards,

IBM Customer Support

For any questions regarding your contract, order, inventory and invoices please contact us through the options available on: [http://www.ibm.com/customersupport](http://www.ibm.com/customersupport)
How to add additional comments or files

As long as the request is not in status closed, in the detail of the request you can add further comments or upload additional files.

Use the browse option to upload additional files and click on ‘Save’
Cancel previous request

- You want to inform IBM of the decision not to process a particular request and click the Cancel button. You will then receive an email notification to cancel the request.
- New cancel request and the original request will be completed by IBM