Client Guide
to
Operational Changes

Information and resources for BoxBoat clients in North America

Effective August 1st, 2022

What is this about ?

In July 2021, IBM acquired BoxBoat Technologies, LLC ("BoxBoat"). Beginning on **August 1st, 2022,** BoxBoat's business processes and systems will be migrating to IBM for back-office activities such as contracting, billings and payments.

This guide contains information on the resulting functional changes to expect after August 1st – some which may require your action -- along with the many IBM resources available to make this transition as smooth and seamless as possible for our clients.

If, upon review of this information, you have additional questions or require assistance please contact your BoxBoat Account Executive or email info@boxboat.com. Thank you for your business. We look forward to our continued relationship as we continue our transition and integration activities together.

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What's changing ?

Beginning with the billing cycle for services performed in August 2022, you will receive an IBM invoice generated from IBM billing systems. These invoices will look different than the previous invoices generated by BoxBoat, with the vendor and remit-to information for BoxBoat being replaced with IBM's. Detailed information about these and other changes to expect can be found throughout this guide.

What's not changing ?

Your existing BoxBoat contract and payment terms will continue to apply until the work covered by your active contract is completed, although the contract will be assumed and managed by IBM.

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 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	BoxBoat'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.**
Tax exemption certificates	To maintain tax 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 this website will also appear on your invoices from IBM

Changes to Billing & Invoicing

On August 1, 2022, BoxBoat's 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.

Purchase orders

If your IBM-issued invoice for BoxBoat professional services engagements and statements of work (SOW) 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 sales representative or email to eorder@us.ibm.com. Clients with future billing requirements for active contracts may be contacted by IBM to submit a new PO.

Customer numbers

Effective August 1, 2022, BoxBoat 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

Existing IBM customers will receive IBM invoices for BoxBoat professional services engagements and SOWs in the same manner as they receive their invoices from IBM (email, vendor portal, etc.).

Customers who are new to IBM will receive their first IBM invoice for BoxBoat services engagements and SOWs via U.S. mail. The invoice will include your Customer Number which can be used to register for electronic invoice delivery through Invoices@IBM (see following section "Access your invoices online"). Customers with additional delivery requirements may contact the IBM Customer Support team for assistance.

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 BoxBoat, an IBM Company, please continue to use the former remit-to address, payable to BoxBoat, 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 BoxBoat 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 BoxBoat customer with unique payment terms defined in your contract with BoxBoat.

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 Customer Support team online or by telephone. The Invoices web based self-serve tool provides clients with the option to pay invoices via ACH or credit card (US only, within limits of $99,999.99).

Onboarding IBM as your supplier

IBM has established certain operating guidelines for services performed for our customers. The following links contain information pertinent to onboarding IBM into your supplier systems:

1. IBM's main portal with information on Data Security, Privacy, Compliance, and Business Conduct Guidelines: https://www.ibm.com/trust?lnk=fab
2. IBM's commitment to Environment, Social and Governance: https://www.ibm.com/impact
3. IBM's commitment to Diversity and Inclusion: https://www.ibm.com/impact/be-equal/

Ongoing Services Engagements and SOW’s

Effective August 1st, 2022, IBM will assume any ongoing BoxBoat services engagements and SOWs, and will perform as originally contracted or as otherwise agreed. While BoxBoat’s services and solutions will become part of IBM’s catalogue of services offerings, the staff currently responsible for delivering ongoing projects for your company are intended to remain the same.

New Contracting Process

Beginning August 1st, all new purchases of BoxBoat professional services will be contracted using standard IBM agreements, rate structure and SOWs. IBM offerings are governed by agreements which can be found here: https://www.ibm.com/support/customer/csol/terms.

All proposals and quotes issued by BoxBoat will expire July 31st, 2022. Expired BoxBoat proposals and quotes will be re-issued by IBM under standard IBM Terms & Conditions.

Privacy Policy

At IBM we value your privacy and are committed to protecting and processing your personal information responsibly. The IBM privacy statement describes how IBM collects, uses and shares your information, including personal information such as business contact information or account information processed by IBM in administering the contractual relationship with you. IBM's privacy policy may be viewed online at https://www.ibm.com/privacy.

For any questions about your data processing agreement or the privacy policy, please contact your IBM representative or see the contact information within IBM's privacy policy for any questions about how IBM collects, uses, or shares your information

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.*