

# How to manage opportunities in My Sales Activities

for

## Channel Value Rewards- Software Sales and Software Sales Assist (CVR-S/SA)

Topics in this document:

1. How to set up your profile in MySA
2. How to accept an opportunity from IBM in MySA
3. Create and submit an opportunity for CVR-Sales/Sales Assist eligibility
4. How to edit an opportunity
5. How to update the opportunity when it is submitted for CVR-S/SA
6. Preparing for Payment
7. How to pull a report from MySA
8. Where to look for more information
9. Changes to the previous version

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## 1. HOW TO SET UP YOUR PROFILE IN MYSA

Your migration to MySA from GPP has been successful and you are ready experience the benefits of MySA.

### **Having issues logging in for the first time?**

Please ensure that your Authorized Profile Administrator has granted you access to MySA/Sales Connect for BP in PPS.

User access to MySA is controlled by your Authorized Profile Administrator (APA) in PPS, which they sign onto via the IBM Partnerworld website here:

<https://www-304.ibm.com/partnerworld/wps/servlet/mem/ContentHandler/partnerworld-member?lnk=fif>

### **APA instructions for user access:**

- a) In the upper right hand corner, select Roles and then Administrators from the dropdown menu.
- b) On the Administrator Resources page, scroll to the section called Manage Employee Profile, then select the Update registered employees, roles, and access link.
- c) Click the Select hyperlink next to the user you wish to grant access to MySA, then scroll down to the Select Action dropdown box and choose Employee Roles.
- d) Click the large arrow to the right of that box to edit the user's roles.
- e) Scroll to the bottom of the next page and locate the Sales Connect Roles check boxes.
- f) Please select only one position:

**OM Focal:** he can register a new opportunity, automatically added to all opportunities, either the opportunity is coming from IBM or registered by anybody else in her/his BP Company, accept or reject opportunities coming from IBM on behalf of her/his BP Company, edit all opportunities owned by her/his BP Company and, add any other OM User to opportunity Sales Team.

**OM User:** he can register a new opportunity, view all opportunities owned by her/his BP Company, edit opportunities when he is on the opportunity Sales Team and, add any other OM User to opportunity Sales Team.

- g) Hit Submit after selecting the appropriate role for the user. Repeat for other MySA users at your firm.

**NB: The update to our systems can take from three hours to overnight  
Need help?**

MySA Online Help: [https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/prod/index.html](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/prod/index.html)

Contact PWCS for further assistance: <https://www-356.ibm.com/partnerworld/wps/servlet/ContentHandler/contact-partnerworld>

For instruction about how to get access see the video: [Enablement of BP Employees for using MySA](#)

## 2. HOW TO ACCEPT AN OPPORTUNITY FROM IBM IN MySA

When you receive one opportunity from IBM, you will see it in your MySA opportunities section. You can recognize it because it is not a BP1-XXXXXXX opportunity number and you will have the Owner status as 'Pending Acceptance'. Please, click on the opportunity number to open the opportunity.

My Sales Activity Overview Opportunities Incentives

### My Sales Activity

Opportunities and Incentives

**Op Opportunities** Opportunities with nearest pending decision date ↻

Opportunity Number	Opportunity Description	Client	Owner Status	Decision Date
Q6-I4DE0Z2	\$SME\$ TEST OHHASHI	\$SME\$ IBM Japan Test	Pending Accep...	Dec 10, 2018
<a href="#">BP1-4A-VN3OXW7</a>	test education	\$SME\$Dummy Austria	Accepted	Oct 16, 2017
<a href="#">BP1-2B-6MMMBE1</a>	test opportunity July 19th	\$SME\$Dummy Austria	Accepted	Oct 17, 2017

When you are in the opportunity, you can check all the information about it. On the top of the screen, you have two options 'Accept' or 'Reject'. Please, click on 'Accept' to make yourself the owner of the opportunity or click on 'Reject' to reject the opportunity from IBM.

# 4F-AV48JU8

for Robin Bass Inc

Accept this IBM created opportunity? Accept Reject Back

Accept by: 08 Oct 2017

---

Description: **Test Opportunity RKT**

BP Private

Client/Contact Data Restrictions: **Not restricted**

Sales Stage: **03-Identified/Validating**

Decision Date: **01 Jan 2018**

Opportunity Codes: **ISA-999-NoSolutionSold**

CoMarketing UCID:

Campaign Code:

Client Name: **Robin Bass Inc**

Currency: **United States Dollars**

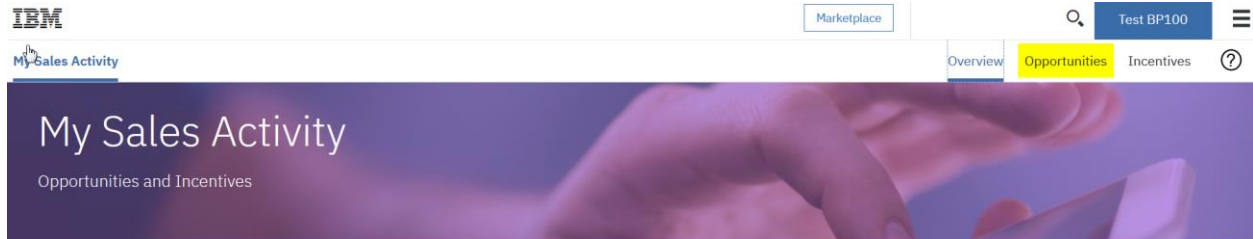
Opportunity Team:

mySA (mySA) BPTester	Team Member
Kaori (Kaori) Ohhashi	Team Member
todd (todd) sloan	Team Member
Marianna (Marianna) Di Costanzo	Team Member
Jim (Jim) Keosian	Team Member

When you click on 'Accept', the opportunity will be assigned to you.

### 3. CREATE AND SUBMIT AN OPPORTUNITY FOR CVR-SALES/SALES ASSIST ELIGIBILITY

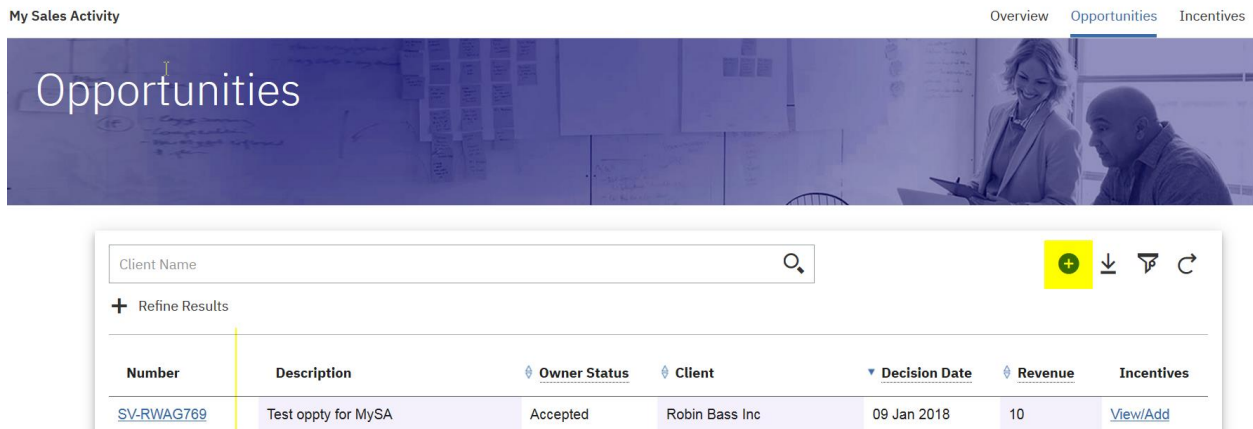
Open your MySA (<https://mysa.mybluemix.net/salesactivities/#/>) and you will be in the overview screen. Please, click on 'Opportunities' to go to the opportunity view.



Opportunities Opportunities with nearest pending decision date ↻

Opportunity Number	Opportunity Description	Client	Owner Status	Decision Date
<a href="#">GC-6TRL9PK</a>	test only	\$SMESTest China	Pending Accep...	07 Jan 2018

When you are in the opportunity view, please, click on the 'plus' (+) sign to start creating a new opportunity.



The below screen will appear and you must fill in the required fields for CVR-S/SA to create an opportunity (the red asterisk indicates that the field is mandatory to create the opportunity and you will not be able to save the opportunity unless you fill in all of them). You will have to fill in:

- Description
- Sales Stage
- Primary Contact
- Client name
- Currency
- Revenue Line Item
- Decision date



# New Opportunity

Description:\*

BP Private

Client/Contact Data Restrictions:

Sales Stage:\*

Decision Date:\*

Opportunity Codes:

CoMarketing UCID:

Campaign Code:

BP Opportunity Number:

Source:

Client Name:\*

[Advanced Search](#)

Currency:\*

Opportunity Team:

Name:	Role:
<input type="text" value="Antonio Morales"/>	<b>Identifier</b>
<input type="text" value="Antonio Morales"/>	<b>Noticer</b>

+ Add Team Member

## Revenue

Total Revenue:

## Line Items

+ Details

+ Add Line Item

## Contacts

+ Details

+ Add Contact    + Create Contact

To choose the Client, you have two options. You can use the general search and type the name and choose the one that you want from the list that appears:

Client Name: \*

Select one
^

marianna

ST.MARIANNA UNIVERSITY, SCHOOL OF MEDICINE - DB0019BE-JP

MARIANNA TEST ACCOUNT - DC2DJ6BX

MARIANNA AIRMOTIVE CORP - DC2DTXF8

Marianna Test Account - DC2H3427

Or you can use the Advanced Search. Click on Advanced Search and a new window will pop up.

Client Name: \*

Select one
v

Advanced Search

You will have two options for searching: Business Name and CRM number. Then you choose the country and type a part or the whole name of the client. A list will appear and you can choose the most suitable for your opportunity. You can create a new client as well by clicking on 'Create new'.

Search and select client

Business Name ^

Business Name

CMR number

Select country v

+ Create new

Search

Search and select client

Business Name v

marianna

Select country v

+ Create new

Search

Business Name	Street address	City	State/Province	CMR number
MPAMPE MARIANNA	Ksenofanous 20	Ano Liosia		P00518
MARIANNA INDUSTRIES, INC.	11222 I St	Omaha	Nebraska	0731606
Marianna Airmotive Corporation	15 E Quintette Rd	Cantonment	Florida	P119144
Marianna Test Account	Via Roma, 1	Milano	Milano	P09989
CITY OF MARIANNA	2898 Green St	Marianna	Florida	5526915

Then, if you scroll down, you will have the part of the line item (revenue line of the opportunity). Here, it is important to choose the right Brand Family. Click on Add Line Item to start.

**Revenue**

Total Revenue:

**Line Items**

+ Details

+ Add Line Item

The CVR-S/SA Eligible Part number list

([http://sc4.ihost.com/gpp/permanent/svi\\_eligible\\_part\\_numbers.pdf](http://sc4.ihost.com/gpp/permanent/svi_eligible_part_numbers.pdf)) will show you which Brand Family to choose according to the product that you want to sell. For example, if we want the Part number D09ZNLL, we can see that the Brand Family is Cognos Analytics. So, we start typing 'Cognos' in the Advanced Keyword section and it appears:

Part Number	Part Description Long	Type (Level 10)	Brand Family (Level 20)	Product Group/GPP Brand Certification Record	Authorization Required
D09ZNLL	COGNOS POWERPLAY CLIENT USER AUTH USER TUFR TIER 1 TRDUP LIC+SW S&S 12MO	Analytics	Cognos Analytics	Advanced Analytics	Yes

## Create new line item

Advanced Keyword Search:

- Level 20: Cognos-BI SW Services (BEE00)
- Level 20: Cognos Insight (BNJ00)
- Level 20: Cognos Analytics (BNS00)
- Level 20: Software: Cognos Disclosure Management on Cloud (BQJ00)
- Level 20: Cognos Analytics on Cloud (BRS00)

Product Information (L-30):

Select one

When you select the Brand Family, all the fields will be updated automatically. You can search as well using the Level 10 and Level 20 fields.

When you choose the correct brand family, just click on 'Next'.

## Create new line item

Brand Code (L-20): \*

Cognos Analytics ✕ ▾

Product Information (L-30):

Select one ▾

Machine Type (L-40):

Select one ▾

Cancel Clear All Next

Then, you will have to fill in the Amount, quantity and bill date and click on 'Create Revenue Line Item' to finally create the revenue line.

## Create new line item

Owner: **Test BP100**

Amount: \*

Quantity:

Bill Date:

10 Jan 2018 📅

Cancel Prev Create Revenue Line Item



You can see that the Revenue line has been created. You can edit it by clicking on 'Edit' button.

## Revenue

Total Revenue: (USD)

### Line Items (1)

Details

1 (L-10) Analytics

Edit

(L-20) Cognos Analytics

Line Item Owner: Test BP100

Duration (months): 1

Total Contract Value: 2 (2 USD)

Close Date: 10 Jan 2018

Quantity: 1

Bill Date: 10 Jan 2018

Then, we need to add the Contact. Scroll down and you will find the following section. You have two options: add contact or create contact.

## Contacts

Details

+ Add Contact + Create Contact

If you click on 'Add Contact', a search field will appear and you have to type the name of the contact and a list will appear so you can choose the most suitable one. Choose it and click on 'Add'.

Con

Marianna Test

Tommy Belsito

Select one

Add

Details

## Contacts

Details

+ Add Contact + Create Contact

Marianna Test

Add

If you click on 'Create Contact', a new window will appear and you have to fill all the mandatory fields (Name, Surname, Job Title, Phone number, email address and Country).

### Create new contact

First name: \*

Last name: \*

Job Title: \*

Fax:

Phone: \*

Email: \*

Mobile Phone:

Once you have filled in everything, scroll down and click on 'Save'. Once you have done this, you will see the contacts that you have added and finally you will be able to create the opportunity by clicking on 'Save' in the bottom of the screen.

Contacts (2) + Details

**Marianna Test**

Phone: 123456789  
Email: abc@abc.com  
Job Title:

**Leo Messi**

Phone: 1234567890  
Email: BARSAGmail.com  
Job Title: HR

Make Primary -

+ Add Contact + Create Contact

Save Back

When you click on 'Save', a window will pop up asking for the privacy of the opportunity.

**Confirm all data visible to IBM**

visible to all IBM users if you select "Confirm".

If you do not wish for the opportunity to be visible to all IBM users until it is closed, select "Cancel", then select the "BP Private" check box near the top left side of the page and Save the opportunity. Alternatively, you can make the base opportunity information visible to all IBM users, but restrict disclosure of the Client, Contact and Opportunity Description information by selecting one of the options in the "Client/contact data restrictions" field.

Note: You should select "Confirm" now if this opportunity is part of a Co-Marketing campaign, opportunity registration, or other program/initiative that requires being visible to IBM users in the IBM SalesConnect System. Not doing so may affect your participation or delay payment in those programs.

Confirm Cancel

**Only at this point** you can go back and make the opportunity as BP private opportunity, If you confirm, the opportunity will be created and it will flow to Sales Connect, once the opportunity is saved as NOT Private is not possible to change idea.

To mark the opportunity as BP private, click on CANCEL, go to the main screen and click on the box BP Private.

In alternative if you want just to restrict some information, you can select the appropriate choice from the Client/Contact Data Restrictions field.

BP Private

Client/Contact Data Restrictions:

Not restricted ^

Not restricted

Visible to opportunity and client team only

Visible to opportunity team only

After choosing the most suitable option for you, you can 'Save' at the bottom of the site and 'Confirm' and the opportunity will be created.

My Sales Activity Overview Opportunities Incentives ?

## BP1-HS-6E4151H

for Marianna Test Account

[↻](#) [☰](#)

Description: <b>Test opportunity for guidelines</b>	Client Name: <b>Marianna Test Account</b>
<input type="checkbox"/> BP Private	Currency: <b>€ (EUR)</b>
Client/Contact Data Restrictions: <b>Not restricted</b>	Opportunity Team:
Sales Stage: <b>04-Validated/Qualifying</b>	<b>mySA (mySA) BPtester</b> <span style="float: right;">Team Member</span>
Decision Date: <b>10 Jan 2018</b>	<b>Kaori (Kaori) Ohhashi</b> <span style="float: right;">Team Member</span>
Opportunity Codes:	<b>todd (todd) sloan</b> <span style="float: right;">Team Member</span>
CoMarketing UCID:	<b>Marianna (Marianna) Di Costanzo</b> <span style="float: right;">Team Member</span>
Campaign Code:	<b>Jim (Jim) Keosian</b> <span style="float: right;">Team Member</span>
	<a href="#">View more (22)</a>   <a href="#">Show less</a>

### Revenue

Total Revenue: **2 EUR (2 USD)**

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### Line Items (1)

[+ Details](#)

[+ Add Line Item](#)

---

### Incentives

[+ View/Add Incentives](#)

---

### Notes

[+ Details](#)

[+ Create Note](#)

---

### Contacts (2)

[+ Details](#)

[+ Add Contact](#) [+ Create Contact](#)

---

### Additional Information

[+ Details](#)

[Edit](#) [Back](#)

You will see your new opportunity on the top of the list of your opportunities.

My Sales Activity Overview Opportunities Incentives ?

## Opportunities

Client Name  + ↓ 🔍 ↺

+ Refine Results

Number	Description	Owner Status	Client	Decision Date	Revenue	Incentives
<a href="#">BP1-HS-6E4151H</a>	Test opportunity for guidelines	Accepted	Marianna Test Account	10 Jan 2018	2 EUR	<a href="#">View/Add</a>

However, your opportunity is still not submitted for CVR-S/SA. We have just created the opportunity and now you can submit it for the incentive program. There are two ways to get to the window where you can submit your opportunity for the incentive programs. First, if you go to the Opportunities view in MySA, you will find your opportunity and you will see 'View/Add' in the same line:

My Sales Activity Overview Opportunities Incentives

## Opportunities

Client Name  + ↓ 🔍 ↺

+ Refine Results

Number	Description	Owner Status	Client	Decision Date	Revenue	Incentives
<a href="#">BP1-HS-6E4151H</a>	Test opportunity for guidelines	Accepted	Marianna Test Account	10 Jan 2018	2 EUR	<a href="#">View/Add</a>

The second option is to click on the opportunity number. Open the opportunity in MySA and scroll down until the Incentive section. There you will find as well 'View/Add':

**Incentives**

[+ View/Add Incentives](#)

Either way, when you click on 'View/Add', it will take you to the following screen where you can choose Channel Value Rewards (CVR) – Sales/Assist

## Incentives View/Add

Op
BP1-HS-6E4151H

**Client:** Marianna Test Account

**Description:** Test opportunity for guidelines

**Applied Incentives**

Incentive Name	Status	Submitted Date

**Revenue:** 2 EUR ( 2 USD )

**Available Incentives**

Incentive Name ↑

Channel Value Rewards (CVR) - Sales/Assist	<input type="button" value="Add"/>
Entitled SW Top Contributor Initiative for MLC	<input type="button" value="Add"/>
Entitled SW Top Contributor Initiative for OTC	<input type="button" value="Add"/>
ESW TCI for MLC - Payment Request Federal 3	<input type="button" value="Add"/>
GTS/IS - Prime Contracting Program	<input type="button" value="Add"/>
GTS/IS - Remarketed Program	<input type="button" value="Add"/>
GTS/IS Closed Contract Fee Program	<input type="button" value="Add"/>

When you click on Add, you will see the data of your opportunity. You will not be able to submit the opportunity until all the data is filled in and correct. Checklist:

- Sales Stage: 04/Validated/Qualifying
- BF CVR-S/SA Participation and BF Certified: Y and Y
- BANT document fulfilled and attached
- Primary Client Contact (name, job title, address, email address, phone number)

Unless all the requirements are met, you will not be able to press the button Submit for Eligibility as shown below.

My Sales Activity

Channel Value Rewards (CVR) - Sales/Assist  
for BP1-DM-A05GC9E

Incentive Status: Opportunity Description: **\$SMES\$ TESTOPTY for BPs and guide creation**

Client: **\$SMES\$PEDU**

Government owned: Total Opportunity Revenue: **100 EUR (100 USD)**

Primary Client Contact: Opportunity Create Date: **18 Apr 2017 9:50:04 AM GMT**

Submit for Eligibility Date: Sales Stage: **03-Identified/Validating**

Expiration Date: Decision Date: **17 Jul 2017**

Submit for Payment Date:

CVR Comments: [View/Add attachments](#)

**Incentive Solutions** [CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	100 EUR (100 USD)				Y	N	

[Submit for Eligibility](#) [Back](#)

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To attach the BANT document, click on View/Add attachments on the CVR- S/SA opportunity page and you will see the following screen:

Attachments

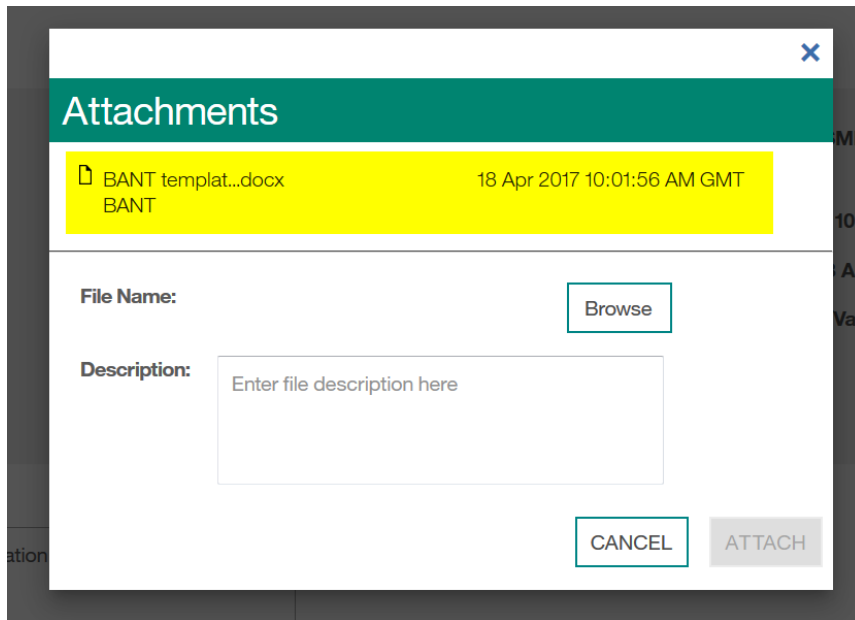
No attachments

File Name:

Description:

Browse and attach your document. You will see that it is attached when it appears in the upper part of the window

Click Cancel or X to exit from this screen.



*(Note: Ensure that you have the BANT form prepared and saved with the correct file name. When an attachment is uploaded, it cannot be viewed or edited through MySA. If you need to update it, you can do so on your local machine and then reattach it, but it must have a new, unique filename.)*

As you can see, when the opportunity meets all the requirements, the button Submit for Eligibility becomes green and you can click on it to submit your opportunity for CVR-S/SA.

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
Cognos Analytics	15 EUR (15 USD)				Y	Y	
API Economy	100 EUR (100 USD)				Y	N	

When the opportunity is submitted, you can see the 'Selected' word in place of Add:

The screenshot shows a web interface titled "Incentives View/Add". At the top, there is a green header bar with the title. Below the header, the opportunity ID "Op BP1-DM-A05GC9E" is displayed. The client information is "Client: Marianna Test Account" and the revenue is "Revenue: 100 EUR (100 USD)". The description is "Description: \$SME\$ TESTOPTY for BPs and guide creation".

Below the description, there is a section for "Applied Incentives" with a table header: "Incentive Name", "Status", and "Submitted Date".

The main section is "Available Incentives" with a sub-header "Incentive Name". It lists several incentives, each with an "Add" button. The "Channel Value Rewards (CVR) - Sales/Assist" incentive has a yellow background and the word "Selected" instead of an "Add" button.

Incentive Name	Status	Submitted Date
Bid Certification Request		
Channel Value Rewards (CVR) - Sales/Assist	Selected	
ESW TCI for MLC - Payment Request Federal 3		
GTS/IS - Prime Contracting Program		
GTS/IS - Remarketed Program		
GTS/IS Closed Contract Fee Program		
GTS/IS Softlayer Registration		
IBM Managed Security Services Deal Registration		



#### 4. HOW TO EDIT AN OPPORTUNITY

Open your MySA (<https://mysa.mybluemix.net/salesactivities/#/opportunities>) and click on the opportunity that you want to edit.

My Sales Activity Overview Opportunities Incentives

## Opportunities

+ ↓ ↗ ↻

+ Refine Results

Number	Description	Owner Status	Client	Decision Date	Revenue	Incentives
<a href="#">BP1-XC-UZBDX28</a>	\$SME\$ TEST OPTY OHHASHI	Accepted	資生堂K.K.	Aug 15, 2018	1,000,021 JPY	<a href="#">View/Add</a>
<a href="#">BP1-HS-6E4151H</a>	Test opportunity for guidelines	Accepted	Marianna Test Account	Jan 10, 2018	3 EUR	<a href="#">View/Add</a>

You can edit the Line Items, Notes and Contacts without clicking on the 'Edit' button. However, if you want to edit the header of the opportunity, please, click on the 'Edit' button on the bottom right corner.

My Sales Activity Overview Opportunities Incentives ?

## BP1-HS-6E4151H

for Marianna Test Account

↻ ☰

Description: **Test opportunity for guidelines**

BP Private

Client/Contact Data Restrictions: **Visible to opportunity team only**

Sales Stage: **04-Validated/Qualifying**

Decision Date: **Jan 10, 2018**

Opportunity Codes:

CoMarketing UCID:

Campaign Code:

Client Name: **Marianna Test Account**

Currency: **€ (EUR)**

Opportunity Team:

<b>Marianna (Marianna) Di Costanzo</b>	Team Member
<b>Antonio (Antonio) Jesus Morales Morales</b>	Team Member, Identifier, Noticer
<b>Silvio Diego (SILVIO DIEGO) Picollo</b>	Line Item Owner
<b>Test BP100</b>	Line Item Owner

**Revenue**

Total Revenue: **3 EUR (3 USD)**

**Line Items (2)** + Details

+ Add Line Item

**Incentives**

+ View/Add Incentives

**Notes** + Details

+ Create Note

**Contacts (2)** + Details

+ Add Contact + Create Contact

**Additional Information** + Details

Edit Back

↑  
↓  
↶  
↷

Contact Privacy Terms of use Accessibility Cookie preferences

All the fields which may be updated will be unlocked and you will be able to change them. You can update everything except the 'BP Private' box. Please, to see how the changes are done, refer to the previous section. When you are done with the changes, please click on the 'Save' on the bottom right corner of the screen and the changes will be saved.

My Sales Activity Overview Opportunities Incentives ?

# BP1-HS-6E4151H

for Marianna Test Account

**Description:**\*

BP Private

**Client/Contact Data Restrictions:**

**Sales Stage:**\*

**Decision Date:**\*

**Opportunity Codes:**

**CoMarketing UCID:**

**Campaign Code:**

**BP Opportunity Number:**

**Client Name:**\*

[Advanced Search](#)

**Currency:**\*

**Opportunity Team:**

Name:	Role:
<b>Antonio (Antonio) Jesus Morales Morales</b>	<b>Identifier</b>
<b>Antonio (Antonio) Jesus Morales Morales</b>	<b>Noticer</b>
Marianna (Marianna) Di Costanzo	Team Member
Antonio (Antonio) Jesus Morales ...	Team Member
Silvio Diego (SILVIO DIEGO) Piccolo	Line Item Owner
Test BP100	Line Item Owner

[+ Add Team Member](#)

**Line Items (2)** + Details

[+ Add Line Item](#)

**Incentives**

[+ View/Add Incentives](#)

**Notes** + Details

[+ Create Note](#)

**Contacts (2)** + Details

[+ Add Contact](#) [+ Create Contact](#)

**Additional Information** + Details

[Contact](#) [Privacy](#) [Terms of use](#) [Accessibility](#) [Cookie preferences](#)

## 5. HOW TO UPDATE THE OPPORTUNITY WHEN IT IS SUBMITTED FOR CVR-S/SA

In order to update your opportunity once it is submitted for CVR-S/SA, you have to find your opportunity in MySA (either Opportunities or Incentives view) and click on the opportunity number.

My Sales Activity Overview Opportunities Incentives

🔍

[+ Refine Results](#)

Incentive Name	Status	Submitted Date	Client	Opportunity Description	Opportunity
<a href="#">Channel Value Rewards (CVR)-Sales/Assist</a>	Duplicate Opportunity Search	Oct 24, 2017	(null)TestCorpforTraining	\$Test \$\$	BP1-YE-4V1K

Click on 'Edit' in the bottom of the screen.

My Sales Activity Overview Opportunities Incentives ?

Description: **\$Test \$\$**

BP Private

Client/Contact Data Restrictions: **Not restricted**

Sales Stage: **04-Validated/Qualifying**

Decision Date: **Jan 31, 2018**

Opportunity Codes: **ISA-999-NoSolutionSold**

CoMarketing UCID:

Campaign Code:

Client Name: **(null)TestCorpforTraining**

Currency: **USD (USD)**

Opportunity Team:

<b>Kaori (Kaori) Ohhashi</b>	Team Member
<b>mySA (mySA) BPtester</b>	Team Member
<b>Josephine (Josephine) Libid</b>	Team Member
<b>Rohit (Rohit) Saxena</b>	Team Member
<b>Istvanone (Istvanone) Csonka</b>	Team Member

[View more \(16\)](#) | [Show less](#)

### Revenue

Total Revenue: **200 USD**

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#### Line Items (1) + Details

[+ Add Line Item](#)

---

### Incentives

[+ View/Add Incentives](#)

---

### Notes + Details

[+ Create Note](#)

---

### Contacts (1) + Details

[+ Add Contact](#) [+ Create Contact](#)

---

### Additional Information + Details

Edit

Back

In this guide, we are going to update the revenue amount but you can change different fields in the opportunity. So, we scroll down and click on Details and then Edit.

### Line Items (1)

— Details

1 (L-10) Analytics

 Edit

(L-20) Cognos Analytics

(L-30) Do Not Use - GPP CGBI

Line Item Owner: **Test BP200**

Duration (months): **1**

Total Contract Value: **200 USD**

Close Date: **Jan 31, 2018**

Quantity: **1**

Bill Date: **Jan 31, 2018**

 Add Line Item

The following window will pop up. You scroll down and click Next.

### Edit line item

Brand Code (L-20): \*

 x v

Product Information (L-30):

 x v

Machine Type (L-40):

 v

Then you change the Amount from 200 to 201 and we click Save.

### Edit line item


Owner: **Test BP200**

Amount: \*

 USD

Quantity:


Bill Date:

And we can see the changes in the main screen.

**Line Items (1)** — Details

---

**1** (L-10) Analytics  Edit


(L-20) Cognos Analytics

(L-30) Do Not Use - GPP CGBI

Line Item Owner: Test BP200 Duration (months): 1

**Total Contract Value: 201 USD** Close Date: Jan 31, 2018

Quantity: 1 Bill Date: Jan 31, 2018


 Add Line Item

We can change the currency of the opportunity in the upper part. Click on the drop down menu to open it.

Description:\*

BP Private

Client Name: (null)TestCorpforTraining [Advanced Search](#)

Currency:\*  

Opportunity Team:

And then, type or choose the currency that you want.

Description:\*

BP Private

Client Name: (null)TestCorpforTraining

€ (EUR)

USD (USD) 

Opportunity Team:

And like this, you can change as well Description, Sales Stage, Team Members...once you have done all the changes, please scroll down and click on Save in the main screen to save all the changes that you have done.



Description: \*  
\$Test \$\$

BP Private

Client/Contact Data Restrictions:  
Not restricted

Sales Stage: \*  
04-Validated/Qualifying

Decision Date: \*  
Jan 31, 2018

Opportunity Codes:  
x ISA-999-NoSolutionSold

CoMarketing UCID:  
Select one

Campaign Code:  
Select one

BP Opportunity Number:

Client Name:  
(null)TestCorpforTraining [Advanced Search](#)  
Currency: \*  
€ (EUR)

Opportunity Team:

Name:	Role:
Frank (Frank) Green	Identifier
Frank (Frank) Green	Noticer
Test BP200	Line Item Owner
Kaori (Kaori) Ohhashi	Team Member
mySA (mySA) BPtester	Team Member
Shaswata (Shaswata) Sarkar	Team Member
Nicholas (Nicholas) Piechl	Team Member
Antonio (Antonio) Jesus Morales ...	Team Member

+ Add Team Member

### Line Items (1)

Details

- 1 (L-10) Analytics
- (L-20) Cognos Analytics
- (L-30) Do Not Use - GPP CGBI

Edit

Line Item Owner: Test BP200  
Total Contract Value: 201 USD  
Quantity: 1

Duration (months): 1  
Close Date: Jan 31, 2018  
Bill Date: Jan 31, 2018

+ Add Line Item

### Incentives

+ View/Add Incentives

### Notes

+ Details

+ Create Note

### Contacts (1)

+ Details

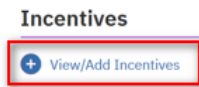
+ Add Contact + Create Contact

### Additional Information

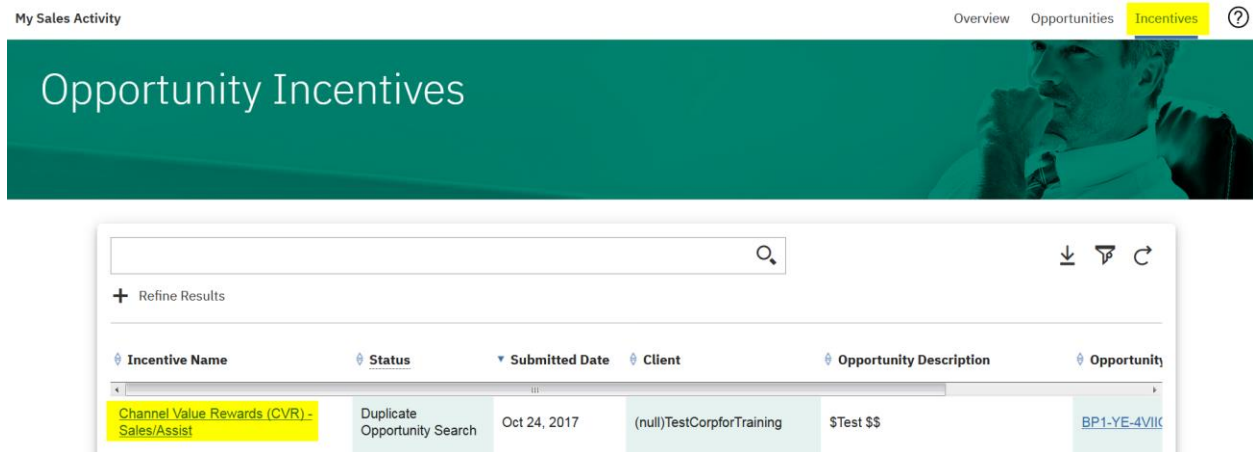
+ Details

Save Back

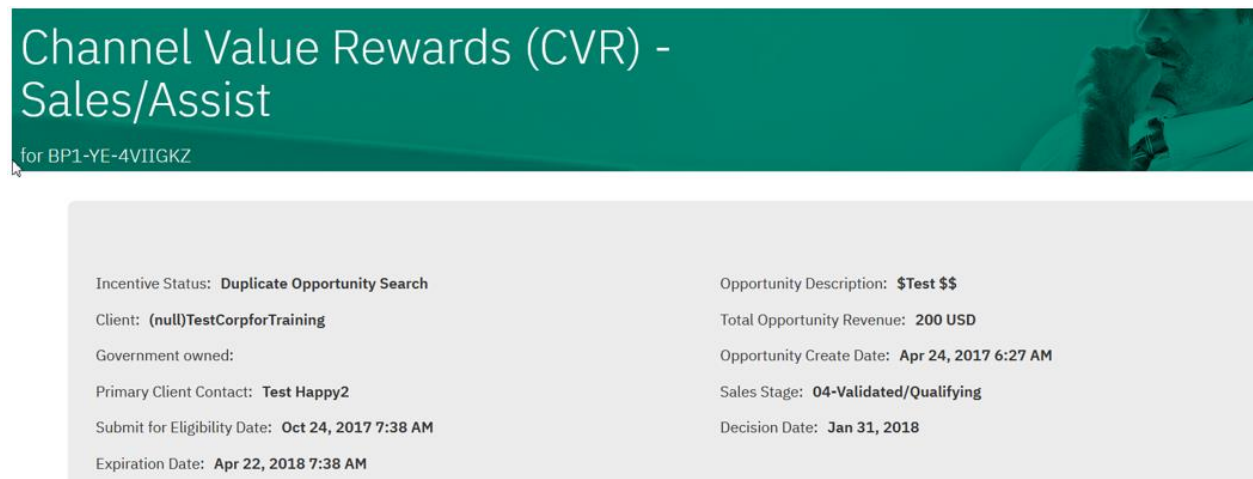
Once saved you can update your incentive by clicking on “View/Add Incentives” in the Incentive section:



You can reach the same page also from the Incentive Screen view:



Clicking on the Incentives Name will open the opportunity form. We can see all the information there. Please note that the opportunity information in this screen doesn't show your last update but corresponds to last information sent to the CVR- S/SA team.



To 'refresh' the information and send them to the CVR-S/SA team, you must scroll down and click on Edit. Once you click on Edit, the information will be updated in this form.

## Incentive Solutions

[CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
Cognos Analytics	200 USD		Draft		Y	Y	

[Edit](#) [Back](#)

And finally, to send the changes to GPP (still used by the CVR-S/SA Team) , you have to click on Update CVR-Sales/Sales Assist button. Once you have clicked on that, the changes will be visible in GPP as well.

## Incentive Solutions

[CVR Eligible Parts Number List](#)

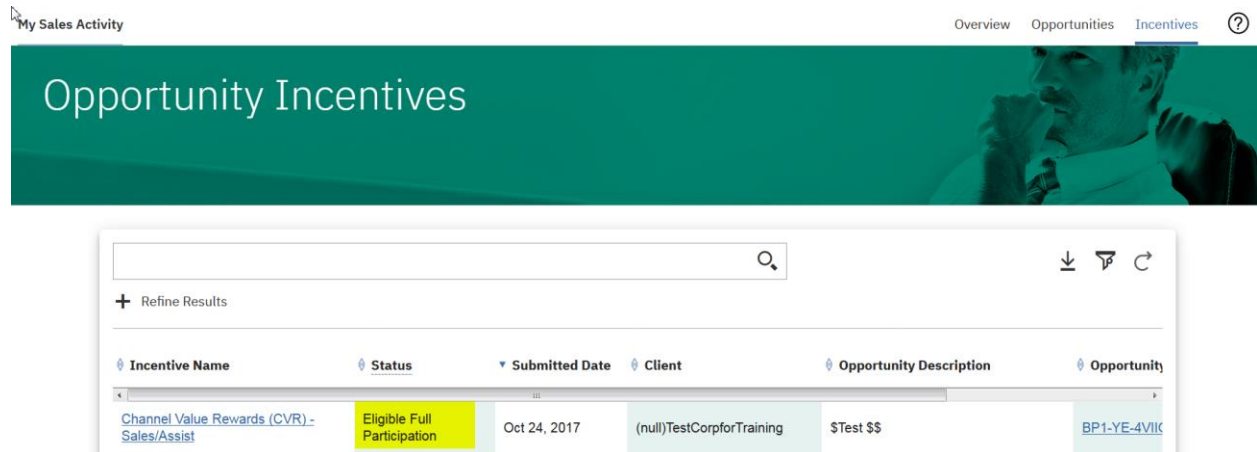
Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
Cognos Analytics	201 EUR (201 USD)				Y	Y	

[Submit for CVR-Sales Assist Payment](#) [Update CVR-Sales/Sales Assist](#) [Back](#)



## 6. PREPARING FOR PAYMENT

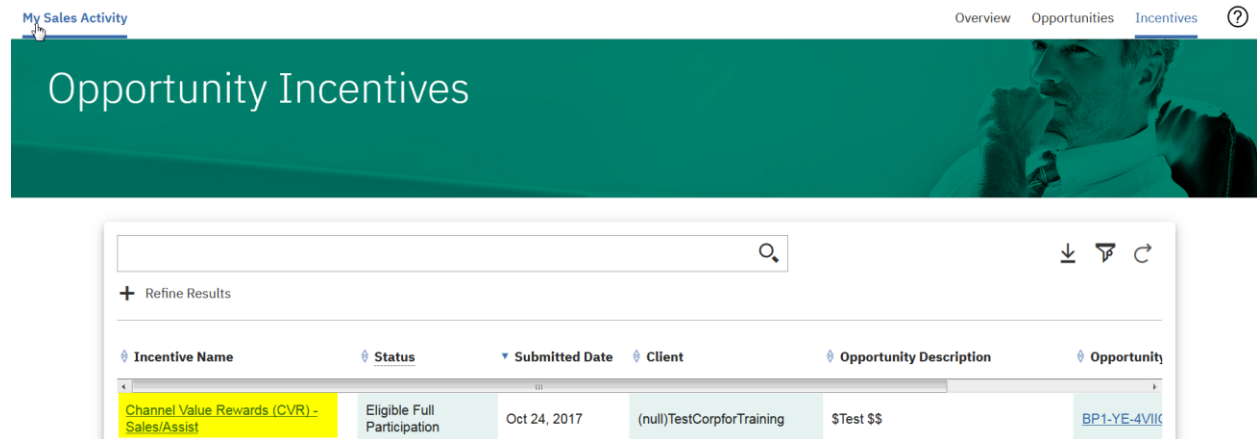
When the opportunity is approved for CVR-S/SA, you will see that the status moves to Eligible Full/Partial Participation. You can check the status of the opportunity either in the Opportunities View or the Incentives View of MySA.



The screenshot shows the 'My Sales Activity' interface with the 'Incentives' tab selected. The page title is 'Opportunity Incentives'. Below the header is a search bar and a 'Refine Results' button. A table displays the following data:

Incentive Name	Status	Submitted Date	Client	Opportunity Description	Opportunity
<a href="#">Channel Value Rewards (CVR) - Sales/Assist</a>	Eligible Full Participation	Oct 24, 2017	(null)TestCorpforTraining	\$Test \$\$	<a href="#">BP1-YE-4VIIK</a>

If you want to check the details of the opportunity, please go to the Incentives View and click on the Incentive Name.



This screenshot is identical to the one above, but the 'Incentive Name' column in the table is highlighted in yellow, indicating it is the selected item for further action.

It will open the form of the opportunity and you can check here all the details such as Status, Government status, Submit date for Eligibility, Sales Stage...

# Channel Value Rewards (CVR) - Sales/Assist

for BP1-YE-4VIIGKZ

↻

<p>Incentive Status: <b>Eligible Full Participation</b></p> <p>Client: <b>(null)TestCorpforTraining</b></p> <p>Government owned:</p> <p>Primary Client Contact: <b>Test Happy2</b></p> <p>Submit for Eligibility Date: <b>Oct 24, 2017 7:38 AM</b></p> <p>Expiration Date: <b>Apr 22, 2018 7:38 AM</b></p> <p>Submit for Payment Date:</p>	<p>Opportunity Description: <b>\$Test \$\$</b></p> <p>Total Opportunity Revenue: <b>201 EUR</b></p> <p>Opportunity Create Date: <b>Apr 24, 2017 6:27 AM</b></p> <p>Sales Stage: <b>04-Validated/Qualifying</b></p> <p>Decision Date: <b>Jan 31, 2018</b></p>
--	--

Sales Order Number:

ISU Code Description:

CVR Comments:

Passport Adv Agreement Number:

Passport Adv Site Number:

Description for CVR:

Revenue for CVR:

Fulfilling BP

IBM Invoice Date:

[View/Add attachments](#)

+ Opportunity Incentive Client Information

## Incentive Solutions

[CVR Eligible Parts Number List](#)


Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
Cognos Analytics	201 EUR	Registered - Eligible	Net New Opportunity	N	Y	Y	

Edit Back

When you are ready to close the deal and submit the opportunity for payment, you need to follow the following instructions. Please, open the opportunity in MySA and click Edit to update the necessary fields of the opportunity.

# BP1-YE-4VIIGKZ

for \$\$TestCorpforTraining



[↻](#) [☰](#)

Description: **\$\$Test \$\$**

BP Private

Client/Contact Data Restrictions: **Not restricted**

Sales Stage: **04-Validated/Qualifying**

Decision Date: **Jan 31, 2018**

Opportunity Codes: **ISA-999-NoSolutionSold**

CoMarketing UCID:

Campaign Code:

Client Name: **\$\$TestCorpforTraining**

Currency: **€ (EUR)**

Opportunity Team:

<b>Kaori (Kaori) Ohhashi</b>	<b>Team Member</b>
<b>mySA (mySA) BPtester</b>	<b>Team Member</b>
<b>Shaswata (Shaswata) Sarkar</b>	<b>Team Member</b>
<b>Nicholas (Nicholas) Piechl</b>	<b>Team Member</b>
<b>Antonio (Antonio) Jesus Morales Morales</b>	<b>Team Member</b>

[View more \(2\)](#) | [Show less](#)

### Revenue

Total Revenue: **201 EUR (201 USD)**

#### Line Items (1)

[+ Details](#)

[+ Add Line Item](#)

#### Incentives

[+ View/Add Incentives](#)

#### Notes

[+ Details](#)

[+ Create Note](#)

#### Contacts (1)

[+ Details](#)

[+ Add Contact](#)   [+ Create Contact](#)

#### Additional Information

[+ Details](#)

[Edit](#) [Back](#)

The opportunity must be changed to Sales Stage 07 and the decision date updated (in case it is not the correct one).

The screenshot shows a form for editing an opportunity. On the left, there is a 'Description' field containing '\$Test \$\$', a 'BP Private' checkbox, a 'Client/Contact Data Restrictions' dropdown set to 'Not restricted', a 'Sales Stage' dropdown set to '07-Won/Implementing', and a 'Decision Date' field. On the right, there is a 'Client Name' field with '\$TestCorpforTraining', a 'Currency' dropdown set to '€ (EUR)', and an 'Opportunity Team' section with three members: 'Frank (Frank) Green' as 'Identifier', 'Frank (Frank) Green' as 'Noticer', and 'Test BP200' as 'Line Item Owner'. The 'Line Item Owner' dropdown is currently set to 'Team Member'.

The revenue amount must be updated according to the deal size as well so the payment can be done properly (Please, refer to the section number 5, page 19). Please, click on Save after all the changes are done.

This section shows the 'Contacts (1)' and 'Additional Information' tabs. Under 'Contacts (1)', there are buttons for '+ Add Contact' and '+ Create Contact', and a '+ Details' link. Under 'Additional Information', there is a '+ Details' link. At the bottom right, there are 'Save' and 'Back' buttons.

When all the changes are done, you can go back the Incentive by clicking on “View/Add Incentives” in the opportunity Incentive section:

The screenshot shows the 'Incentives' section with a red box highlighting the '+ View/Add Incentives' button.

The opportunity information is not updated yet

The screenshot shows a summary of the opportunity information. On the left, it lists: Incentive Status: **Waiting Order Validation**, Client: **(null)TestCorpforTraining**, Government owned: , Primary Client Contact: **Test Happy2**, Submit for Eligibility Date: **Oct 24, 2017 7:38 AM**, Expiration Date: **Apr 22, 2018 7:38 AM**, and Submit for Payment Date: **Oct 24, 2017 9:23 AM**. On the right, it lists: Opportunity Description: **\$Test \$\$**, Total Opportunity Revenue: **201 EUR**, Opportunity Create Date: **Apr 24, 2017 6:27 AM**, Sales Stage: **07-Won/Implementing**, and Decision Date: **Oct 25, 2017**.

Please click on the EDIT button at the bottom of the screen update your CVR

(Note: The Total Opportunity Revenue and the opportunity sales stage will be updated when you click on Edit).

for BP1-DM-A05GC9E

<p>Incentive Status: <b>Eligible Full Participation</b></p> <p>Client: <b>\$SMESBPEDU</b></p> <p>Government owned: <b>No</b></p> <p>Primary Client Contact: <b>Test Happy2</b></p> <p>Submit for Eligibility Date: <b>26 Apr 2017 11:39:02 AM GMT</b></p> <p>Expiration Date: <b>23 Oct 2017 11:39:03 AM GMT</b></p> <p>Submit for Payment Date:</p>	<p>Opportunity Description: <b>\$SMES TESTOPTY for BPs and guide creation</b></p> <p>Total Opportunity Revenue: <b>100 EUR</b></p> <p>Opportunity Create Date: <b>18 Apr 2017 10:01:54 AM GMT</b></p> <p><b>Sales Stage: 07-Won/Implementing</b></p> <p>Decision Date: <b>17 Jul 2017</b></p>
--	---

Sales Order Number:

ISU Code Description:

CVR Comments:

Passport Adv Agreement Number:

Passport Adv Site Number:

Description for CVR:

Revenue for CVR:

Fulfilling BP

IBM Invoice Date:

[View/Add attachments](#)

+ Opportunity Incentive Client Information

## Incentive Solutions

[CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	100 EUR		Ineligible	N	Y	Y	
Cognos Analytics	0 EUR	Registered - Eligible	Net New Opportunity	N	Y	Y	

**Edit**

Back

[Contact](#) [Privacy](#) [Terms of use](#) [Accessibility](#)

Please, click on the button Update CVR-Sales/Sales Assist to update the systems.

Incentive Status: **Eligible Full Participation**

Client: **\$SME\$BPEDU**

Government owned: **No**

Primary Client Contact: **Test Happy2**

Submit for Eligibility Date: **26 Apr 2017 11:39:02 AM GMT**

Expiration Date: **23 Oct 2017 11:39:03 AM GMT**

Submit for Payment Date:

Opportunity Description: **\$SME\$ TESTOPTY for BPs and guide creation**

**Total Opportunity Revenue: 112 EUR (112 USD)**

Opportunity Create Date: **18 Apr 2017 10:01:54 AM GMT**

Sales Stage: **07-Won/Implementing**

Decision Date: **17 Jul 2017**

Sales Order Number:

ISU Code Description:

CVR Comments:

Passport Adv Agreement Number:

Passport Adv Site Number:

Description for CVR:

Revenue for CVR:

Fulfilling BP

IBM Invoice Date:

[View/Add attachments](#)

+ Opportunity Incentive Client Information

## Incentive Solutions

[CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	100 EUR		Ineligible	N	Y	Y	
Cognos Analytics	0 EUR	Registered - Eligible	Net New Opportunity	N	Y	Y	

[Submit for CVR-Sales Assist Payment](#)

[Update CVR-Sales/Sales Assist](#)

[Back](#)

[Privacy](#) [Terms of use](#) [Accessibility](#)

*(Note: The Revenue for CVR will be updated when you click on Update CVR-Sales/Sales Assist, which will also send the changes to GPP.)*

## Incentive Solutions

[CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	0 EUR		Ineligible	N	Y	Y	
Cognos Analytics	112 EUR	Registered - Eligible	Net New Opportunity	N	Y	Y	

Please, make the necessary changes and then click on Submit for CVR-Sales Assist Payment.

Sales Order Number:

ISU Code Description:

CVR Comments:

Passport Adv Agreement Number:

Passport Adv Site Number:

Description for CVR:

Revenue for CVR:

Fulfilling BP

IBM Invoice Date:

[View/Add attachments](#)

+ Opportunity Incentive Client Information

## Incentive Solutions

[CVR Eligible Parts Number List](#)

Brand Family	Revenue for CVR	Incentive Fee Type	BF CVR Status	Dup Oppty	BF CVR Partic	BF Certified	Payment Process Status
API Economy	100 EUR		Ineligible	N	Y	Y	
Cognos Analytics	0 EUR	Registered - Eligible	Net New Opportunity	N	Y	Y	

[Submit for CVR-Sales Assist Payment](#)

[Update CVR-Sales/Sales Assist](#)

[Back](#)

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To make sure that the opportunity is submitted for payment, please go to Incentives View in MySA and the opportunity should be in Status: Waiting Order Validation

My Sales Activity

[Overview](#) [Opportunities](#) [Incentives](#)

**Opportunity Incentives**

Incentive Name	Status	Submitted Date ↓	Opportunity Number	Client	Opportunity Description
<a href="#">Channel Value Rewards (CVR) - Sales...</a>	Waiting Order...	26 Apr 2017	<a href="#">BP1-DM-A05GC9E</a>	\$SMESBPEDU	\$SMES TESTOPTY for BPs ...

**Sales documents for CVR-SA for NGE and for CVR-S for GE customers:**

For CVR Sales for GE customers, IBM has a 100% policy sampling, so you have to attach the Sales documents within 30 days after the Sales Order date. For CVR Sales Assist for NGE customers, you might be required by IBM to attach the sales documents if your opportunity is selected for sampling.

To attach the sales documents, open the incentive form and click on View/Add attachments on the CVR-S/SA opportunity page:

The screenshot shows a form with several input fields and a button. On the left side, there are fields for 'Sales Order Number', 'ISU Code Description', 'CVR Comments' (containing 'test opportunity'), 'Passport Adv Agreement Number', and 'Passport Adv Site Number'. On the right side, there are fields for 'Description for CVR' (containing 'SSME\$ TESTOPTY for BPs and guide creation'), 'Revenue for CVR' (containing '100 EUR'), a checkbox for 'Fulfilling BP', and 'IBM Invoice Date' (containing '26 Apr 2017'). A yellow button labeled 'View/Add attachments' is located at the bottom right of the form.

You will see the next screen:

The screenshot shows a dialog box titled 'Attachments' with a close button (X) in the top right corner. It displays a list of attachments with columns for file name, icon, and date. The first entry is 'SomeTextFile.txt' with a file icon and the date '9 Aug 2017 6:09:10 AM GMT'. Below the list, there is a 'File Name:' field with a 'Browse' button, a 'Description:' field with the placeholder text 'Enter file description here', and two buttons at the bottom: 'CANCEL' and 'ATTACH'.

Browse and attach your document. You will see that it is attached when it appears in the upper part of the window



Click Cancel or X to exit from this screen.

Attachments

BANT templat...docx 18 Apr 2017 10:01:56 AM GMT

BANT

File Name: Browse

Description: Enter file description here

CANCEL ATTACH

*(Note: Ensure that you have the Sales Documents prepared and saved with the correct file name. When an attachment is uploaded, it cannot be viewed or edited through MySA. If you need to update it, you can do so on your local machine and then reattach it, but it must have a new, unique filename.)*

Sales documentation presented to IBM by the Business Partner must, in total, provide proof points which clearly show Business Partners' involvement in the sales cycle and their actions that convinced the end-user customer to acquire the Eligible Products, and must satisfy the following criteria to qualify as Eligible Sales Documentation:

1. Show that the Business Partner authored the documentation and clearly demonstrates the Business Partner recommended the Eligible Products or Brand Families and assisted the end-user in the decision to purchase. (To demonstrate the Business Partner authored the documentation, it must have a Business Partner company logo, Business Partner company name, or other identification on the documentation.) For a GE transaction, the documentation should provide clear line of sight evidence of value add sales and/or technical engagement beyond license fulfillment by the Business Partner.
2. Include a reference to the Eligible Products or Brand Families and quantity or configuration of the products the Business Partner has recommended to the end-user customer
3. All documentation must be dated before the IBM Sales Order date for the Eligible Products, and must address the specific customer situation. In the case of a tender, all documentation must be dated prior to the announcement of the tender.
4. If requested, the documentation must include evidence that it was submitted to the end user.
5. If price quotes sent by the Business Partner to the end-user are provided, they must be dated on or after the document(s) used as evidence for criteria number 1. Price quotes can only be used to satisfy criteria number 2.

#### **For GE End Users Only**

6. Evidence of two-way communication between the End User and the Business Partner.

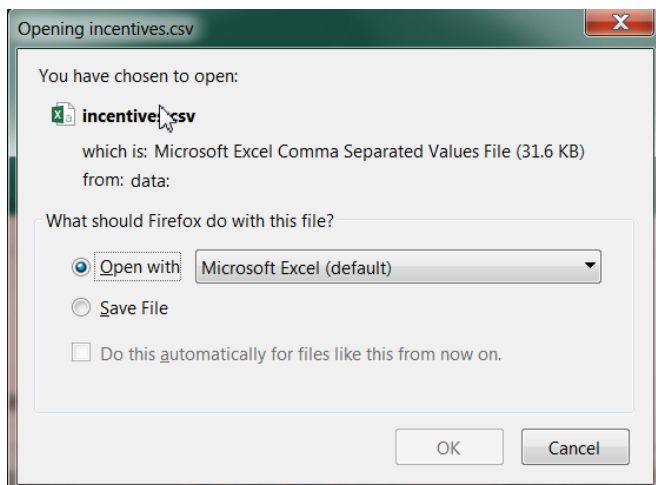
## 7. HOW TO PULL A REPORT FROM MySA

If you want to pull a report with the opportunities submitted for incentives, you have to go to the incentive tab of MySA and then click on the icon with an arrow down.



Incentive Name	Status	Submitted Date	Client	Opportunity Description	Opport
<a href="#">GTS/S - Remarketed Program</a>	Submitted For Eligibility	Sep 12, 2017	Test	\$\$Test\$\$	<a href="#">BP1-XM-</a>
<a href="#">GTS/S - Prime Contracting Program</a>	Submitted For Eligibility	Aug 29, 2017	Robin Bass Inc	\$\$test of auto accept - do OM focals ...	<a href="#">MX-3OJL</a>
<a href="#">IBM Expedited Rewards for Security</a>					

Once you click on that icon, the following screen will pop up. Click on 'Open' and you will have the report of all your opportunities submitted for incentives.



	A	B	C	D	E	
	INCENTIVE NAME	STATUS	SUBMITTED DATE	OPPORTUNITY NUMBER	CLIENT	OPPORTUNITY DESCRIPTION
1	Channel Value Rewards (CVR) - Sales/Assist	Eligible Full Participation	8/9/2017	BP1-Q5-QEFD4PU	BHP BILLITON GROUP OPERATIONS PTY LTD	Test Opportunity for KR Demo
2	Channel Value Rewards (CVR) - Sales/Assist	Eligible Full Participation	8/2/2017	BP1-8E-6DAV9D9	Yale New Haven Health System	Techdata Demo
3	Channel Value Rewards (CVR) - Sales/Assist	Eligible Full Participation	8/2/2017	BP1-IY-EGQ76R9	Robin Bass Inc	TechData Demo with CVR Incentive
4	Channel Value Rewards (CVR) - Sales/Assist	Eligible Full Participation	8/1/2017	HY-3116ZVF	\$SME\$Dummy Austria	Marianna test education August 1st
5	SVP Solution	Submitted For Eligibility	7/31/2017	BP1-JK-TJA2643	\$SME\$Dummy Austria	Test opportunity education June 8th

## 8. WHERE TO LOOK FOR MORE INFORMATION

- **Webpage for Channel Value Reward Sales/Sales Assist**  
<http://www.ibm.com/partnerworld/CVRSoftwareSalesAndSalesAssist>
  - **Getting Started with MySA**  
<https://www.ibm.com/partnerworld/page/my-sales-activity-get-started>
  - **MySA Overview video**  
[https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/mysa/demo/mysa.mp4](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/mysa/demo/mysa.mp4)
  - **My Sales Activity page in PartnerWorld and Online help**  
<https://www-356.ibm.com/partnerworld/wps/servlet/ContentHandler/my-sales-activity-overview>
  - **MySA Quick Reference Card**  
[https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/prod/mysa/mysa\\_overview/mysa\\_quick\\_reference\\_card\\_qrc.html](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/prod/mysa/mysa_overview/mysa_quick_reference_card_qrc.html)
  - **Comparison of MySA with Global Partner Portal**  
[https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/prod/mysa/opportunity\\_management/additional\\_resources/my\\_sales\\_activity\\_comparison\\_with\\_global\\_partner\\_portal.html](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/prod/mysa/opportunity_management/additional_resources/my_sales_activity_comparison_with_global_partner_portal.html)
  - **Frequently Asked Questions**  
[https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/prod/mysa/opportunity\\_management/additional\\_resources/faq.html](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/prod/mysa/opportunity_management/additional_resources/faq.html)
  - **MySA Online Help**  
[https://www-154.ibm.com/sales/salesconnect/olh/en\\_us/olh/prod/index.html](https://www-154.ibm.com/sales/salesconnect/olh/en_us/olh/prod/index.html)
- Supported Browser: Mozilla Firefox 38 Extended Support Release (ESR)
- **PWCS**  
<https://www-356.ibm.com/partnerworld/wps/servlet/ContentHandler/contact-partnerworld>
  - **Technical Support:** [GPPOPS@uk.ibm.com](mailto:GPPOPS@uk.ibm.com)

## 9. CHANGES TO THE PREVIOUS VERSION

Date	Updates
2017 10 31	<p>Section 'How to accept an opportunity from IBM': description changed according to the new MySA version (p. 3)</p> <p>Change of the link of MySA (p.4)</p> <p>Section 'Create and submit an opportunity for CVR Sales/Sales Assist eligibility': description changed according to the new MySA version (p. 4)</p> <p>Section 'How to edit an opportunity': description changed according to the new MySA version (p. 17)</p> <p>Section 'How to update the opportunity when it is submitted for CVR S/SA': description changed according to the new MySA version (p. 19)</p> <p>Added a shortcut to open the incentive from the opportunity page (p. 23)</p> <p>Changed the sentence and the picture related to the "refresh" button. Refresh doesn't update the oppty info. You must click on EDIT to update it (p. 23)</p> <p>Section 'Preparing for payment': description changed according to the new MySA version (p. 25)</p> <p>Added again the shortcut to open the incentive directly from the opportunity page and removed the sentence related to the "refresh button" (p.28)</p> <p>Section 'Hints and tips': deleted</p>
2017 08 10	<p>Section 'How to accept one opportunity from IBM in MySA' added. (p. 3).</p> <p>Section name changed from 'How to submit for payment for CVR-S/SA' to 'Preparing for Payment' (p. 23)</p> <p>How to attach the sales documents added to the section 'Preparing for Payment' (p. 31)</p> <p>Section 'How to pull a report from MySA' added. (p.36)</p>
2017 06 08	<p>Section 'How to update one opportunity when it is submitted for CVR-S/SA' added. (p.18)</p>
2017 05 09	<p>Initial document Published</p>