CUSTOMER OPERATIONS GUIDE

Information for 7Summits clients in North America

Effective February 1, 2022

Prepared by

7Summits
an IBM Company

What is this about?

In January 2021, IBM acquired 7Summits, LLC ("7Summits"). On **February 1, 2022,** 7Summits will be migrating to IBM systems and processes for all contracting, billings and payments.

As a customer of IBM, you will continue to have access to 7Summits' Salesforce implementation services and Accelerators, now under the IBM brand, as well as the extensive portfolio of IBM Consulting solutions and services offerings.

The information in this guide describes operational changes that may require action, as well as resources available to enable a smooth migration to IBM's billing and payment processes. Our goal is to make this transition as smooth and seamless as possible. Upon review of this information, if you have any questions, please contact your 7Summits Client Partner or Account Executive.

We thank you for your commitment to us and look forward to our continued partnership.

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What's changing?

Beginning with the billing cycle for services performed in February 2022, you will receive an IBM invoice generated from IBM billing systems. These invoices will look different than the previous invoices generated by 7Summits. This guide will provide you with detailed information about the billing and invoicing changes to expect.

What's not changing?

Your existing 7Summits contract and payment terms will continue until the work covered by your active contract is completed.

Getting Started

IBM offers the "My IBM" portal to make it easier for customers to manage their account information, payment methods, support requests and more in one convenient and secure location. To access My IBM, along with the other online tools referenced in this document, you first must create an IBM account (often referred to as your IBMid).

Step 1: Create an IBM account with a unique IBMid

Registering for an IBM account provides you with access to the My IBM portal and other IBM.com applications, along with enhanced features such as trials, demos, and starter kits.

Create your IBM account here: https://www.ibm.com/account. **The email address used to register for your IBM account will become your IBMid**.

If you are a current IBM customer with an IBM account, you may continue to use your existing account and do not need to create a new one. If you require assistance with recovering a lost IBMid or password, please contact the IBMid worldwide help desk as referenced below.

Note: There may be a delay of up to 15 minutes before you will be able to use your new IBMid to access IBM applications

Step 2: Complete your profile

Once you have created your IBM account and logged into My IBM using your IBMid, complete your profile by adding your contact information and preferences.

Need assistance?

For additional information, please consult the IBMid worldwide help desk.

Tax Requirements

Applicable local, state, and/or country-specific taxes will be applied to your IBM invoice (unless you have a valid tax exemption certificate on file with IBM). Additional information can be found below.

Tax ID	7Summit's tax identification numbers will change. **The US W-9 Taxpayer Identification Number and Certification for International Business Machines Corporation (IBM) Corporation (USA) can be found in the Appendix to this document.**
Taxation of services	IBM classifies taxation of services based on where the service benefit is to be derived. The product or service classification, combined with the location, will determine the tax that appears on your invoices. The above could cause a difference in the tax calculated on your IBM issued invoices beginning in February. If the service purchased is delivered cross border (e.g., you are a Canadian client but billed from the US), IBM will not tax the service. You will need to pay taxes locally in your own country.
Tax exemption certificates	To maintain sales and use tax or local V.A.T exempt status on your account, a valid exemption certificate with IBM listed as the supplier must be provided to your Accounts Receivable Representative or Customer Support Representative by submitting an online request. The exemption certificate should be based on your service address.
Need help?	For assistance with all invoice and payment related issues, including tax exemption certificates or clarification on the tax applied, please visit IBM's Orders & Invoices Customer Support website. The address for the Customer Support website will also appear on your invoices from IBM

Changes to Billing & Invoicing

On February 1, 2022, 7Summits' billing, invoicing, accounts receivable and quoting/order processes will begin migrating to IBM processes. Please update your vendor master records and POs as necessary to reflect the new vendor name and remit-to address. Details on these and other process changes can be found below.

Important changes in accounts payable and purchasing:

Purchase orders

If your IBM invoice cannot be paid without a new purchase order (PO) issued to IBM, please take the necessary actions now to issue a new one. Once complete, please provide a copy of the new PO to your account representative, email to eorder@us.ibm.com (US and Canada only). Clients with future billing requirements for active contracts may be contacted by IBM to submit a new PO.

Customer numbers

Effective February 1, 2022, 7Summits clients will have an assigned IBM Customer Number. Your Customer Number will be included on your first invoice or quote from IBM and will be referenced on all order-related communications. You will need to reference your Customer Number when communicating with IBM regarding your specific account.

Note: Your Customer Number is different from your IBMid, which is selected by you during the registration process and used to access IBM applications (see "Getting Started").

Invoice delivery and timing

Invoices from IBM for 7Summits professional services engagements and statements of work (SOW) will be physically mailed to the "Bill To" contact on file for your account. In most cases, frequency of these invoices will remain the same as it was under 7Summits.

If you would like to receive your invoices electronically, you will need to register for the Invoices@IBM portal described in the following "Access your invoices online" section.

Access your invoices online

“Invoices@IBM” is a portal that allows you to view your IBM invoices online, along with many additional features. You can view, print, route and download invoice information to a spreadsheet. If you view your invoice and have a question, there is an option to create an online inquiry so you can get help quickly without having to pick up the phone and call. At login, you can specify customer number, invoice number, or date range to bring up a list of all invoices associated with your account and available to view. Whenever a new invoice is issued for your account, you will be sent an email notification so you can login and access immediately.

“Invoices@IBM” can be found here: https://www.ibm.com/support/customer/invoices/welcome.

Note: If you are a first-time user, you will need to log in using your IBMid and follow the simple sign-up registration process. Once you are registered, you will need your Customer Number (see “Customer numbers”) in order to associate your invoices with your account.

Vendor name and remit-to information for invoice payments

The vendor name and remit-to information for invoice payments will change with your first IBM-issued invoice. Bank account information and directions for remitting payment will be included on your invoices from IBM.

Detailed information on payment methods accepted by IBM can also be found in the Orders & Invoices Customer Support FAQs. If you require additional assistance, please contact the Customer Support team.

Note: For invoices issued by 7Summits, an IBM Company, please continue to use the former remit-to address, payable to 7Summits, as it appears on those invoices to ensure correct application of payment.

Standard payment terms

While IBM standard payment terms of “due upon receipt” will automatically appear on your IBM-issued invoices, IBM will continue to honor the payment terms established in your active 7Summits contract(s) for the duration of the existing contract.

If you are contacted by an IBM Accounts Receivable representative for late payment, please make them aware that you are a heritage 7Summits customer with unique payment terms defined in your contract with 7Summits.

Invoice or payment questions

For IBM-issued invoice or payment questions, please visit our Orders & Invoices Customer Support website which offers access to self-service online tools, answers to frequently asked questions, and options for contacting the IBM Orders & Invoices Customer Support team online or by telephone.

New Contracting Process

Effective February 1, 2022, IBM will assume any ongoing 7Summits services engagements and statements of work, which may include configuration, implementation, provisioning and consulting, and will perform as originally contracted. While 7Summits professional services will become part of IBM's extensive catalogue of services offerings after February 1, 2022, the staff currently responsible for delivering ongoing projects for your company are intended to remain the same.

New professional services orders and extensions or changes to existing SOWs will be contracted using standard IBM agreements, rate structure and statements of work. IBM offerings are governed by agreements which can be found here: https://www.ibm.com/support/customer/csol/terms.

Privacy Policy

As part of the acquisition, personal information may be transferred from 7Summits to IBM. IBM's privacy policy may be viewed online at https://www.ibm.com/privacy.

IBM Data Processing Addendum (DPA) and Exhibits at http://ibm.com/dpa (DPA) shall apply to personal data processed under your contract, if and to the extent that: i) The General European Regulation about Data Protection (EU/2016/679) (GDPR); or ii) other data protection laws at http://ibm.com/dpa/dpl are applicable

Appendix

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

▶ Go to *www.irs.gov/FormW9* for instructions and the latest information.

Give Form to the requester. Do not send to the IRS.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
International Business Machines Corporation

2 Business name/disregarded entity name, if different from above
IBM Corporation

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC ☑ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ ______

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) 5

Exemption from FATCA reporting code (if any) ______

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
1 North Castle Drive, c/o IBM Income Tax Department

Requester's name and address (optional)

6 City, state, and ZIP code
Armonk, NY, 10504

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number
☐☐☐ – ☐☐ – ☐☐☐☐

or

Employer identification number
1 3 – 0 8 7 1 9 8 5

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶ George M Willett Date ▶ 1/5/2022

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to *www.irs.gov/FormW9.*

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, *later.*

Cat. No. 10231X Form **W-9** (Rev. 10-2018)