Partner Relationship Management Administration Guide

March 2025

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *https://docs.oracle.com/*.

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1 What's New in This Release

What's New in Siebel Partner Relationship Management Administration Guide, Siebel CRM 25.3 Update

The following table lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Themes	New topic. This chapter introduces you to a fresh, modern, and restyled user interface that is consistent with the desktop application.

What's New in Siebel Partner Relationship Management Administration Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What's New in Siebel Partner Relationship Management Administration Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 About Siebel PRM

About Siebel PRM

This chapter is a general overview of the capabilities of Oracle's Siebel PRM. It summarizes the functionality of the Siebel PRM Manager and the Siebel PRM Portal, and it discusses supported platforms. It includes the following topics:

- *What Is Siebel PRM?*
- *Siebel PRM Portal*
- *Siebel PRM Manager*
- *Supported Browsers*
- *Siebel PRM Mobile Web Client*

What Is Siebel PRM?

Siebel PRM automates and streamlines the relationship between brand owner companies and their channel and alliance partners, distributors, resellers, agents, brokers, or dealers.

Prospective partners can use Siebel PRM to view information about the brand owner company's partnership program, and to apply to be partners. The brand owner's partner manager must approve the prospective partner's application, convert the prospective partner into a partner, and give login access to the partner company. The brand owner can add partner employees or can assign this task to a delegated administrator at the partner company.

Then, the brand owner can treat the partner's employees as members of its extended sales and service team. Using Siebel PRM, you can share opportunities, service requests, accounts, solutions, and other business information with partners in the same way as you do with your own employees. You can either assign this information manually or use Siebel Assignment Manager to assign it automatically. Siebel PRM also lets you share master data, such as products and solutions, with partner companies.

In addition to letting you share business information, Siebel PRM lets you send information about special promotions and Web messages to your partners. It also lets you work collaboratively with your partners to develop plans to meet strategic goals. It helps you and your partners analyze partnership effectiveness, forecast revenue, manage market development funds, and analyze partner performance in many ways.

Siebel PRM is made up of four applications:

- **The Siebel PRM Portal.** This is a portal that partner companies use to share business information with the brand owner and to do some administrative tasks.
- **The Siebel PRM Manager.** This is the Siebel Business Application that the brand owner company uses to share business information with partners and to manage partners.
- **Siebel Partner Manager Analytics.** These tools allow the brand owner to analyze and manage its partners' performance and its channel go-to-market programs.
- **Siebel PRM Portal Analytics.** These tools allow partners to analyze and manage their performance.

The brand owner company can share business information with partners using Siebel Business Applications such as Siebel Sales, Siebel Service, or Siebel Call Center, as well as by using the Siebel PRM Manager. These products are integrated with Siebel PRM, though the other products do not provide the full functionality of the Siebel PRM Manager.

Siebel PRM Portal

The Siebel PRM Portal lets partners communicate, collaborate, and conduct business with the brand owner. It supports joint planning and execution between partners and the brand owner by giving partners access to market development funds management, opportunity and account management, Commerce selling tools, service request management, and many other tools for doing business transactions with the brand owner and customers. The Siebel PRM Portal also provides the partner with information such as literature and news.

Note: The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

Siebel PRM Portal Login Page

The Siebel PRM Portal home and login page is accessible to anyone who enters the URL in a Web browser.

This home and login page has several functions. It allows:

- Public users to learn more about your company and partnership programs.
- Individuals to register as partners and view the information available to individual partners.
- Companies to apply to become partners.
- Employees of partner companies to log in, so they can use the full functionality of the Siebel PRM Portal Web site.

Note: You need to use the partnerportal_<lang> URL to launch Partner Portal.

Siebel PRM Portal Screens

After employees of partner companies log in, they can view the Siebel PRM Portal. Its screens generally have many views as screens typically do in your own Siebel Business Application.

Note: As an overview, this list includes all the screens of the Siebel PRM Portal. When an employee logs in, he or she sees only the screens and views that are appropriate to that employee's responsibilities.

Siebel PRM Portal includes the following screens:

- **Home.** This screen greets the partner employee by name and provides links to the employee's current work. The partner employee can click any of these items to view more information about it.
- **Opportunities.** This screen displays sales opportunities that you assigned to the partner. The partner can also enter new opportunities here, which you can view using the Siebel PRM Manager.

- **Accounts.** This screen displays customer accounts that you assigned to the partner. The partner can also enter new companies here, which you can view using the Siebel PRM Manager.
- **Service Requests.** This screen displays customer service requests that you assigned to the partner. The partner can also enter new service requests here, which you can view using the Siebel PRM Manager.
- **Contacts.** This screen displays customer contacts that you assigned to the partner. The partner can also enter new contacts here, which you can view using the Siebel PRM Manager.
- **Activities.** This screen displays activities that the partner does to complete sales or fulfill service requests. You can assign activities to partners, or partners can schedule and enter activities themselves. You can view them using the Siebel PRM Manager.
- **Customer Quotes.** The partner can use this screen to generate, review, and modify customer quotes, which you can view using the Siebel PRM Manager.
- **Customer Orders.** The partner can use this screen to enter, review, and modify customer orders, or you can use it to assign customer orders to the partner for fulfillment.
- **Product Catalog.** This screen displays a catalog of your products that you have made available to the partner.
- **Infocenter.** This screen displays sales literature, other documents, and other master data that you have made available to partner organizations. The partner can download these documents or view this master data.
- **Solutions.** This screen displays solutions to common service requests.
- **Funds.** This screen displays market development funds in which this partner company is a participant, with a checkbook that lists the amount spent and balance available in each fund.
- **Fund Requests.** This screen displays requests made against market development funds in which this partner company is a participant. The partner can enter new requests for funding or you can enter requests on the partner's behalf using the Siebel Business Application. Partners can also view the status of requests during the approval process.
- **Assets.** This screen displays assets. Field service businesses use it to track assets that field engineers must service.
- **Inventory.** This screen displays inventory. Field service businesses use it to track parts that field engineers use for service.
- **Calendar.** This screen allows partners to manage their daily, weekly, and monthly activities.
- **Administration.** This screen allows the partner's delegated administrator to enter positions, to add and remove users, and to associate users with responsibilities.
- **Partner Programs.**This screen allows brand owners to set up, approve or reject, and administer partner programs. Prospective partners can apply for these partner programs on the Siebel PRM Portal.
- **Partner Locator.** This screen allows partners and customers to find the correct partner to meet their needs. For example, they can find the partners who are located closest to them, or the partners who provide the products or services they want.
- **Logout.** This screen disconnects the partner from your database. The partner can use this feature for security reasons so no one else can use the data after the partner leaves the computer.
- **Profile.** This screen displays the partner employee's user and company profile.
- **Help.** This screen displays a help page that includes instructions about using Siebel PRM through the Web.

Siebel PRM Manager

The Siebel PRM Manager gives the brand owner company a single application to manage partner interactions through the entire partner life cycle from recruitment, registration, profiling, certification, joint planning, and execution through measurement and analysis of partner performance.

Siebel PRM Manager lets the brand owner manage channel and alliance partners as extended virtual sales, marketing, and service teams. It gives the brand owner full visibility into the entire partner community, and provides support for multiple partnering models, such as resellers, multitiered global distributors, service providers, alliance partners, and many others.

Siebel PRM Manager addresses the needs of everyone who works with partners. For example, vice presidents of Channels can use it to analyze partner sales forecasts or partner performance. Channel marketing managers can use it to execute marketing programs. Channel operations managers can use it to collaborate with partners in customer sales and service.

Screens Shared by the Siebel PRM Manager and Other Siebel Business Applications

When the partner managers at your company use Siebel PRM, they see the Siebel Partner Manager Web site. The actual screens and views that your employees see depend on their responsibilities.

The Siebel PRM Manager includes virtually all the screens that you use in Siebel Sales, Siebel Service, Siebel Call Center, or Siebel Field Service to share information with your employees and to administer the Siebel system. You use these screens in the Siebel PRM Manager in the same way you use them in other Siebel Business Applications.

For example, you assign a customer contact to a partner by using the Siebel PRM Manager's Contacts screen in the same way that you assign a contact to an employee by using the Siebel Sales, Siebel Service, or Siebel Call Center Contacts screen.

You can also share information with partners using other Siebel Business Applications. For example, you can assign a contact to a partner by using the Siebel Sales, Siebel Service, or Siebel Call Center Contacts screen. You enter partners in your Siebel database as employees, and you work with them the same way you work with your own employees. If you are logged in under the same user name, then you can work with the same partner or employee data in the Siebel PRM Manager as in other Siebel Business Applications.

This guide covers features of the Siebel PRM Manager that are particularly useful in working with your partners. It does not cover many of the features that the Siebel PRM Manager has in common with Siebel Sales, Siebel Service, and Siebel Call Center. For more information on these common features, see *Siebel Applications Administration Guide* .

Screens That Are Specific to the Siebel PRM Manager

In addition to incorporating the functionality of other Siebel Business Applications, the Siebel PRM Manager has specific screens that are used only for managing partners:

- **Home.** The Siebel PRM Manager home page includes lists of records that you might want to work on, such as your prospective partners and your current fund requests. Items on these lists are links that you can click to display more information about them. The home page is fully customizable.

- **Partners.** The Partners screen lets you record general information about your partners and helps you manage your relationship with them. For example, it lets you work with the Partner Profile and Partnership Profile, it lets you assess your partners' performance, it lets you enter and look up partner management activities, contacts, and notes, and it lets you view your partners' progress in your training and certification programs.
- **Partner Programs.** The Program Partner screen lets you set up partner programs, view partner program applications from the Siebel PRM Portal, and accept or reject those applications. It also allows you to set up and maintain eligibility criteria for each partner program.
- **Partner Operations.** The Partner Operations screen lets partner managers view the transactional data for a given partner, giving an overall view of the partner's operations. You can look up a partner and see its accounts, contacts, opportunities, orders, quotes, and service requests.
- **Administration - Partner.** The Administration - Partner screen lets you do much of the work that you must do to add a new partner company, such as adding a record for the partner, assigning user IDs and passwords to partner users, and approving and registering partner companies. In this screen you can complete the necessary steps to get a partner company started, including creating a new organization and putting it in the proper place in the hierarchy. You can also administer partner information, such as adding or changing information about users, or about the partner organization.
- **CHAMP Planning.** Siebel PRM provides tools to support the Channel and Alliance Management Process (CHAMP), which helps alliance and partner organizations improve business performance. You can use the CHAMP Planning screen to create new initiatives, which are corporate strategies for a given period. After you have created an initiative, you can add partners as participants, and then create a specific partner plan for working with each participant. Finally, you can add objectives that help your partners accomplish the goals of the plan.
- **Certifications.** The Certification screen lets you set up programs to certify partners. For example, you might require that your partners be certified in a certain product or service that you offer to make sure that your partners deliver those products or services in the same way that your company delivers them. You can use this screen to define any levels of certification that you choose, and any criteria that you choose for each level of certification.
- **Fund Design.** Market development funds are funds that are allocated for joint marketing activities during a certain period. You use these funds, either directly or indirectly, to help your partners with activities that can generate demand for your product or service. The Fund Design screen lets you create market development funds by specifying how much is in each fund and which partners participate in and can request funding.
- **Fund Requests.** After market development funds have been created, partners or partner managers make requests for specific use of these funds, such as paying for a partner to participate in a trade show where they display your product. The Market Development Fund Requests screen lets you work with and approve these requests.

Supported Browsers

Like other Siebel Business Applications, Siebel PRM is Web-based, which means users can use a Web browser to work with Siebel PRM. For more information on the browsers supported by Siebel Business Applications, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

Siebel PRM Mobile Web Client

In addition to working directly through the Web in connected mode, you and your partners can use your Siebel Business Applications through the Siebel Mobile Web Client. The Siebel Mobile Web Client lets you or your partners work when you are disconnected from the Web and synchronize data with the rest of the Siebel database later.

This is useful if you or your partners want to work on a laptop when you are traveling and synchronize with the main Siebel database when you return to the office.

When you set up mobile users, you must associate a routing model with each mobile user. The routing model describes the data to be synchronized between the user's local database and the server database. You must use one of the following:

- Mobile PRM Manager users must use the routing model named *Mobile Client - Standard*.
- Mobile PRM Portal users must use the routing model named *Mobile Partner User*.

In addition, a mobile PRM Portal user must have only one responsibility, *Partner User - Mobile*, to prevent the mobile user from seeing views with unsynchronized data.

For security purposes, mobile PRM Portal users must have access to the brand owner’s private network or connect through a virtual private network. For more information about using the Siebel Mobile Web Client, see *Siebel Mobile Web Client Administration Guide*.

3 Setting Up Siebel PRM

Setting Up Siebel PRM

This chapter discusses how to set up Siebel PRM. It includes the following topics:

- *Installing Siebel PRM*
- *Activating Workflows for Siebel PRM*
- *Configuring Siebel PRM*
- *Personalizing Siebel PRM*
- *Setting Up Siebel PRM Web Services*
- *Setting Up Oracle Business Intelligence for Siebel PRM*
- *Process of Setting Up Siebel PRM*
- *Configuring Visibility for Siebel PRM*

Installing Siebel PRM

To install Siebel PRM, you must:

- **Install a Web Server.** Like other Siebel Business Applications, Siebel PRM includes Siebel Application Interface. The Web server must be already installed before you install Siebel PRM.
- **Install the Siebel Server.** When you install the Siebel Server, you must enable at least the following components to use Siebel PRM:
  - Siebel eChannel
  - Workflow Management
  - Communications
- **Configure Server Components.** After installing the server, you must configure the following server components:
  - **Siebel Communications Server.** For users to send email or fax messages you must configure the Siebel Communications Server. For information about setting up the Siebel Communications Server, see *Siebel CTI Administration Guide* .
  - **Chart Server.** For users to produce charts, you must configure the Chart Server. For information about setting up the Chart Server, see the *Siebel Installation Guide* .
  - **Documents Server.** For users to produce presentations, proposals, or correspondence, you must enable eDocuments during installation and configure the Document Server. For information about setting up the Document Server, see *Siebel Applications Administration Guide* .
- **Configure Siebel Management Console.** After installing, you must start the Siebel Management Console portal to use the correct anonymous login. In the Enhanced Authentication section, edit the following values:
  - Anonymous User Name = guestcp

    - Anonymous User Password = *your password for guestcp*

- **Configure LDAP.** In order to use the Siebel PRM new user registration, you must have LDAP configured.

For information about which Web servers are supported, see *Siebel System Requirements and Supported Platforms on Oracle Technology Network* .

For information about installing Siebel Business Applications, see the *Siebel Installation Guide* .

For information about configuring LDAP, see *Siebel Security Guide* .

Activating Workflows for Siebel PRM

In order to use Siebel PRM, you must activate the Registration and Commerce workflows. Siebel PRM also includes other workflows that you might want to activate. For more information about activating workflows, see *Siebel Business Process Framework: Workflow Guide* .

Activating the Registration Workflows

You must activate the Registration workflows to let new partners register through the Siebel PRM Portal. For more information about partner registration, see *Working with New Partners*.

Activate the following User Registration workflows:

- User Registration Process
- User Registration SubProcess
- User Registration Initial Process
- User Registration Forgot Password Process
- User Registration Forgot Password Process - CX Partner Portal
- User Registration Process OUI
- User Registration SubProcess OUI

After you activate the User Registration workflows, navigate to the Administration - Runtime Events screen and then the Events view. In the Event List, click the Reload Runtime Events Menu option.

Activating the Commerce Workflows

Activate the Commerce workflows to allow partner commerce. For more information about partner commerce, see *Managing Sales with Siebel PRM*.

Activate the following commerce workflows:

- All workflows in which the Group field has the value eSales.
- The workflow named "eChannel - Cancel Order Process"
- The workflow named "eChannel Go to Current Quote View (eSales)"
- The workflow named "eChannel Shopping Cart Scenarios Workflow"

Activating the Opportunity Management Workflows

Siebel PRM includes the following workflows that provide email notification about the status of opportunities in order to facilitate the sales process. You might choose to activate these, depending on your business model.

Activate the following opportunity management workflows:

- Email Notification of Assigned Opportunity
- Email Notification of Pending Opportunity
- Email Notification of Inactive Opportunity
- Email Notification of Lost Opportunity
- Email Notification of Won Opportunity

For more information about these workflows, see the topic about opportunity workflows in *Siebel Applications Administration Guide* .

Activating the Partner Program Workflows

Siebel PRM includes workflows used in partner programs. Activate the following workflows:

- PPR Auto Approval Workflow
- PPR Expire Membership
- PPR Send Approval Email
- PPR Set Partner Program Inactive
- PPR Agreement Association Process
- PPR Agreement Cancel Process
- PPR Can Apply To Partner Program Process
- PPR Can Renew Program Membership Process
- PPR Get Partner Program Applications Process
- PPR Get Partner Program Memberships Process
- PPR Get Partner Programs Process
- PPR Membership Activation Workflow
- PPR Program Product Creation Workflow
- PPR Submit Partner Program Membership Application Process

Configuring Siebel PRM

Siebel PRM is fully configurable using Siebel Tools and any HTML editor or Web authoring application. You can configure the following:

- **Look and Feel.** You can configure the look and feel of Siebel PRM to be consistent with the look and feel of your own Web site.
- **Data Presentation.** You can configure business objects, business components, and fields presented in Siebel PRM in the same way that you do in other Siebel Business Applications. For example, you can add special fields or remove fields that are not needed in your business.
- **Architecture and Performance Preferences.** You can set logging, file size, timeout, and other system preferences.

CAUTION: When you configure Siebel PRM, you must not remove the logout page that appears when the user navigates to Logout, and instead display the anonymous user home page. If you do, the server does not terminate the session. Server sessions could accumulate and exceed the server's maximum.

For information about configuring Siebel PRM, see *Using Siebel Tools* .

Configuring Online Help

As with other Siebel Business Applications, Siebel PRM comes with online help. You can change the online help to suit your business model. For more information on customizing online help, see *Siebel Developer's Reference* .

Personalizing Siebel PRM

Personalization means showing customers, employees, and partners what they want and need to see.

Some personalization is built into Siebel PRM. For example, when partners use the Siebel PRM Portal, it greets them by name and displays content targeted to their needs and interests.

You can personalize Siebel PRM further by using Siebel Personalization to define rules to show and hide views, applets, and content dynamically. Personalization deployment rules can depend on data such as users' personal profile information, date ranges, their company, geographical information, and other parameters.

For information about administering personalization, see *Siebel Personalization Administration Guide* .

Setting Up Siebel PRM Web Services

If you want to use the Partner Program, Partner Registration, or Partner Locator Web services, you must set them up as described in this topic.

Note: Other Web services are used by the Siebel PRM ASIs, and information on setting them up is provided in *Setting Up Application Services Interfaces for Siebel PRM*.

To set up the Siebel PRM Web services

1. Activate the Web service:
    a. Navigate to the Administration – Web Services screen, then the Inbound Web Services view.
    b. In the Name field, query for the desired Web service.
    c. In the Status field, select Active.
2. Set up a service port for a Web service business process
    a. Add one or more new records to the Service Ports list.
    b. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter a name for the port, preferably one that provides information about the purpose of the service
Type	Select a PRM workflow processes or business services. After you have made this selection, this field displays the type you have selected, Workflow Process or Business Service.
Business Service/Business Process	After you have made a selection in the Type field, this field displays the name of the workflow process or business service you selected.
Transport	Select a transport method (for example, HTTP).
Address	Enter the address of your Siebel server.
Binding	Select a binding (for example, SOAP).

    c. In the Operations list, add a new record and select a method for the Web service.
3. Create a Web Services Description Language (WSDL) file to be used by the developer working on the partner application:
    a. Scroll up to the Inbound Web Services list at the start of the page.
    b. Select the Web service.
    c. Click Generate WSDL.

    This step creates the Web Service Description Language (WSDL) file that describes the Web service, including what actions of functions the service performs based on the messages it receives or sends. WSDL is a standard is being defined by the World Wide Web Consortium; PRM uses version 1.1 of WSDL.

Setting Up Oracle Business Intelligence for Siebel PRM

Both the Siebel PRM Manager and the Siebel PRM Portal use Oracle Business Intelligence to allow partner managers and partners to analyze partner performance and many other aspects of business performance. For information about installing and setting up Oracle Business Intelligence, see *Oracle Business Intelligence Infrastructure Installation and Configuration Guide*.

Process of Setting Up Siebel PRM

In general, the channel operations manager does the preliminary work of setting up Siebel PRM when it is first deployed. After this preliminary planning and administrative work is done, the channel manager can add new partner companies and employees.

To set up Siebel PRM, perform the following tasks:

1. *Setting Up the Organization Structure for Siebel PRM*. Organizations are one way to control the data people can see. For example, if a user displays the All Contacts view, the contacts in that user's organization appear. Organizations also provide structure to organize relationships with partners through the hierarchy, and provide a way to set up and group partner employees. You must plan the organization hierarchy for your own company and your partner companies.
2. *Defining Partner Responsibilities*. Responsibilities determine which views people can see. For example, employees have a responsibility that includes the My Contacts view, managers have a responsibility that also includes My Team's Contacts view, and higher managers have a responsibility that also includes the All Contacts view. You control which responsibilities are available to partners. You must create the appropriate responsibilities so they are available to assign to users when you add the users.
3. *Setting Up Access Groups and Categories for Siebel PRM*. You use access groups and categories to share master data, such as literature and products, with partners. Access groups are groups of partner companies to which you can assign master data, regardless of their place in the organization hierarchy. Categories are groupings of master data.
4. *Creating Price Lists for Siebel PRM*. The channel operations manager must create the appropriate price lists for partners, so the channel manager can assign these to new partner companies that are added.
5. *Setting Up Automatic Routing of Information for Siebel PRM*. Optionally, you use Siebel Business Process Designer and Siebel Assignment Manager to route data automatically. For example, you can automatically send email to partners when certain application events occur.
6. *Adding Partner Companies and Employees*. After you have done the preliminary work of setting up Siebel PRM, you can add partner companies and employees.
7. *Creating CHAMP Metrics*. If you are planning to use CHAMP planning to work with your partners, create CHAMP metrics.

> **Note:** If you are using Siebel Application Network for real-time integration, in addition to the setup tasks described in this chapter, you must perform the setup tasks described in *Setting Up Application Services Interfaces for Siebel PRM*.

Setting Up the Organization Structure for Siebel PRM

This task is a step in *Process of Setting Up Siebel PRM*.

Siebel business Applications let you divide your business into organizations. Organizations usually represent businesses or divisions of businesses, and they are one way to control visibility to data. For example, when users choose All Contacts, they display the contacts in their own organization.

Each partner company is represented by one or more organizations. If you put multiple partner companies in one organization, then employees of one company can see data that belongs to the other company. You avoid this problem by putting companies in organizations of their own.

You can create a hierarchical organization structure, which has one organization under another.

When you create the organization structure, be aware that it affects visibility in the Pick Partner dialog box. Whenever channel managers use a dialog box that lists partners, the dialog box includes the partners in their own organization and in suborganizations of that organization. However, if the user has access to the All Partners Across Organizations view, then the Pick Partner dialog box includes partners in all organizations. This visibility in the Pick Partner dialog box makes it easier for partner managers to work with partner records. For more information about configuring visibility, see *Configuring Visibility for Siebel PRM*.

You can set up your partner hierarchy in different ways, depending on your business requirements. For example, you can:

- Set up the organization hierarchy so channel managers are in organizations of their own, and the partner companies that report to each manager are in organizations that are under that manager's organization. Then, when channel managers use the Pick Partner dialog box, the partner organizations that they manage are visible.
- Set up organizations that reflect the structure of your partner programs. For example, you can set up one organization for your resellers, another for your service partners and a third for alliance partners. Channel manager employees would be placed in the organization for which they worked, and would have visibility to the partners belonging to that organization.
- Set up an organization hierarchy structure where all partners report to the main brand owner organization. Channel manager employees would be a part of this main organization, so they would be able to see the partners when they use the Pick Partner dialog box.

If a partner company is large, you can create a hierarchical structure with multiple organizations for just that company. For example, if you assign opportunities to different regional divisions within a partner company, you can create a structure with one organization representing the entire partner company and organizations under it in the hierarchy representing its regional divisions. Then, you can assign an opportunity to a regional division so only that division can view it. This structure would also let you delegate the administration of each region to different administrators, have sales representatives and employees associated with the region in which they work, and organize other company data by region.

When your company first deploys Siebel PRM, the channel operations manager uses the Administration - Group screen to set up the overall organization structure, and uses the Administration - Partner screen to add organizations representing existing partners.

When your company adds new partners, channel managers use the Administration - Partner screen to add organizations representing the new partner companies. For more information on working with organizations using the Administration - Group screen, see *Siebel Applications Administration Guide* and *Siebel Security Guide* . For more information about adding a partner organization using the Administration - Partner screen, see *Working with New Partners*.

CAUTION: Always use the Administration - Partner screen to create organizations representing partner companies. Use the Administration - Group screen only to set up the overall organization structure. For example, to set up organizations for consulting partners, software partners, and so on. Do not use this screen for setting up organizations for individual partner companies.

Defining Partner Responsibilities

This task is a step in *Process of Setting Up Siebel PRM*.

Responsibilities specify which views users can access.

For example, you can create the responsibilities of Salesperson, which includes the My Opportunities view; Sales Manager, which includes both the My Opportunities and My Team's Opportunities views; and Sales Director, which includes the My Opportunities, My Team's Opportunities, and All Opportunities views.

If you are using delegated administration, you make one partner employee the delegated administrator by assigning that employee the responsibility of Partner Operations Manager, which lets that partner employee see the delegated administration views of the Siebel PRM Portal. Then, while adding employees, the delegated administrator assigns them responsibilities that you have created.

An employee in your company (usually your system administrator) must create the responsibilities. To make sure that partner users are not given access to inappropriate data, delegated administrators at partner companies cannot create responsibilities. They can only select from the list of responsibilities to which you have given them access.

Use the Administration - Application screen, Responsibilities view to create responsibilities.

In the seed data that is distributed with Siebel PRM, all responsibilities on the Siebel PRM Manager side begin with "Channel," and all responsibilities on the Siebel PRM Portal side begin with "Partner." The responsibilities included in the seed data are shown in the following tables. The following table shows the responsibilities included in Siebel PRM seed data with views in Siebel PRM Portal.

Responsibility	Description
Partner Operations Manager	The main administrative role in the partner company, with access to the Delegated Administration views and most other views in the Siebel PRM Portal. This responsibility is given to a small number of users in the partner company.
Partner Relationship Manager	The manager at the partner company responsible for daily interactions with the brand owner. Has access to all views in the PRM Portal except administrative views, such as the Delegated Administration views.
Partner Sales Manager	The sales manager at the partner company. Has access to the My and My Team's views of all sales-related screens, but not to service screens.
Partner Sales Rep	The sales agent at the partner company. Reports to the partner sales manager. Has access to the My Views of all sales-related screens.
Partner Service Manager	The service manager at the partner company. Has access to the My and My Team's views of all service-related screens, but not to sales screens.
Partner Service Rep	The service agent at the partner company. Reports to the partner service manager. Has access to the My Views of all service-related screens.
Self-Registered Partner Agent	Self-registered partner. Has access to a limited set of views on the Siebel Partner Portal. Does not have access to views that display transactional data such as Opportunities, Accounts, Contacts or Orders.

Responsibility	Description
Unregistered Partner Agent	An anonymous browser.

The following table shows the responsibilities included in Siebel PRM seed data with views in Siebel Partner Manager.

Responsibility	Description
Channel Executive	The channel executive at the brand owner. Has access to all views for sales and service, including all across organizations views. Also has access to partner sales, service and marketing analysis views, and to revenues, forecasting, CHAMP and reports and charts.
Channel Partner Manager	The manager at the brand owner company responsible for daily interactions with the partner. Has access to the My and My Teams views of all sales and service-related screens, to CHAMP screen, and to forecasting screen.
Channel Marketing Manager	The manager at the brand owner company responsible for marketing activities. Has access to all marketing-related views, including marketing administration views and other related views, such as views in the MDF, Contacts, and Opportunities screens.
Channel Operations Manager	The system administrator at the brand owner company responsible for setting up and maintaining Siebel PRM. Has access to all administration screens.

Setting Up Access Groups and Categories for Siebel PRM

This task is a step in *Process of Setting Up Siebel PRM*.

Siebel business Applications include two different types of data:

- **Transactional Data.** This is data that users can create, read, edit, and delete. For example, opportunities, accounts, contacts, and service requests. This data can be assigned to individuals, to groups of individuals (such as a sales team), or to organizations.
- **Master (or Referential) Data.** This is data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

Channel managers use access groups and categories as follows to assign master data to partners:

- **Access groups.** These are groups of parties, such as organizations, divisions, user lists or positions. Individuals such as contacts or employees cannot be assigned directly to an access group. If you want to add an individual partner to an access group, you must add the partner to a user list and assign the user list to the access group.
- **Categories.** These are groups of data. For example, you might create a category with your product literature and frequently asked questions about a specific product line.

Before channel managers assign any master data to partner companies, the channel operations manager must analyze the way you need to share master data with your partners and create the appropriate categories and access groups.

For example, you have partners who sell different product lines that your company manufactures, such as servers and desktop computers. Some partners do not sell all of the products within a given product line; some might sell only the

most powerful servers or the low-priced desktops. In this situation, you can create categories for the product lines you sell, and also create categories for each individual product that you sell, for each specific model of server and desktop computer. Then, you would associate sales literature, training courses, and other information about an entire product line with the appropriate category, and associate information about an individual product with the appropriate category.

Finally, you would create access groups for partners that sell each product line, such as Server Resellers and Desktop Resellers. Each of these access groups could have child access groups for each product within the product line. The access groups could then be associated with the appropriate catalogs and categories; for example, the server access group would be associated with the server catalog. The structure would be in place so that when partners are added to the access groups they get information about the product lines and the specific products they sell.

After the channel operations manager has done this initial work of setting up categories and access groups, the channel managers can assign data to partner companies. If you create new sales literature or a new training course, you associate it with the appropriate category to make it visible to the partners who need it. If you enroll a new partner, you associate it with the appropriate access groups to give it visibility to the master data it needs. For more information about working with categories and access groups, see *Siebel Security Guide* and *Siebel eSales Administration Guide* .

Creating Price Lists for Siebel PRM

This task is a step in *Process of Setting Up Siebel PRM*.

Price lists are the only type of master data that is not assigned using access groups, because price lists are usually assigned to smaller groups of partner companies than other forms of master data.

For example, you might assign master data to an access group called resellers, but you might have a different price list for each reseller, or you might have a standard price list for most resellers but special price lists for five of your resellers.

When you first set up Siebel PRM, your channel operations manager has to set up the appropriate price lists for your partners. The channel managers can assign these price lists to new partner companies that they add. For more information about setting up price lists, see *Siebel Pricing Administration Guide* .

Setting Up Automatic Routing of Information for Siebel PRM

This task is a step in *Process of Setting Up Siebel PRM*.

You can use Siebel Business Process Designer and Siebel Assignment Manager to automatically share information with your partners. The sample data shipped with Siebel PRM includes sample workflows that you might find useful.

Siebel Business Process Designer can provide automatic email or fax notification to partners under conditions that you specify. For example, whenever you assign a sales opportunity for more than $500,000 to a partner, Siebel Business Process Designer can automatically inform the partner by email that there is an important new opportunity.

Assignment Manager can automatically assign opportunities, service requests, and other data to the partner who is best able to work with them. You can create rules based on your partners' expertise, location, work load, and other conditions, and Assignment Manager automatically assigns data to the employee or partner who fits those rules. For example, it could assign a new service request to the employee or partner who has the required expertise, is in the correct location, and also has the fewest service requests in the queue.

For information about the workflows included in the Siebel PRM sample data, see *Activating Workflows for Siebel PRM*. For more information about defining rules to allow automatic email notification and customizing notification messages,

see *Siebel Business Process Framework: Workflow Guide* . For more information creating rules in Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Adding Partner Companies and Employees

This task is a step in *Process of Setting Up Siebel PRM*.

After you have completed the preliminary work of planning the organization structure, creating responsibilities, and setting up access groups and categories, then you must add partner companies and employees.

For information about adding new partner companies and employees, see *Working with New Partners*.

Creating CHAMP Metrics

This task is a step in *Process of Setting Up Siebel PRM*.

Channel and Alliance Management Process (CHAMP) helps brand owners and partners work collaboratively.

If you are using CHAMP planning, create metrics that let you measure your partners' performance when you are setting up Siebel PRM.

In your ongoing work with your partners, you create and execute initiatives and plans that will be evaluated using these metrics. For more information about CHAMP planning, see *CHAMP Planning*.

Configuring Visibility for Siebel PRM

Siebel PRM includes visibility enhancements to support collaboration of partners with the brand owner and with other partners, but they do not cover every possible scenario. If your business model requires different visibility enhancements, you can configure Siebel PRM with Siebel Tools in the following ways:

- Configuring visibility of pop-up or pick applets
- Configuring visibility of child objects in views
- Letting users change primary on visibility teams, including position- and organization-based teams

This topic describes the Siebel PRM visibility enhancements and gives you background information that you need to configure visibility. It does not give you detailed instructions for working in Siebel Tools.

For information about using Siebel Tools, see *Using Siebel Tools* .

About Visibility Enhancements in Siebel PRM

Visibility is important to Siebel PRM, because it facilitates collaboration between partners and other partners or the brand owner.

To preserve the privacy of each company's data, partners do not have visibility to all records associated with certain business components, only to the records in their organization.

For example, in other Siebel Business Applications, if you navigate to the Accounts screen, select an Account record, and then navigate to the Contacts view, you see all the contacts that are associated with that account. In the Siebel PRM Portal, the partner sees contacts associated with the account only if it is in the partner's organization.

This visibility capability applies to information in the following views in the Siebel PRM Portal:

- Opportunity screen: Contacts, Quotes, Revenues, Products, Activities
- Account screen: Opportunity, Quotes, Orders, Revenues, Activities

Siebel PRM also has enhancements that allow partners to collaborate with other partner companies by assigning data to positions or organizations in other partner companies. For more information, see *Partner-to-Partner Collaboration* .

Configuring Visibility

If your business model requires other visibility enhancements beyond these, you can configure visibility using the methods in the following topics:

- *Configuring Visibility of Pop-Up or Pick Applets in Siebel PRM*
- *Allowing Users to Change the Primary on a Visibility Team*

Configuring Visibility of Pop-Up or Pick Applets in Siebel PRM

Pop-up visibility determines what data is shown when a pop-up pick applet is displayed. For example, when a user associates a contact with an account, or adds a sales representative to the sales team. For more information about configuring visibility of pop-up or pick applets, see *Siebel Security Guide* .

Allowing Users to Change the Primary on a Visibility Team

Siebel Business Applications use visibility teams to determine what data is displayed in different views. There are both position- and organization-based visibility teams.

For example, the My Opportunity view is position-based; it shows opportunities where the user is on the Sales Team. The All Opportunities view is organization-based; it shows opportunities where the user's organization is on the organization team.

Both position- and organization-based visibility teams have primary members.

On position-based teams, the primary member is the only user who can delete the data. The primary member is also used occasionally in Forecasting and Analytics to determine which organization is credited for certain metrics. On organization-based teams, the primary on the organization team is also important in measuring results on certain metrics.

The developer can either restrict the ability to change the primary team member to the manager of the primary on the position team, or give this ability to all users. By default, for position-based teams, only the primary's manager can change the primary. By default, for organization-based teams, any user can change the primary organization.

To change the default behavior, the developer must add a user property to the business component called MVG Set Primary Restricted, with the following syntax:

- Name: MVG Set Primary Restricted: [visibility mvlink name]
- Value: TRUE or FALSE

Note: Users cannot directly delete the primary record from a position team. To delete the primary from the position team, you must go through a two-step process: first, designate a new member of the position team as primary, and then delete the original primary from the position team.

4 Setting Up Application Services Interfaces for Siebel PRM

Setting Up Application Services Interfaces for Siebel PRM

This chapter discusses how to set up Application Services Interfaces (ASIs), which allow integration of Siebel PRM with other CRM systems. It describes mandatory initial setup, and it documents workflows used by the ASIs. It includes the following topics:

- *About Application Services Interfaces and Siebel PRM*
- *About Setting Up ASIs for Siebel PRM*
- *Opportunity Transfer Workflows*
- *Shopping Cart Transfer Workflows*
- *Business Services Used by Siebel PRM ASIs*

About Application Services Interfaces and Siebel PRM

Siebel's Application Services Interfaces (ASIs) allow you to integrate Siebel business Applications with other applications in real time.

Two features of Siebel PRM use ASIs:

- **Opportunity Transfer.** Use this feature if some of your partners have their own CRM systems and do not want to use the Siebel PRM Portal to share opportunities. Opportunity transfer synchronizes your Siebel database with the partner's CRM system. You can transfer opportunities and the contacts, revenues, notes, and activities associated with them to your partner's CRM system, or you can query the partner's system to transfer their opportunities to your Siebel system. For more information about how opportunity transfer can be used in your business, see *Managing Sales with Siebel PRM*.
- **Shopping Cart Transfer.** Use this feature if your company wants to make sales through its own Web site but wants distributors or other partners to fulfill the orders. The customer can use Siebel Sales on your Web site to create a shopping cart and transfer the shopping cart to a partner's site for fulfillment. For more information about how shopping cart transfer can be used in your business, see *Managing Partner Commerce*.

For general information about ASIs, see *Siebel Application Services Interface Reference*. This chapter provides the following information that is specific to Siebel PRM:

- **Setting Up ASIs.** You must set up the ASIs shipped with Siebel PRM before you can use them. This chapter provides the procedures that you must perform to set up these ASIs.
- **ASI Workflows.** You might want to modify the way that Siebel PRM calls its ASIs to customize it for your business. This chapter documents the workflows that you might want to modify to change the ways that ASIs are called.

About Setting Up ASIs for Siebel PRM

You can set up ASIs for Siebel PRM in the following ways:

- *Setting Up Opportunity Transfer for Siebel PRM*
- *Setting Up Shopping Cart Transfer for Siebel PRM*

After following the specific instructions to set up either of these, you must follow the general instructions for setting up ASIs, which applies to both of them, described in *General Setup for ASIs for Siebel PRM*.

Setting Up Opportunity Transfer for Siebel PRM

To set up real-time opportunity transfer with a partner, you must:

- Set up the Web services
- Assign a port to the partner
- Do the general setup for ASIs

To set up the Web services, you must log in to Siebel PRM Manager as a user with system administrator privileges. Then, you must set up outbound Web services and set up inbound Web services. To set up real-time opportunity transfer, in addition to setting up inbound and outbound Web services, you must assign a port to the partner.

To set up outbound Web services

1. Navigate to the Administration - Web Services screen, then the Outbound Web Service view.
2. In the Outbound Web Service list, create a query to display all records with "External Opportunity*" in the Name field.
3. Select Active in the Status field of all of these records to activate these Web services.
4. Select the record with the name External Opportunity Create.
5. In the Service Ports list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter a name for the port, such as Transfer opportunity.
Port Type	Select External Opportunity Create.
Transport	Select HTTP.
Address	Specify the address or URL of the target system with which you are communicating. If you are communicating with another Siebel instance, enter the following: http://webserver/eai_*lang*/start.swe? SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1

Field	Description
	For the values in angle brackets, use the actual values for your system.
Protocol	Select SOAP_RPC_ENCODED.
Comment	Enter a comment for your own use.

6. In the Operation Bindings list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Operation Name	Use the list to select ExternalOpportunityCreateExecute.
Binding Property	namespace
Binding Value	http://siebel.com/asi/

7. Follow Step 1 through Step 6 to define the service port for External Opportunity Update, with these exceptions:
   a. In the Outbound Web Service list, select External Opportunity Update.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but change the port type value to External Opportunity Update.
   c. Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create, but change the Operation Name value to *ExternalOpportunityUpdateExecute*.
8. Follow Step 1 through Step 6 to define the service port for External Opportunity Query, with these exceptions:
   a. In the Outbound Web Service list, select External Opportunity Query.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but change the port type value to External Opportunity Query.
   c. Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create, but change the Operation Name value to *ExternalOpportunityQueryExecute*.

9. Follow Step 1 through Step 6 to define the service port for External Opportunity Update Response, with these exceptions:
   a. In the Outbound Web Service list, select External Opportunity Update Response.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but change the port type value to External Opportunity Update Response.
   c. Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create, but change the Operation Name value to *ExternalOpportunityUpdateResponseExecute*.

      > **Note:** Users must activate the workflows before they set up the Inbound Web services, or they cannot select the workflow under the Implementation Name in the Type field. For more information, see *Activate Workflows*.

To set up inbound Web services

1. From the Link bar, select Inbound Web Service.
2. In the Inbound Web Service list, create a query to display all records with "Siebel Opportunity*" in the Name field.
3. Select Active in the Status field of all of these records to activate these Web services.
4. Select the record with the name Siebel Opportunity Create.
5. In the Service Ports list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter a name for the port, such as Receive opportunity.
Type	Click the select icon. In the dialog box, add a new record and enter the following values in the new record: Implementation Type: Workflow Process Implementation Name: Select Opportunity Sharing Siebel Create Name: Siebel Opportunity Create After creating this record, select it as Type.
Business Service	Entered automatically when you select the Type.
Transport	Select HTTP.
Address	Enter: http://webserver/eai_lang/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1

Field	Description
	For the values in angle brackets, use the actual values for your system.
Bindings	Select SOAP_RPC_ENCODED.
Comment	Enter a comment for your own use.

6. In the Operations list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter *ExternalOpportunityCreateExecute*.
Business Service	Entered automatically when you create a new operation.

7. Follow Step 1 through Step 6 to define the service port for Siebel Opportunity Update, with these exceptions:
   a. In the Inbound Web Service list, select Siebel Opportunity Update.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but use the following values for the Type field when you create the new record in the list:
      - Implementation Type: Workflow Process
      - Implementation Name: Select Opportunity Sharing Siebel Update
      - Name: Siebel Opportunity Update
   c. Add a new record in the Operations list with the same values you entered for External Opportunity Create, but change the Name in the Operations list to *ExternalOpportunityUpdateExecute*.
8. Follow Step 1 through Step 6 to define the service port for Siebel Opportunity Query, with these exceptions:
   a. In the Inbound Web Service list, select Siebel Opportunity Query.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but use the following values for the Type field when you create the new record in the list:
      - Implementation Type: Workflow Process
      - Implementation Name: Select Opportunity Sharing Siebel Query
      - Name: Siebel Opportunity Query
   c. Add a new record in the Operations list with the same values you entered for External Opportunity Create, but change the Name in the Operations list to *ExternalOpportunityQueryExecute*.
9. Follow Step 1 through Step 6 to define the service port for Siebel Opportunity Update Response, with these exceptions:
   a. In the Inbound Web Service list, select Siebel Opportunity Update Response.
   b. Add a new record in the Service Ports list with the same values you entered for External Opportunity Create, but use the following values for the Type field when you create the new record in the list:
      - Implementation Type: Workflow Process

- Implementation Name: Select Opportunity Sharing Receive Update Response
- Name: SiebelOpportunityUpdateResponse

c. Add a new record in the Operations list with the same values you entered for External Opportunity Create, but change the Name in the Operations list to *ExternalOpportunityUpdateResponseExecute*.

To assign a port to the partner for real-time opportunity transfer

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partners list, drill down on the name of the partner company.
3. Navigate to the Integration view.
4. In the Integration list, add a new record, and use the list to select one of the ports you created for the Outbound Web Services list.
5. Continue to create a new record in the Integration list for each of the ports you created in the Outbound Web Services list that belongs to this partner.

Additional Setup Tasks

To finish setting up opportunity transfer, you must also complete the tasks described in *General Setup for ASIs for Siebel PRM*.

Setting Up the Partner

For testing, you can set up a second system to represent a partner. On the second system, repeat the steps for setting up the Web services and assigning the port. However, when you assign the port, as the partner, pick the organization that is the brand owner on the first system you set up.

After you have tested opportunity transfer and are ready to use it with actual partners, you must set up outbound ports for every partner to which you plan to transfer.

In the External Opportunity Create Web service, you must create a separate service port for each partner, as described in *Setting Up Opportunity Transfer for Siebel PRM*. Repeat this process for the rest of the outbound Web services. Then, use the Administration - Partner screen to assign the partner a port, as described in *Setting Up Opportunity Transfer for Siebel PRM*, where you must add the port with each partner's URL to that partner's integration profile.

In addition, you must talk to your partners to make sure the partners have some structure set up to receive a transfer. You must also make sure that partners have your organization listed as a partner in their own systems and that they have the correct value for the D-U-N-S number.

On your system, there is an Internal DUNS Number System Preference. This has to be changed to match your company's D-U-N-S number.

If your organization expects to receive transfers from partners, you must also make sure those partners are listed as partners and their D-U-N-S numbers are set correctly in your system.

Setting Up Shopping Cart Transfer for Siebel PRM

To set up real-time shopping cart transfer to a partner, you must:

- Set up the Web services
- Assign a port to the partner
- Change the Siebel PRM Portal configuration file
- Assign global product identifiers
- Check setup of ATP
- Do the general setup for ASIs

Setting Up Web Services for Shopping Cart Transfer

To set up the Web services, you must log in to Siebel PRM Manager as a user with system administrator privileges, and then set up outbound Web services and set up inbound Web services.

To set up outbound Web services

1. Navigate to the Administration - Service Administration screen, then the Outbound Web Service view.
2. In the Outbound Web Service list, create a query to display the records with "External Shopping Cart Create" in the Name field.
3. Select Active in the Status field of this record to activate this Web service.
4. In the Service Ports list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter a name for the port, such as Transfer Cart.
Port Type	Select External Shopping Cart Create.
Transport	Select HTTP.
Address	Specify the address or URL of the target system with which you are communicating. If you are communicating with another Siebel instance, enter the following: http://webserver/eai_lang/start.swe? SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1 For the values in angle brackets, use the actual values for your system.

Field	Description
Binding	Select SOAP_RPC_ENCODED.
Comment	Enter a comment for your own use.

5. In the Operation Bindings list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Operation Name	In the picklist, select *ExternalShoppingCartCreateSynchronize*
Binding Property	namespace
Binding Value	http://siebel.com/asi/

Note: Users must activate the workflows before they set up the Inbound Web services, or they cannot select the workflow under the Implementation Name in the Type field. For more information, see *Activate Workflows*.

To set up inbound Web services

1. Navigate to the Administration - Web Services screen, then the Inbound Web Service view.
2. In the Inbound Web Service list, create a query to display the record with "Siebel Shopping Cart Create" in the Name field.
3. Select Active in the Status field of this record to activate this Web service.
4. Select the record with the name Siebel Shopping Cart Create.
5. In the Service Ports list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter a name for the port, such as Receive Cart.
Type	Click the select icon. In the dialog box, add a new record and enter the following values in the new record: Implementation Type: Workflow Process Implementation Name: Select *Transfer Cart Inbound Receive Process* Name: Siebel Shopping Cart Create

Field	Description
	After creating this record, select it as Type.
Business Service	Entered automatically when you select the port type.
Transport	Select HTTP.
Address	Enter: http://webserver/eai_lang/start.swe? SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1 For the values in angle brackets, use the actual values for your system.
Binding	Select SOAP_RPC_ENCODED.
Comment	Enter a comment for your own use.

6. In the Operations list, add a new record, and enter the values in the following table in the fields of the new record.

Field	Description
Name	Enter ExternalShoppingCartCreateSynchronize.
Business Service	Entered automatically when you create a new operation.

Assigning a Partner Port for Real-Time Shopping Cart Transfer

To set up real-time shopping cart transfer, in addition to setting up inbound and outbound Web services, you must assign a port to the partner. If you are not using middleware, you might want to set up a different port for each partner.

To assign a port to the partner for real-time shopping cart transfer

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. Drill down on the partner company.
3. Navigate to the Integration view.
4. In the Integration list, add a new record and select the port you created in the Outbound Web Services list.

Change the PRM Portal Configuration File

The final step to allow shopping cart transfer is to change the configuration file for the Siebel PRM Portal.

To change the parameters to allow shopping cart transfer

1. Use any text editor to open the configuration file for the Siebel PRM Portal, which is the file installation directory\siebsrvr\bin\lang\scw.cfg.
2. In the [InfraShoppingService] section of the file, edit the EnableTransferCart parameter as follows:

   ```
   EnableTransferCart=TRUE
   ```

3. Change this parameter in the Server Administration screen as follows:
   a. Navigate to the Server Administration screen, then the Components view.
   b. Navigate to the Component Parameters view.
   c. In the Components list, search for eChannel Object Manager in the Name field.
   d. In the Component Parameters list, find the parameter EnableTransferCart and select TRUE as its value.
4. Restart your server.

Global Product Identifiers

The brand owner and partners uniquely identify products using the Global Product Identifier field defined in the Product Administration screen of Siebel Business Applications (or the equivalent field of other applications that your partners use).

To receive shopping carts, the partners must have the same products as the brand owner in their product databases and they must use the Global Product Identifier. If a partner that is receiving a shopping cart transfer does not have a product with a matching Global Product Identifier, the transfer fails.

Before using shopping cart transfer, make sure the brand owner and partners have defined the relevant products in their respective applications. This is generally done as an offline batch process.

Checking Setup of ATP

If you are using ATP functionality, you must set it up to call your partner's ATP engine (or your own internal ATP engineer).

Alternatively, you can modify the workflows so they do not use the ATP step. For information about modifying workflows, see *Shopping Cart Transfer Workflows*.

This topic describes how to set up ATP functionality for testing purposes.

> **Note:** Before performing the following procedure, make sure that you are using the ATP ASI Test service for the ATP Web Service.

To set up ATP functionality for testing purposes

1. Navigate to the Administration - Web Service screen, then the Outbound Web Service view.
2. Find the Web service named *External ATP Check*.
3. Change the value for Address to *ATP ASI Test*.
4. Change the value for Transport to *Local Business Service*.
5. Change the value for Binding to *Property Set*.
6. Create a new record in the Operation Bindings list with Operation Name=*Execute*, Bind Property=*namespace*, and Binding Value=*http://siebel.com/asi/*.
7. If you have tried to run this service before, you must restart the server.

Additional ATP Setup Tasks

To finish setting up shopping cart transfer, you must also complete the tasks described in *General Setup for ASIs for Siebel PRM*.

General Setup for ASIs for Siebel PRM

To set up either opportunity transfer or shopping cart transfer, in addition to the tasks described previously, you must also perform the tasks in this topic:

- Activate workflows
- Assign D-U-N-S numbers

Activate Workflows

For either opportunity transfer or shopping cart transfer, you must activate the workflow processes used for real-time integration. Activate all workflows where the Group field has the value PRM ASI.

Note: For testing, you must perform this task on the second system as well.

You activate workflows in Siebel Tools. For more information, see *Siebel Business Process Framework: Workflow Guide* .

Assigning D-U-N-S Numbers

For either opportunity transfer or shopping cart transfer, you must enter a D-U-N-S number for your own company and for all partner companies that use ASIs. The ASIs use the D-U-N-S number to uniquely identify the companies that are sending and receiving information.

Though it is recommended that you use the D-U-N-S number, you can use any unique identification number that you and your partners agree on.

You must also assign D-U-N-S numbers for Accounts that you transfer back and forth to make sure both systems are referring to the same account. Alternatively, you can change the inbound workflows to search for the Account Name instead of the D-U-N-S number when checking to see if the Account already exists.

To set D-U-N-S numbers

1. Set the D-U-N-S number for your own company as follows:
   a. Navigate to the Administration - Application screen, then the System Preferences view.
   b. Search for a preference named *Internal DUNS Number* and enter its value.
2. Set the D-U-N-S number for all partner companies that use ASIs as follows:
   a. Navigate to the Partners screen, then the Partner List view.
   b. In the Partners list, drill down on the record for the partner company.
   c. In the More Info view, enter the value in the DUNS# field.

> **Note:** The D-U-N-S numbers that your partners use must match the D-U-N-S numbers you use. The D-U-N-S number you enter for a partner in your system must match the D-U-N-S number that partner uses for itself in its system. The D-U-N-S number you enter for your own company in your own system must match the number the partner uses for your company in its system.

You do not need to modify these workflows, but you can modify them to suit your business model.

Opportunity Transfer Workflows

The workflow processes described in this topic are associated with opportunity transfer. They are used for the following functions:

- Transferring an opportunity
- Updating an opportunity
- Requesting an opportunity update

Either the brand owner or the partner can transfer an opportunity, update the opportunity, or request an update. The following descriptions refer to the two systems involved as "System A" and "System B." These can refer to either the brand owner or the partner's system, depending on who ran the opportunity transfer, updated the opportunity, or requested an update.

Workflows to Transfer an Opportunity

The workflows to transfer an opportunity are called in the following order:

- **Opportunity Sharing Pick Partner.** When the brand owner or partner navigates to the Transfer button on the Transfer Opportunity Child form, it calls the Opportunity Sharing Pick Partner workflow. This workflow retrieves the partner's ID and passes it on to the Opportunity Sharing External Create workflow, which the Opportunity Sharing Pick Partner workflow calls as a subprocess.
- **Opportunity Sharing External Create.** This workflow captures the object ID of the opportunity that is being transferred. It changes the opportunity's transfer status to Transfer In Progress. It then creates an internal key that System A uses to reference the opportunity. This workflow passes the opportunity ID, opportunity key, and the partner ID to the workflow Build Siebel Message, which it calls as a subprocess.

- **Opportunity Sharing Build Siebel Message.** This workflow uses the opportunity ID to gather all the necessary information on the opportunity and put it into a Siebel message. Opportunity Sharing Build Siebel Message also collects the partner information and System A's organizational information, and adds it to the Siebel message. This Siebel message is passed back to Opportunity Sharing External Create, which transfers it to system B and waits for a response.
- **Opportunity Sharing Siebel Create.** System B receives the Siebel message and runs the Opportunity Sharing Siebel Create workflow. Opportunity Sharing Siebel Create first inserts the opportunity's account by calling **PRM ANI Inbound Create Account, and** then inserts the Opportunity's information. If successful, it creates a key that System B uses to reference the opportunity, updates the Transfer Status on system B to Transfer Successful, and stores System A's key. This workflow then adds System B's key and the current transfer status to the Siebel message and sends the message back to System A.
- **Opportunity Sharing Receive Create Response.** After System A receives the response, it calls the Opportunity Sharing Receive Create Response. This workflow updates the status of the transfer based on the response. It also stores System B's key.

Workflows to Update an Opportunity

After an opportunity has been transferred, the brand owner or partner can click the Update Opportunity button to update the transferred opportunity in the other company's system with new information that they have entered in their system. When the brand owner or partner navigates to this button, the following workflows are called in this order:

- **Opportunity Sharing External Update.** This workflow is called when the brand owner navigates to the Update button on the Transfer Opportunity Child form. Opportunity Sharing External Update calls Opportunity Sharing Set Update Status.
- **Opportunity Sharing Set Update Status.** This workflow first calls Opportunity Sharing Inbound or Outbound.
- **Opportunity Sharing Inbound or Outbound.** This workflow figures out whether this opportunity was originally sent to System B from System A or was originally sent to System A by System B. (That is, it determines whether this opportunity was originally an outbound opportunity or an inbound opportunity.) It also retrieves System B's key and ID of the partner to whom the opportunity was sent, and passes this information back to Opportunity Sharing Set Update Status. Opportunity Sharing Set Update Status updates the Transfer Status to Update Pending. Then, this workflow calls Opportunity Sharing Build Siebel Message, passing the opportunity ID, System A and System B's keys, and the partner ID. (Depending on your setup, this workflow might not be necessary. A call to this workflow can be replaced with a Siebel operation that queries the ANI Keymap business component.)
- **Opportunity Sharing Create Siebel Message.** This workflow creates a Siebel message and passes it back to Set Update Status, which passes the Siebel message back up to External Update. External Update transfers the Siebel message to System B.
- **Opportunity Sharing Siebel Update.** System B receives the Siebel message and runs Opportunity Sharing Siebel Update, which checks to see if it needs to insert the opportunity's account again by calling **PRM ANI Inbound Create Account.** It then updates the Opportunity's information. If successful, this workflow updates the Transfer Status on system B to Update Successful, and then adds the current transfer status to the Siebel message, which it sends back to System A.
- **Opportunity Sharing Receive Update Response.** After System A receives the response, it calls the Opportunity Sharing Receive Update Response workflow, which updates the status of the transfer based on the response.

Workflows to Receive an Opportunity Update

After an opportunity has been transferred, the brand owner or partner can click the Receive Update button to query the other company's system for new information that has been entered about the opportunity, and to update the opportunity in its own system with this new information. When the brand owner or partner navigates to this button, the following workflows are called in this order:

- **Opportunity Sharing External Query.** When the brand owner calls the Receive Update button on the Transfer Opportunity Child form, this workflow calls the Opportunity Sharing External Query workflow. External Query first uses the **Opportunity Sharing Inbound or Outbound** workflow to determine whether this opportunity was originally an inbound or an outbound opportunity, as described in *Workflows to Update an Opportunity*. Then, Opportunity Sharing External Query takes that information and creates a Siebel message with System A's and System B's keys. It then transfers this Siebel message to System B.
- **Opportunity Sharing Siebel Query.** When System B receives the Siebel message, it runs the Opportunity Sharing Siebel Query workflow. Opportunity Sharing Siebel Query makes sure the opportunity exists and then calls Opportunity Sharing Set Update Status.
- **Opportunity Sharing Set Update Status.** This workflow first calls the **Opportunity Inbound or Outbound workflow**, which does the following:
  - Determines whether this opportunity was originally an outbound opportunity or an inbound opportunity, as described in *Workflows to Update an Opportunity*.
  - Retrieves System A's key and the partner ID of the employee to whom the opportunity was sent, and passes this information back to Opportunity Sharing Set Update Status.

  Opportunity Sharing Set Update Status then updates the Transfer Status to Update Pending and calls the Opportunity Sharing Opportunity Build Siebel Message workflow to create a message containing the opportunity ID, System B and System A's keys, and the partner ID. After the Siebel message is passed back to Opportunity Sharing Set Update Status, this workflow passes the Siebel message back up to Opportunity Sharing External Update. **Opportunity Sharing External Update** transfers the Siebel message to System A.
- **Opportunity Sharing Siebel Update.** After System A receives the response, it calls Opportunity Sharing Siebel Update. This workflow returns a Siebel message, which Opportunity Sharing External Query transfers back to System B.
- **Opportunity Sharing Receive Update Response.** System B receives the Siebel message and calls Receive Update Response, which updates the status of the transfer based on the response.

Update of the Status Field by These Workflows

The final step in these opportunity transfer processes updates the status field to tell the user whether the transfer, send update, or receive update process was successful. The Transfer Status field can have the following values:

- **Blank.** The opportunity has never been transferred to a partner. In this situation, only the Transfer button is active. You cannot send or receive an update until after the opportunity has been transferred.
- **Transfer Pending.** The opportunity has been transferred to a partner, but the acknowledgement from the partner has not yet been received. In this situation, none of the transfer buttons are active.
- **Transfer Successful.** The opportunity has been transferred to a partner, and the acknowledgement indicates that the transfer went through. In this situation, only Send Update and Receive Update are active. Once an opportunity has been transferred successfully, it cannot be transferred again.

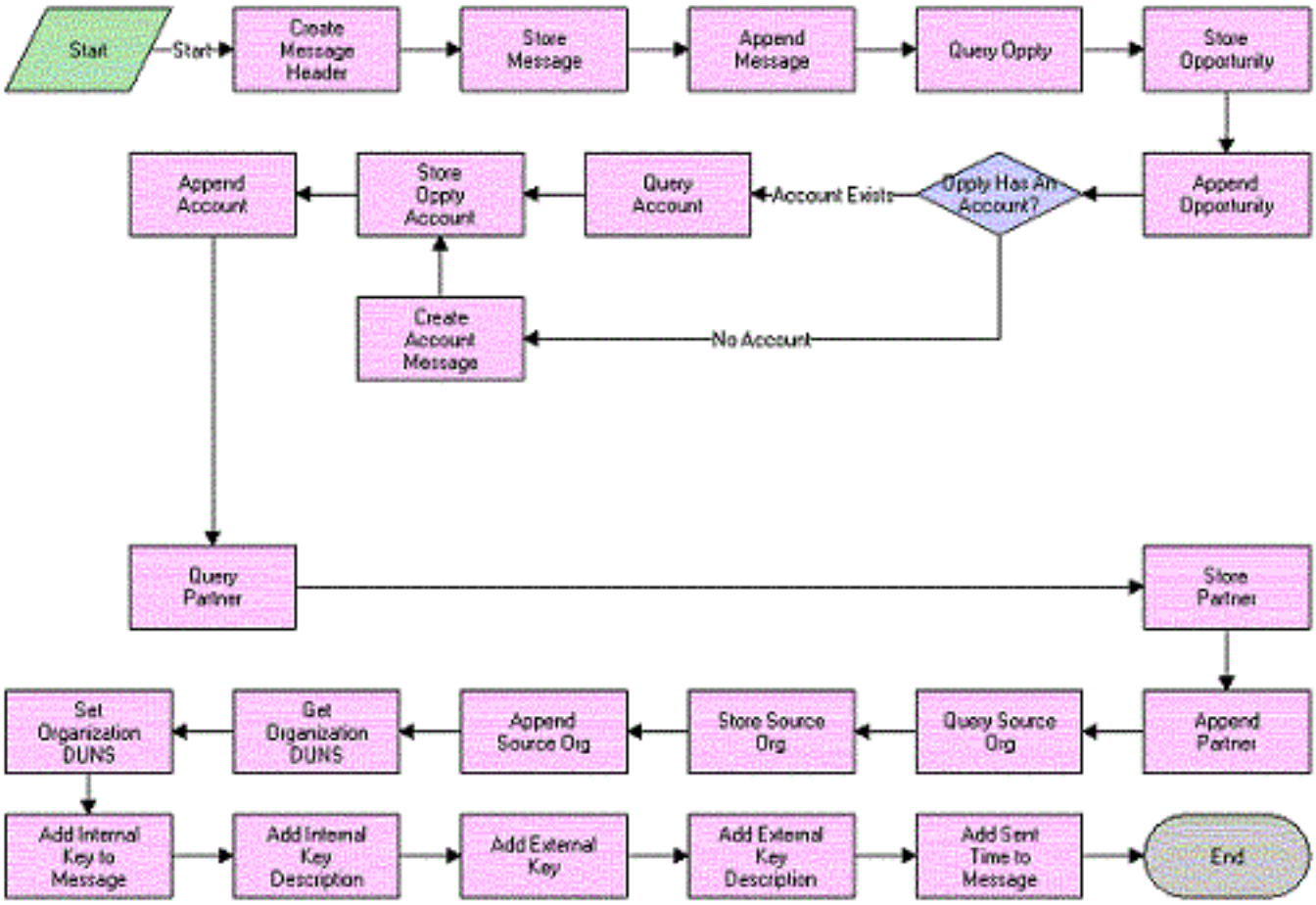
- **Transfer Unsuccessful.** The opportunity has been transferred to a partner, but the acknowledgement indicates that the transfer did not go through for one of these possible reasons:
    - The connection timed out
    - The opportunity already exists on the other system
    - The source organization is not listed as a partner in the other system
    - There was an exception with the insert step

  In this situation, the Transfer button is the only active one. The user can try again to transfer the opportunity to the same partner or a different one.
- **Update Pending.** The send update or receive update process is underway, but no response has yet been received. In this situation, none of the buttons are active.
- **Update Successful.** The send update or receive update process completed successfully. In this situation, the Send Update and Receive Update buttons are active.
- **Update Unsuccessful.** The send update or receive updated process failed, based on the return message from the partner's system, for one of these possible reasons:
    - The connection timed out
    - The opportunity does not exist on the other system
    - There was an exception with the update step

  In this situation, the Send Update and Receive Update buttons are active.

Opportunity Sharing Build Siebel Message

The Opportunity Sharing Build Siebel Message workflow process is shown in the following diagram.



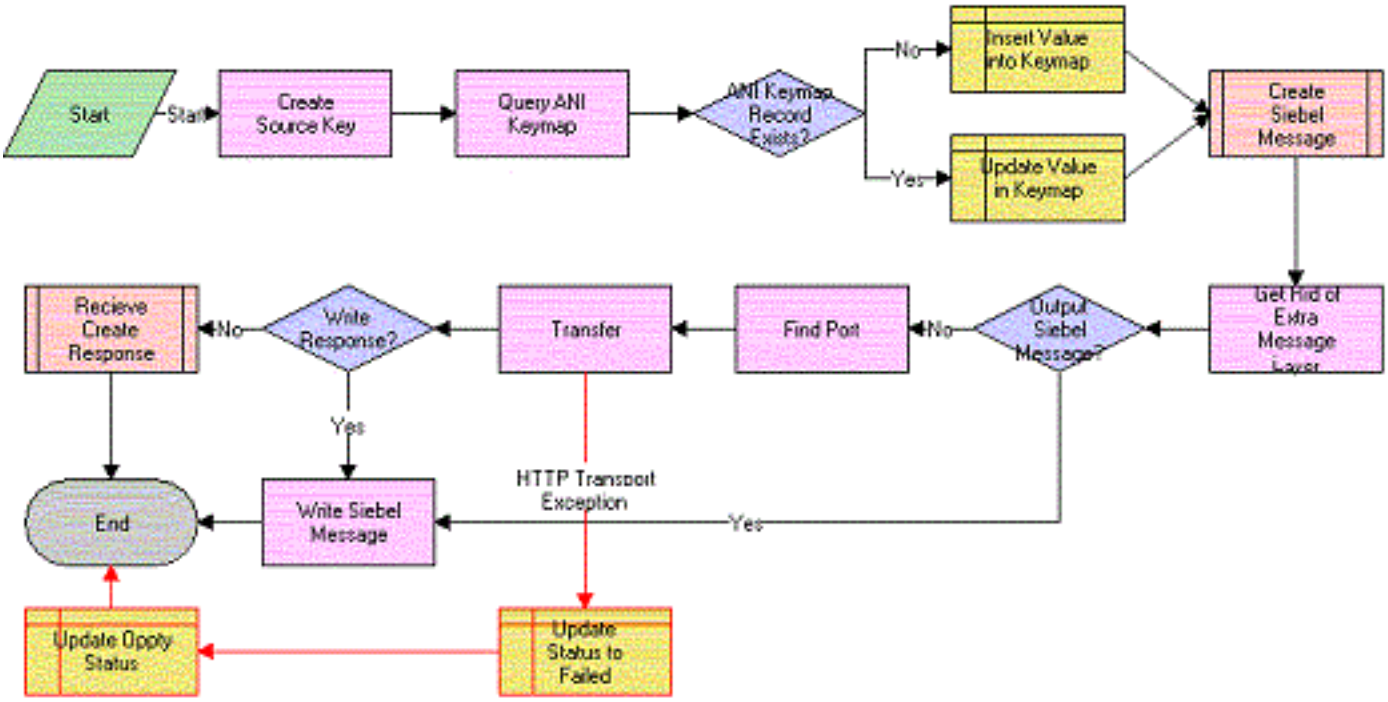
As shown in this diagram, the following events happen when this workflow is called:

- **Create Message Header.** This event creates an empty message header for the Siebel message. This header will eventually contain the transfer information.
- **Store Message Header/Append Message.** This event creates an empty Siebel message using the ANI Opportunity Message (PRM ANI) format and appends the message header to it.
- **Query Oppty.** This event queries the Siebel database for the opportunity matching the object ID and returns the account ID for the account of this opportunity.
- **Store Oppty & Append Oppty.** This event adds the opportunity to the Siebel message.
- **Oppty Has An Account.** This event checks to see if the account ID is null. If it is, the workflow does not need to query for an account.
- **Create Account Message.** If there is no account for this opportunity, this event creates an empty account property set to follow the ANI Opportunity Message (PRM ANI) format for the Siebel message.
- **Query Account.** If there is an account for this opportunity, this event returns the account information.
- **Store Oppty Account/Append Account.** This event adds the account information to the Siebel message.
- **Query Partner/Store Partner/Append Partner.** This event queries for the partner to whom the opportunity is being sent and appends that information to the Siebel message.
- **Query Source Org/Store Source Org/Append Source Org.** This event queries for the source organization and appends that information to the Siebel message.

- **Get Organization DUNS/Set Organization DUNS.** This event retrieves the source organization's D-U-N-S number and adds it to the Siebel message.
- **Add Internal Key.** This event adds the internal key to the Siebel message.
- **Add Internal Key Description.** This event adds the internal key description to the Siebel message.
- **Add External Key.** This event adds the external key to the Siebel message.
- **Add External Key Description.** This event adds the external key description to the Siebel message.
- **Add Sent Time to Message.** This event adds the current timestamp to the Siebel message.

Opportunity Sharing External Create

This Opportunity Sharing External Create workflow process is shown in the following diagram.



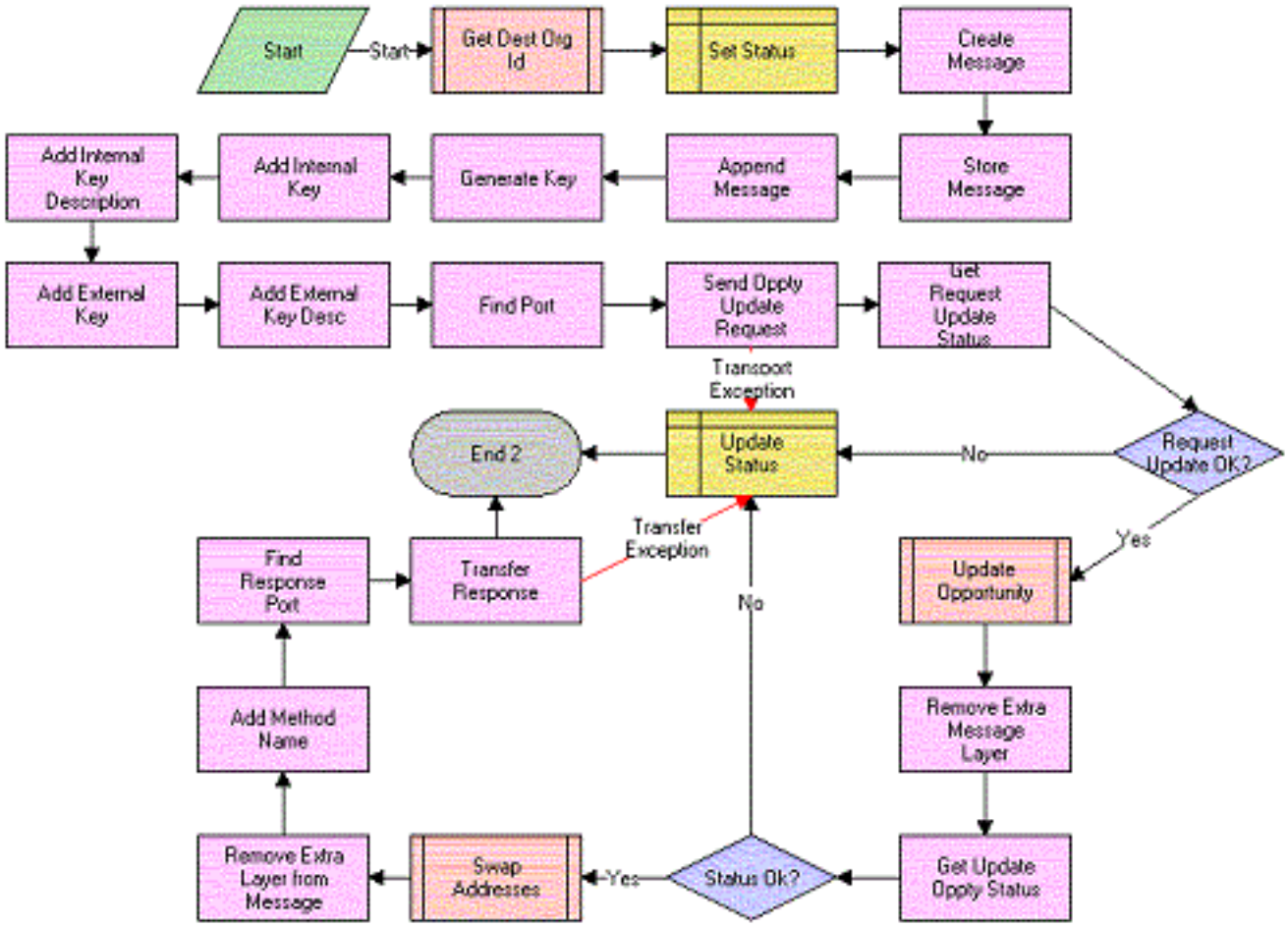
As shown in this diagram, the following events happen when this workflow is called:

- **Create Source Key.** This event generates an internal key from the process property internal key description. Currently, internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this workflow as a subprocess.
- **Query ANI Keymap.** This event searches for a transfer record for this opportunity in ANI Keymap, the buscomp that stores all the transfer information.
- **ANI Keymap Record Exist.** This event checks to see if the number of transfer records for this opportunity is greater than zero, that is, whether a transfer record already exists for this opportunity.
- **Insert Value into Keymap.** If a transfer record for this opportunity does not already exist, this event creates a new transfer record for this opportunity.

- **Update Value in Keymap.** If a transfer record for this opportunity already exists, this event updates the transfer status to Transfer In Progress.
- **Create Siebel Message.** This event calls the Opportunity Sharing Build Siebel message, passing in the internal key, internal key description, partner ID, and object ID, and returns a Siebel message.
- **Get Rid of Extra Message Layer.** This event removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.
- **Output Siebel Message.** This event checks to see if the value of the process property Write Orig File is Y or N.
- **Find Port.** This event finds the Web service port for the partner to whom the opportunity is being sent.
- **Transfer.** This event sends the opportunity to the other system.
- **Update Status to Failed.** If the transfer step returns an exception, this event updates the transfer status of the opportunity to Transfer Unsuccessful.
- **Write Response.** This event checks to see if the value of the process property Write Response to File is Y or N.
- **Write Siebel Message.** If Write Orig File is Y, this event writes the pretransfer Siebel message to an XML file. If Write Response to File is Y, this event writes the post-transfer Siebel message to an XML file.
- R**eceive Create Response.** This event calls the subprocess Oppty Sharing Receive Create Response, passing it the Siebel message received from the transfer.

Opportunity Sharing External Query

The Opportunity Sharing External Query workflow process is shown in the following diagram.



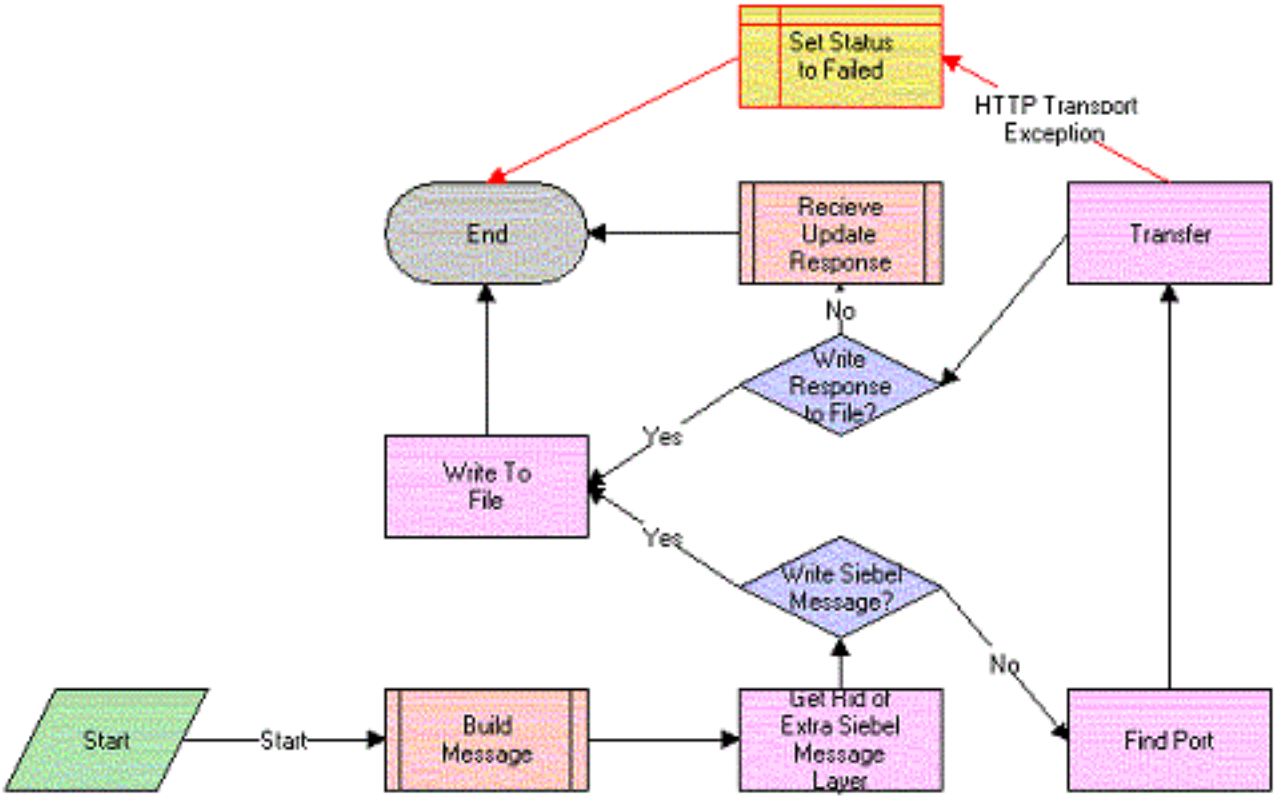
As shown in this diagram, the following events happen when this workflow is called:

- **Get Dest Org Id.** This event calls Opportunity Sharing Inbound or Outbound. This workflow returns the partner ID of the partner requesting an update, the external key, and external key description.
- **Set Status.** This event updates the transfer status to Update Pending.
- **Create Message/Store Message/Append Message.** This event creates an empty Siebel message.
- **Generate Key.** This event creates the internal key.
- **Add Internal Key.** This event adds the internal key to the Siebel message.
- **Add Internal Key Description.** This event adds the internal key description to the Siebel message.
- **Add External Key.** This event adds the external key to the Siebel message.
- **Add External Key Description.** This event adds the external key description to the Siebel message.
- **Find Port.** This event finds the Web service port for the partner.
- **Send Oppty Update Request.** This event sends this Siebel message to the other system and returns the response from the other system.
- **Get Request Update Status.** This event gets the transfer status from the response Siebel message.
- **Request Update Ok.** This event checks that the transfer status is successful.

- **Update Opportunity.** This event calls Opportunity Sharing Siebel Update as a subprocess, passing it the Siebel message, and returns the response Siebel message.
- **Remove Extra Message Layer.** This event removes the extra layer that is added when a Siebel message is passed up from a subprocess.
- **Get Update Oppty Status.** This event retrieves the status of the update from the Siebel message that Opportunity Sharing Siebel Update inserts before returning the message.
- **Status Ok.** This event checks to see if the update status is Update Successful.
- **Swap Addresses.** This event swaps the source organization and channel partner information, the internal key and external key, and the internal key description and the external key description.
- **Remove Extra Layer from Message.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This event removes that layer.
- **Add Method Name.** This event inserts the name of this method, Query, into the Siebel message. This will be used in a later workflow.
- **Find Response Port.** This event finds the Web service port for sending an update response for this partner.
- **Transfer Response.** This event transfers the Siebel message with the update status back to the partner.
- **Update Status.** If any of the transfer statuses from the Siebel message are Update Unsuccessful or any of the transfers returns an exception, this event updates the transfer status to Update Unsuccessful.

Opportunity Sharing External Update

The Opportunity Sharing External Update workflow process is shown in the following diagram.

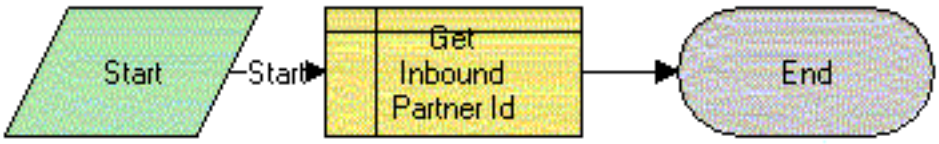


As shown in this diagram, the following events happen when this workflow is called:

- **Build Message.** This event calls the subprocess Opportunity Sharing Set Update Status, passing in the opportunity ID, and returns the partner ID and a Siebel message.
- **Get Rid of Extra Siebel Message Layer.** This event removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.
- **Write Siebel Message.** This event checks to see if the value of the process property Write Orig File is Y or N.
- **Find Port.** This event finds the Web service port for the partner.
- **Transfer.** This event sends the opportunity to the other system and returns a response Siebel message.
- **Write Response to File.** This event checks to see if value of the process property Write Response is Y or N.
- **Receive Update Response.** This event calls the subprocess Opportunity Sharing Receive Update Response, passing it the response Siebel message.
- **Write to File.** If Write Orig File is Y, this event writes the pretransfer Siebel message to an XML file. If Write Response to File is Y, this event writes the post-transfer Siebel message to an XML file.
- **Set Status to Failed.** If transfer returns an exception, this event updates the transfer status for this opportunity to Update Unsuccessful.

Opportunity Sharing Inbound or Outbound

The Opportunity Sharing Build Siebel Message workflow process is shown in the following diagram.



As shown in this diagram, the following event happens when this workflow is called:

- **Get Inbound Partner Id.** This event queries the ANI Keymap bus comp and retrieves the initial direction, the partner ID, the external key, and the external key description of this opportunity.

Opportunity Sharing Pick Partner

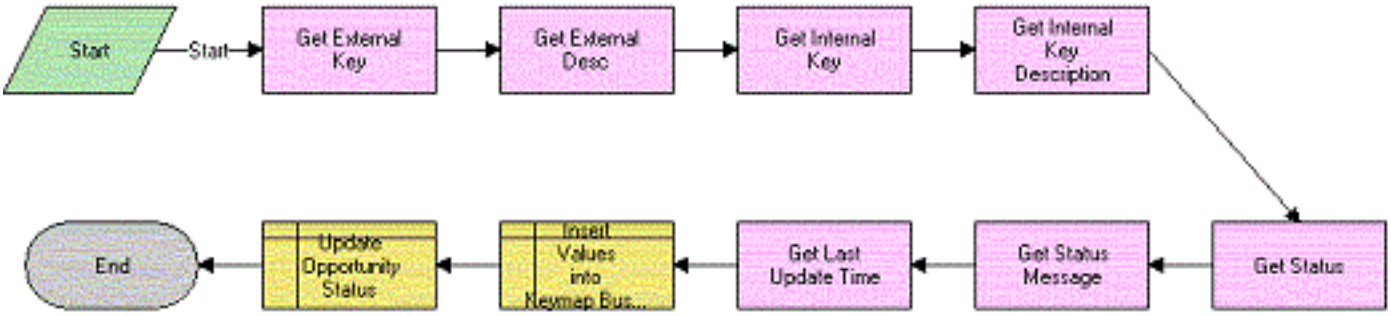
The Opportunity Sharing Pick Partner workflow process is shown in the following diagram.

As shown in this diagram, the following events happen when this workflow is called:

- **Catch Partner Id.** This event retrieves the Partner ID of the partner to whom the opportunity is sent, and stores it in a process property.
- **Send Opportunity.** This event calls Oppty Sharing External Create, passing it the partner ID.

Opportunity Sharing Receive Create Response

The Opportunity Sharing Receive Create Response workflow process is shown in the following diagram.

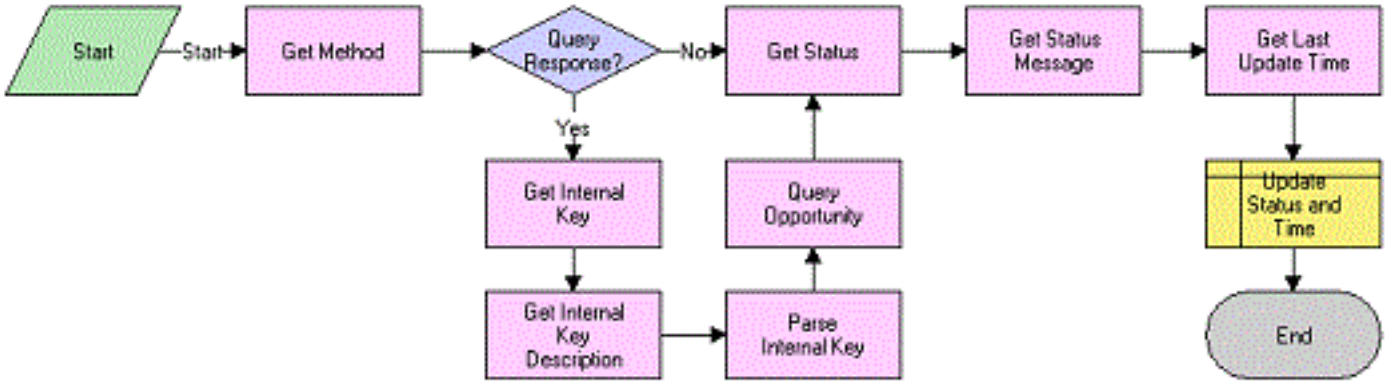


As shown in this diagram, the following events happen when this workflow is called:

- **Get External Key.** This event finds the value of the external key in the Siebel message and returns it.
- **Get External Key Desc.** This event finds the external key description in the Siebel message and returns it.
- **Get Internal Key.** This event finds the value of the internal key in the Siebel message and returns it.
- **Get Internal Key Description.** This event finds the value of the internal key description in the Siebel message and returns it.
- **Get Status.** This event returns the transfer status from the Siebel message.
- **Get Status Message.** This event returns the transfer status message from the Siebel message.
- **Get Last Update Time.** This event retrieves the time when the Siebel message was created, which was added to the Siebel message when it was created.
- **Insert Values into Keymap Bus Comp.** This event adds the external key, external key description, status, and the timestamp to the keymap record.

Opportunity Sharing Receive Update Response

The Opportunity Sharing Receive Update Response workflow process is shown in the following diagram.

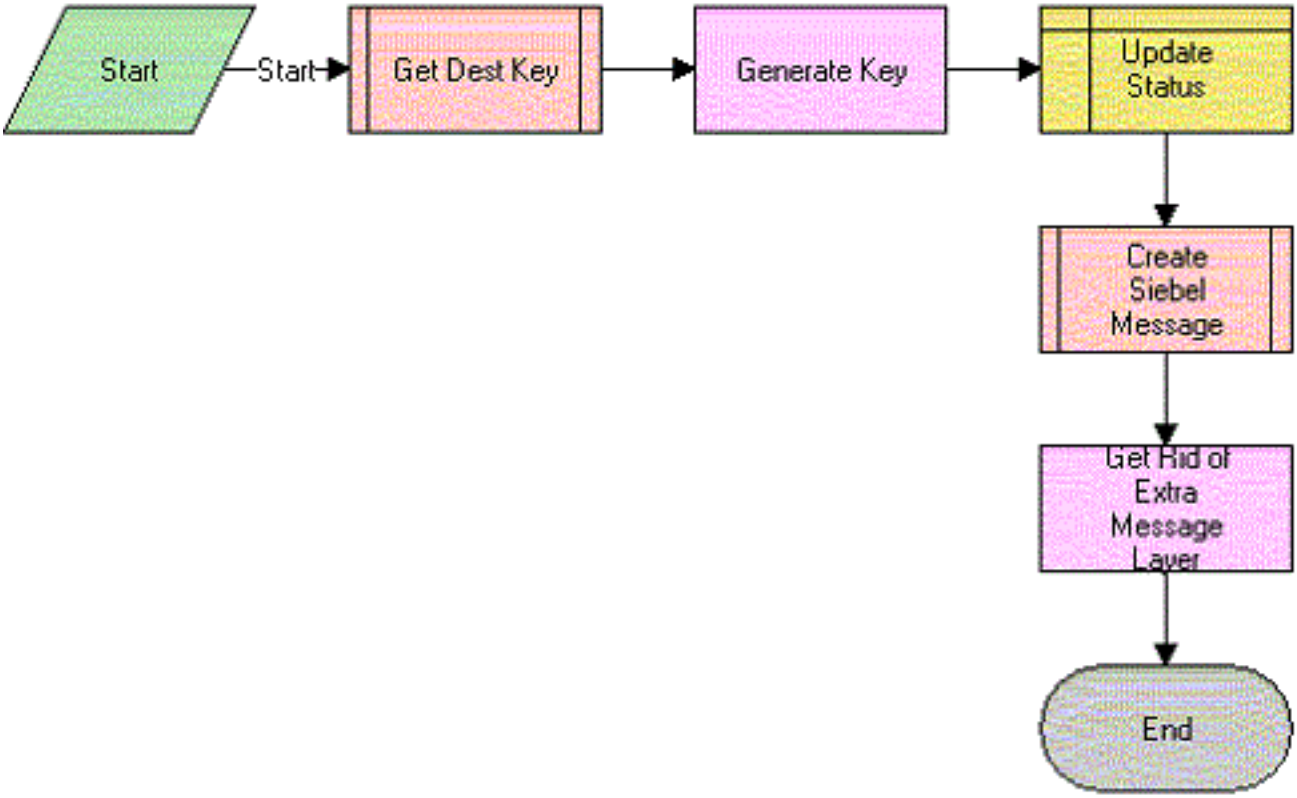


As shown in this diagram, the following events happen when this workflow is called:

- **Get Method.** This event returns the method value from the Siebel message. Both update and query use Opportunity Sharing Receive Update Response, and this method value tells the workflow whether this is a send update or receive update.
- **Query Response.** This event checks to see if this is a response from an update or if this is a response from a query.
- **Get Internal Key/Get Internal Key Description/Parse Key/Query Opportunity.** If this is a response from a query, this workflow is started from the inbound Web services, so there is no active object ID. The workflow needs to find the opportunity and retrieve the object ID. This group of steps returns the external key and the external key description and creates a search specification from them. Query Opportunity uses this search specification to find the opportunity and return its object ID. If this is a response from an update, the workflow is activated from the Opportunity Sharing External Update workflow and an object ID is passed in as an argument, so these steps are skipped.
- **Get Status.** This event returns the transfer status from the Siebel message.
- **Get Status Message.** This event returns the transfer status message from the Siebel message.
- **Get Last Update Time.** This event retrieves the time when the Siebel message was created, which was added to the Siebel message when it was created.
- **Update Status and Time.** This event updates the status and the timestamp to the keymap record.

Opportunity Sharing Set Update Status

The Opportunity Sharing Set Update Status workflow process is shown in the following diagram.

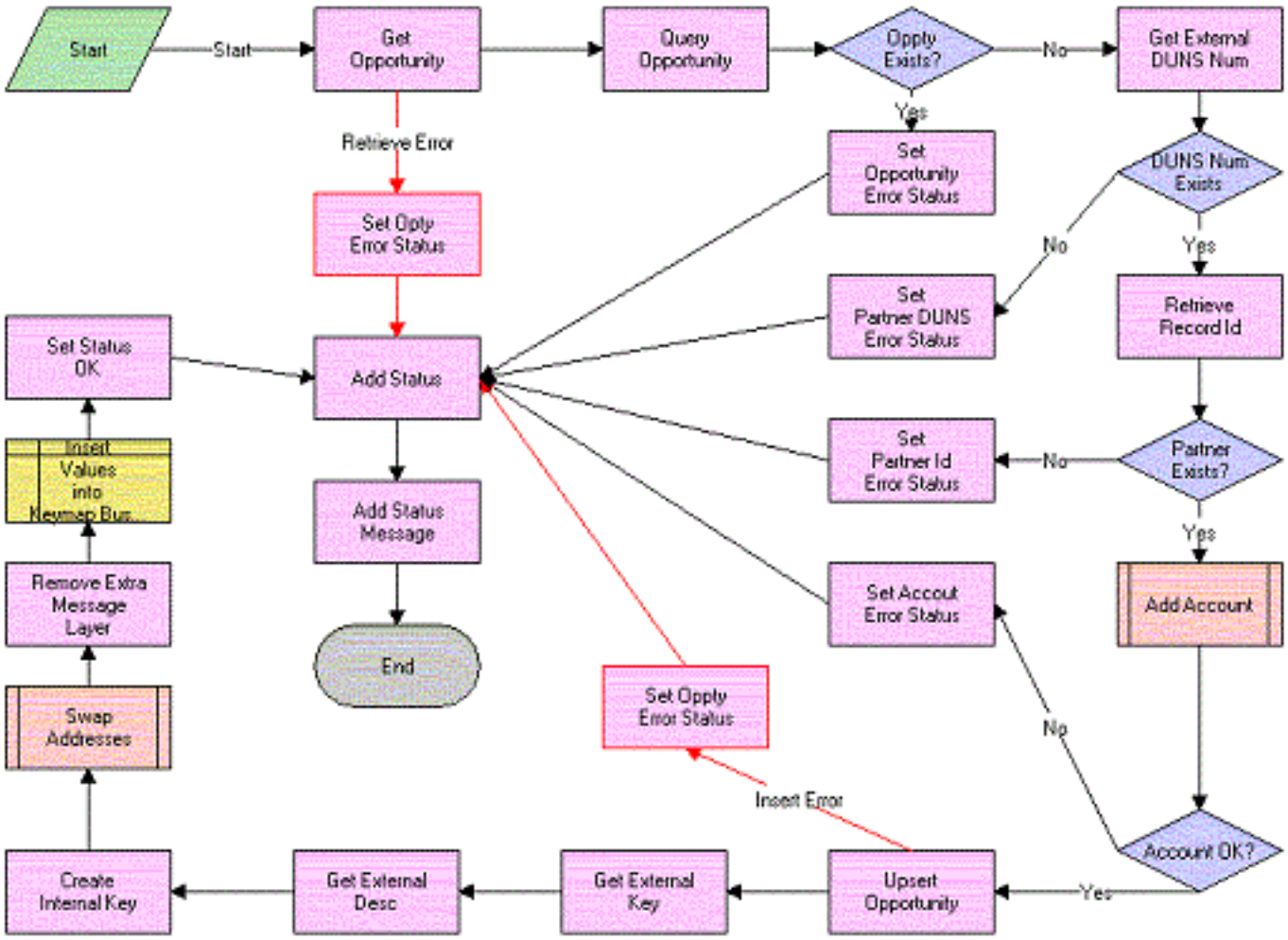


As shown in this diagram, the following events happen when this workflow is called:

- **Get Dest Key.** This event calls Opportunity Sharing Inbound or Outbound and returns the partner ID, external key, and external key description.
- **Generate Key.** This event generates an internal key from the process property internal key description. Currently, internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this as a subprocess.
- **Update Status.** This event updates the transfer status to Update Pending.
- **Create Siebel Message.** This event calls Opportunity Sharing Build Siebel Message, passing in an object ID, partner ID, external key, external key description, internal key, and internal key description. It returns a Siebel message.
- **Get Rid of Extra Message Layer.** This event gets rid of the extra layer that is added to a Siebel message when it is passed up from a subprocess.

Opportunity Sharing Siebel Create

The Opportunity Sharing Siebel Create workflow process is shown in the following diagram.



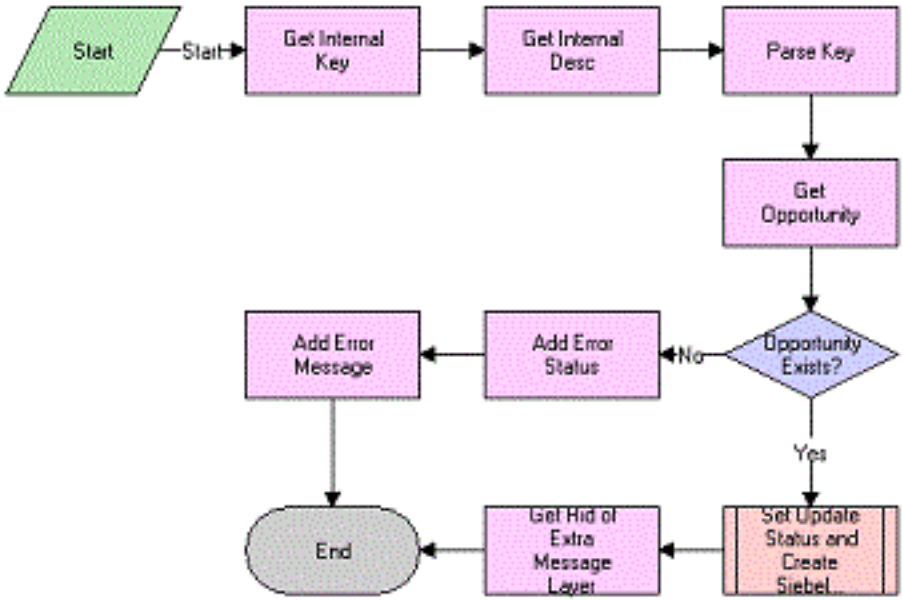
As shown in this diagram, the following events happen when this workflow is called:

- **Get Opportunity.** This event retrieves the opportunity property set from the Siebel message.
- **Query Opportunity.** Using the opportunity property set, this event searches for the opportunity in this database and returns the number of opportunities that match the search specification.
- **Oppty Exists.** This event checks to see if the number of opportunities found by the query is greater than zero, to determine whether the opportunity already exists.
- **Set Opportunity Error Status.** If the opportunity already exists, this event sets the status process property to an error status and sets the status message process property to the appropriate error message.
- **Get External DUNS Number.** If the opportunity does not exist, this event retrieves the source organization's D-U-N-S number.
- **DUNS Num Exists.** This event checks to see if the previous step returns an empty D-U-N-S Number.
- **Set Partner DUNS Error Status.** If the D-U-N-S number is empty, this event sets the status process property and sets the status message process property to the appropriate error message.
- **Retrieve Record Id.** If the D-U-N-S Number has a value, this event uses that value to find the partner ID of the source organization.
- **Partner Exists.** This event checks to see if the previous step returns an empty partner ID.

- **Set Partner Id Error Status.** If the partner ID is empty, this event sets the status process property and set the status message process property to the appropriate error message.
- **Add Account.** This event calls the PRM ANI Inbound Create Account Process, passing it the Siebel message, the name of the account integration object this process uses, and the account object hierarchy path. It returns an account status code and an account status message.
- **Account OK.** This event checks to see if the account status code equals the general error code.
- **Set Account Error Status.** If the account status code returned a general error, this event sets the status process property to an error status and sets the status message process property to the appropriate error message.
- **Upsert Opportunity.** This event inserts the opportunity property set into the Siebel CRM system.
- **Set Oppty Error Status.** If the opportunity insert returns an exception, this event sets the status process property to an error status and sets the status message process property to the appropriate error message.
- **Get External Key.** This event finds the value of the external key in the Siebel message and returns it.
- **Get External Desc.** This event finds the external key description in the Siebel message and returns it.
- **Create Internal Key.** This event generates an internal key from the process property internal key description. Currently, internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this as a subprocess.
- **Swap Addresses.** This event swaps the source organization and channel partner information, the internal key and external key, and the internal key description and the external key description.
- **Remove Extra Message Layer.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This event removes that layer.
- **Insert Values into Keymap Bus Comp.** This event creates a new transfer record for this opportunity.
- **Set Status OK.** This event sets the status process property to successful.
- **Add Status.** This event adds the status to the Siebel message. This is done whether there has been a problem and the status is an error code or whether the status is okay.
- **Add Status Message.** This event adds the status message to the Siebel message.

Opportunity Sharing Siebel Query

The Opportunity Sharing Siebel Query workflow process is shown in the following diagram.

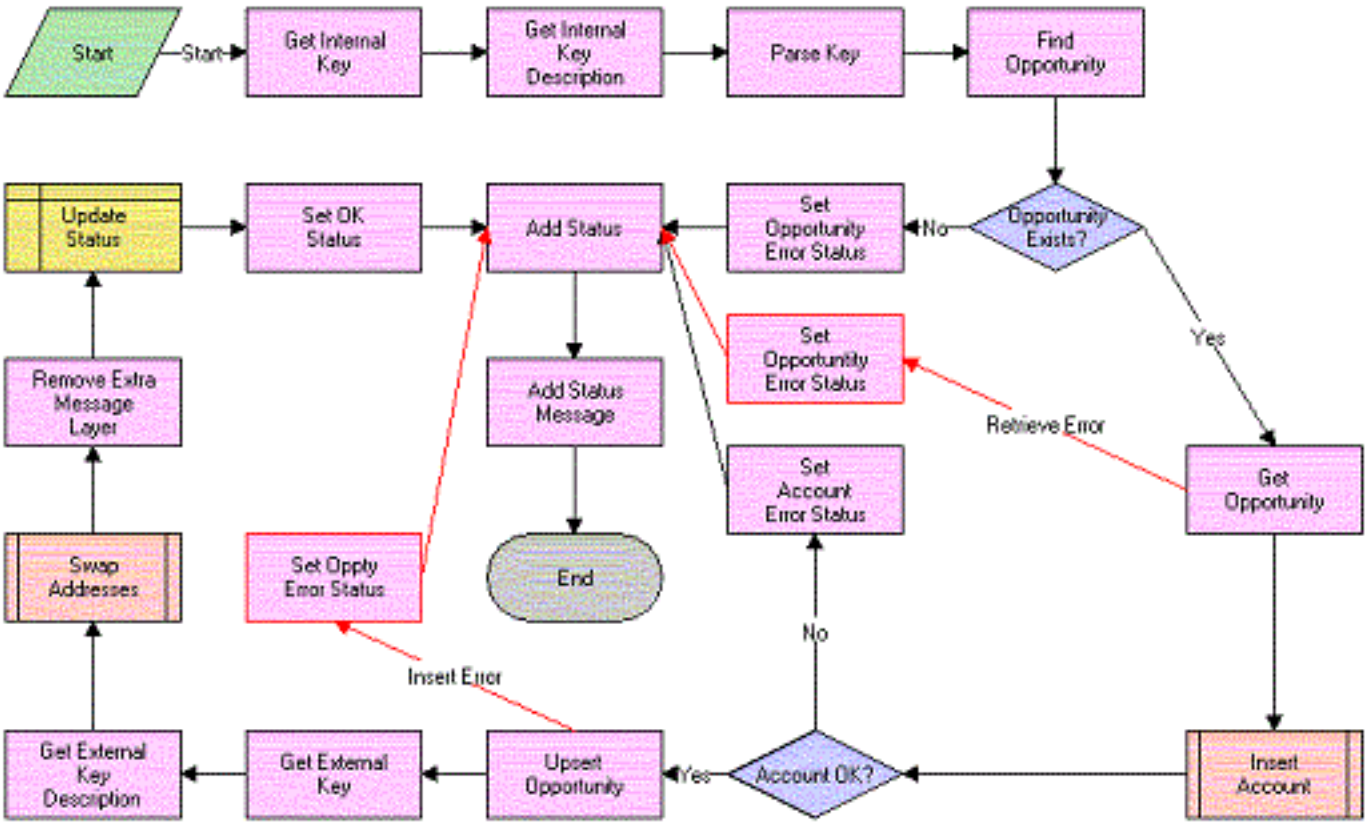


As shown in this diagram, the following events happen when this workflow is called:

- **Get Internal Key.** This event finds the value of the internal key in the Siebel message and returns it.
- **Get Internal Desc.** This event finds the internal key description in the Siebel message and returns it.
- **Parse Key.** This event takes in internal key and internal key description and creates a search specification.
- **Get Opportunity.** This event searches for the opportunity using the search specification.
- **Opportunity Exists.** This event checks to see if the number of opportunities found by the query is greater than zero to determine if the opportunity already exists.
- **Add Error Status.** If the opportunity does not exist, this event sets the transfer status in the Siebel message to an error status.
- **Add Error Message.** If the opportunity does not exist, this event sets the transfer status message in the Siebel message to an error status message.
- **Set Update Status and Create Siebel Message.** This event calls Opportunity Sharing Set Update Status, passing it the opportunity ID.
- **Get Rid of Extra Message Layer.** This event removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.

Opportunity Sharing Siebel Update

The Opportunity Sharing Siebel Update workflow process is shown in the following diagram.



As shown in this diagram, the following events happen when this workflow is called:

- **Get Internal Key.** This event finds the value of the internal key in the Siebel message and returns it.
- **Get Internal Key Description.** This event finds the internal key description in the Siebel message and returns it.
- **Parse Key.** This event takes in the internal key and internal key description and creates a search specification.
- **Find Opportunity.** This event searches for the opportunity using the search specification.
- **Opportunity Exists.** This event checks to see if the number of opportunities found by the query is greater than zero to determine if the opportunity already exists.
- **Set Opportunity Error Status.** If the opportunity does not exist, this event sets the status process property to an error status and set the status message process property to the appropriate error message.
- **Get Opportunity.** If the opportunity does exist, this event retrieves the opportunity property set from the Siebel message.
- **Insert Account.** This event calls PRM ANI Inbound Create Account Process, passing it the Siebel message, the name of the account integration object this process uses, and the Account Object Hierarchy Path. It returns an account status code and an account status message.
- **Account OK.** This event checks to see if the account status code equals the general error code.
- **Set Account Error Status.** If the account status code returned a general error, this event sets the status process property to an error status and sets the status message process property to the appropriate error message.
- **Upsert Opportunity.** This event updates the opportunity.
- **Get External Key.** This event retrieves the external key from the Siebel message.

- **Get External Key Description.** This event retrieves the external key description from the Siebel message.
- **Swap Addresses.** This event swaps the source organization and channel partner information, the internal key and external key, and the internal key description and the external key description.
- **Remove Extra Message Layer.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This event removes that layer.
- **Set Oppty Error Status.** If the opportunity update returns an exception, this event sets the status process property to an error status and sets the status message process property to the appropriate error message.
- **Update Status.** This event updates the transfer status and the timestamp for this transfer record.
- **Set OK Status.** This event sets the status process property to successful.
- **Add Status.** This event adds the status to the Siebel message. This is done whether there has been a problem and the status is an error code or whether the status is okay.
- **Add Status Message.** This event adds the status message to the Siebel message.

PRM ANI Inbound Create Account Process

The PRM ANI Inbound Create Account workflow process is used by both opportunity transfer and shopping cart transfer. This process is described in *PRM ANI Inbound Create Account Process Workflow*.

PRM ANI Inbound Addressing Change Process

The PRM ANI Inbound Addressing Change workflow process is used by both opportunity transfer and shopping cart transfer. This process is described in *PRM ANI Inbound Addressing Change Process Workflow*.

Shopping Cart Transfer Workflows

The workflow processes described in this topic are associated with shopping cart transfers.

These processes are used for the following functions:

- Outbound transfer
- Inbound transfer

They transfer as much data as is needed for the receiving system to be able to process the shopping cart. This includes sending information on the account and contact that serve as customers to the shopping cart, as well as the quote, any of the extended attributes of products in the shopping cart, and information about the source and destination organizations.

Workflows for Outbound Shopping Cart Transfer

Outbound shopping cart transfer uses the following workflows:

- *Transfer Cart Outbound Initial Workflow*. This workflow manages the general process flow, from the selection of the destination organization to the acknowledgment processing.

- *Transfer Cart Outbound Request Process Workflow*. This workflow controls the creation of the shopping cart data structure. Most of the work is done in the subprocesses; everything is pieced together here.
- *Transfer Cart Outbound Create Header Process Workflow*. This workflow gathers and sets data needed for the message header and creates the message header.
- *Transfer Cart Outbound Create and Append Process Workflow*. This workflow is used in many places as a utility workflow that creates the child hierarchy and appends the child instance to the parent object.
- *Transfer Cart Outbound Receive Acknowledgment Process Workflow*. This workflow handles the response generated by the external system.

Many of these workflows have steps with names similar to *Rename Child Object* and *Remove Message Layer*. These steps deal with formatting the data structures correctly as they are passed up from subprocesses, and they are not associated with any business logic.

Workflows for Inbound Shopping Cart Transfer

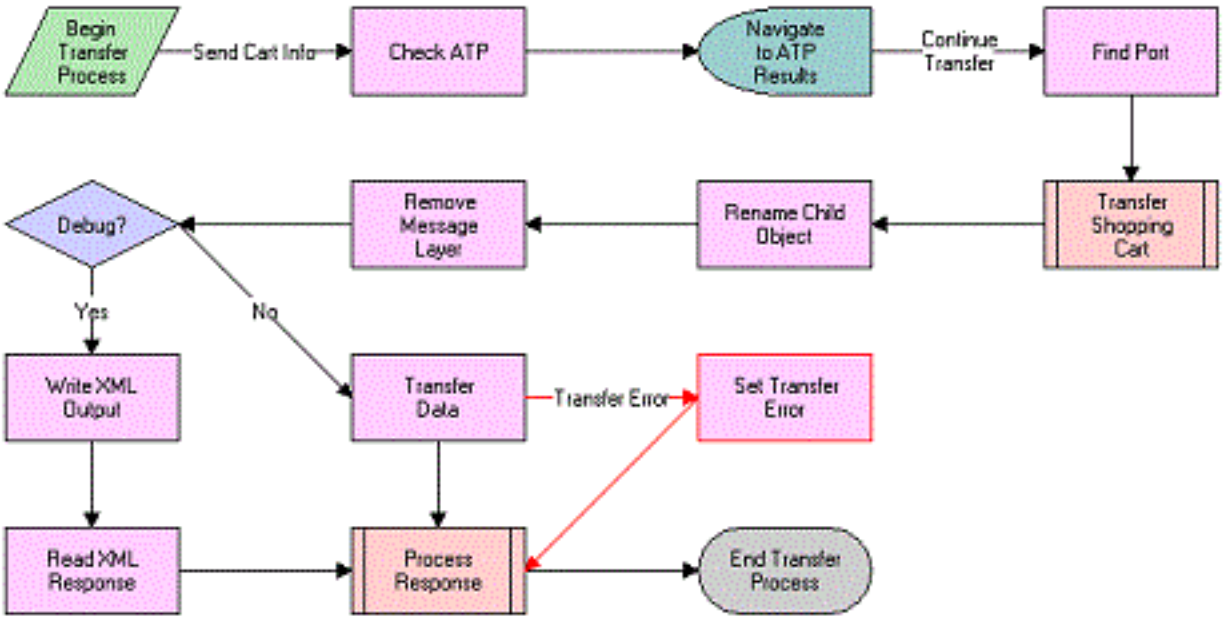
Inbound shopping cart transfer uses the following workflows:

- *Transfer Cart Inbound Receive Process Workflow*. This workflow handles the initial processing of the data.
- *Transfer Cart Inbound Create Cart Process Workflow*. This workflow handles the task of coordinating calls to the other subprocesses. If an error occurs with either the customer contact or an account, it uses user-configurable business logic to determine what happens next.
- *PRM ANI Inbound Create Account Process Workflow*. This workflow inserts an account record if the data is present and viable. It returns an error if the data is not viable and skips the insert steps if the data is not present, assuming that the customer has only contact information and no account.
- *Transfer Cart Inbound Create Contact Process Workflow*. This workflow creates the customer contact information if the data is present and viable. It returns an error if the data is not viable and assumes the contact is anonymous if the data is not present.
- *Transfer Cart Inbound Create Quote Process Workflow*. This workflow creates the quote (persistent shopping cart) after checking the data for integrity.
- *PRM ANI Inbound Addressing Change Process Workflow*. This workflow swaps the source organization and destination channel partner information.

Error handling is used to catch problems and report them to the external (requesting) system. Generally, if an error is found, the process stops and passes the error messages up to the calling process. The calling process then passes the error back to its calling process. When it reaches the first process, it returns an error saying that the transfer was unsuccessful.

Transfer Cart Outbound Initial Workflow

The Transfer Cart Outbound Initial workflow is shown in the following diagram.

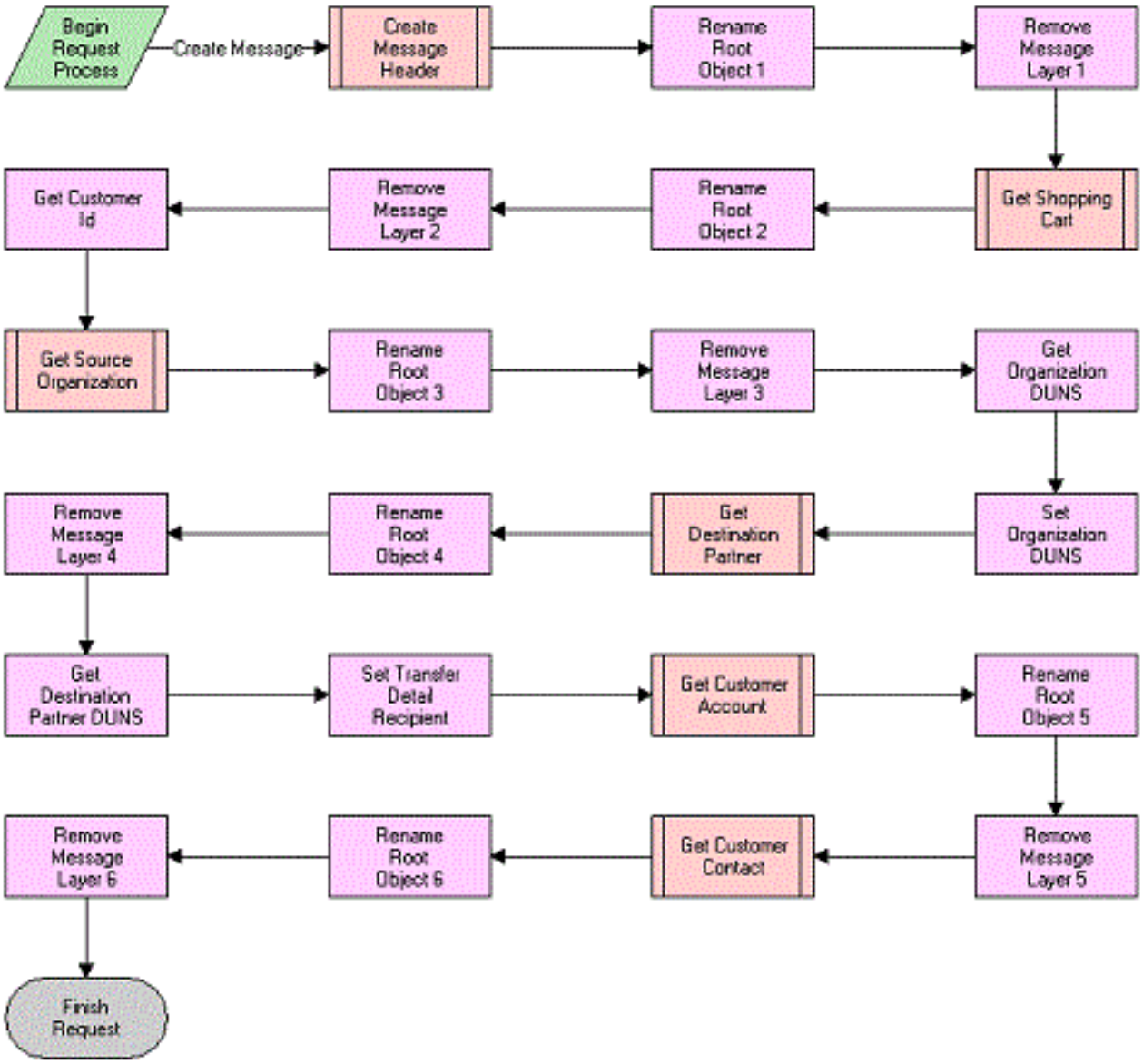


As shown in this diagram, the following events happen when this workflow is called:

- The first event checks for the availability of the items the customer wants to purchase.
- The next event finds the communication information associated with the partner and runs the **Transfer Cart Outbound Request Process** subprocess to create the shopping cart data structure.
- The next event checks to see if the brand owner is in debug mode (controlled by the Debug Flag in the Process Properties). If so, the brand owner needs to dump the data into a file and read in a suitable response from a file.
- Most of the time the Debug Flag is set to false, and allows use of the Web Services instead. In this situation, the RPC call is made and a response is received when Web services is complete.
- The Response is processed by **Transfer Cart Outbound Receive Acknowledgement Workflow** (either success or failure) as the final event in this workflow.

Transfer Cart Outbound Request Process Workflow

The Transfer Cart Outbound Request Process workflow is shown in the following diagram.

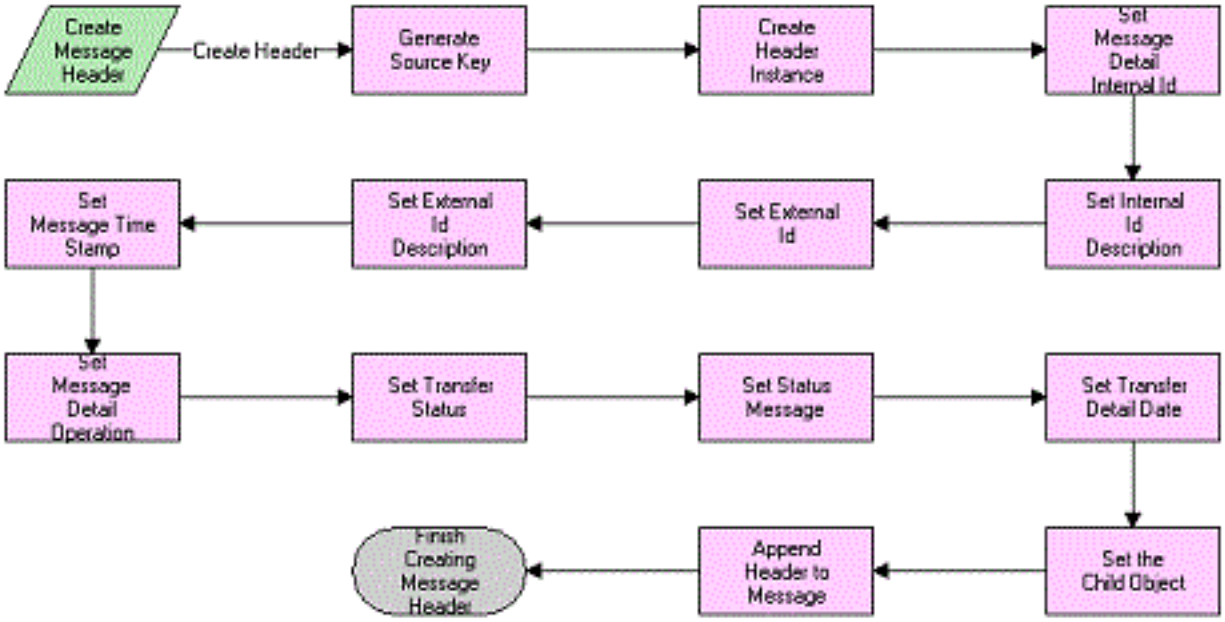


As shown in this diagram, the following events happen when this workflow is called:

- The first event creates the message header with information about the message itself including timestamps, and so on.
- The next event adds the shopping cart data (Quote, Quote Item, and so on) to the shopping cart data structure.
- The workflow then includes information about the source organization sending the data.
- Then, the workflow appends information about the destination partner to this message.
- Finally, the workflow adds the customer information, including account and customer data.

Transfer Cart Outbound Create Header Process Workflow

The Transfer Cart Outbound Create Header Process workflow is shown in the following diagram.

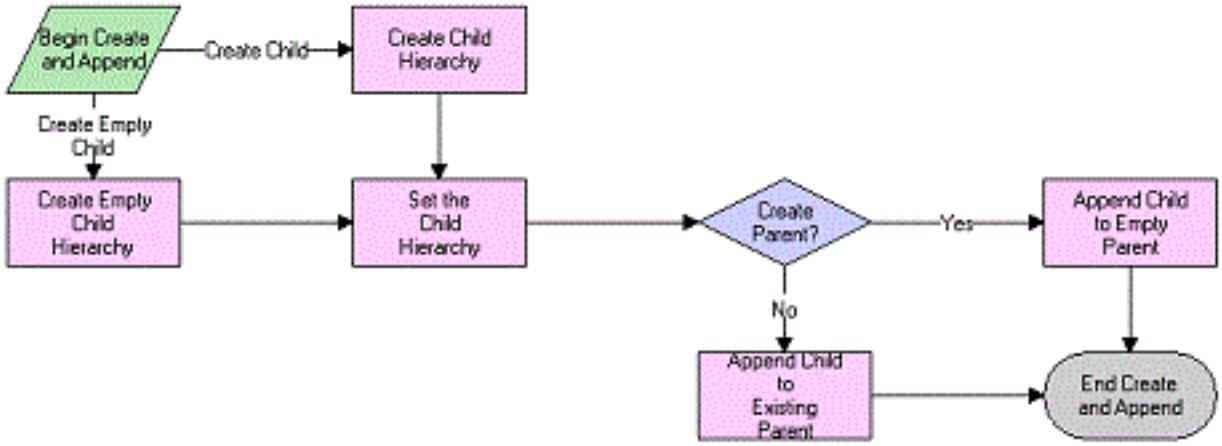


As shown in this diagram, the following events happen when this workflow is called:

- The early events gather and set data used in the message header as follows:
  - They set all of the key information first, including the internal key and key description. The external system uses this to reference a record in the Siebel database.
  - They also set the timestamps and status messages.
- The later events instantiate the header instance by creating an empty data structure based on the metadata provided by the integration object definition in Siebel Tools. They append all the data to the empty data structure.

Transfer Cart Outbound Create and Append Process Workflow

The Transfer Cart Outbound Create and Append Process workflow is shown in the following diagram.

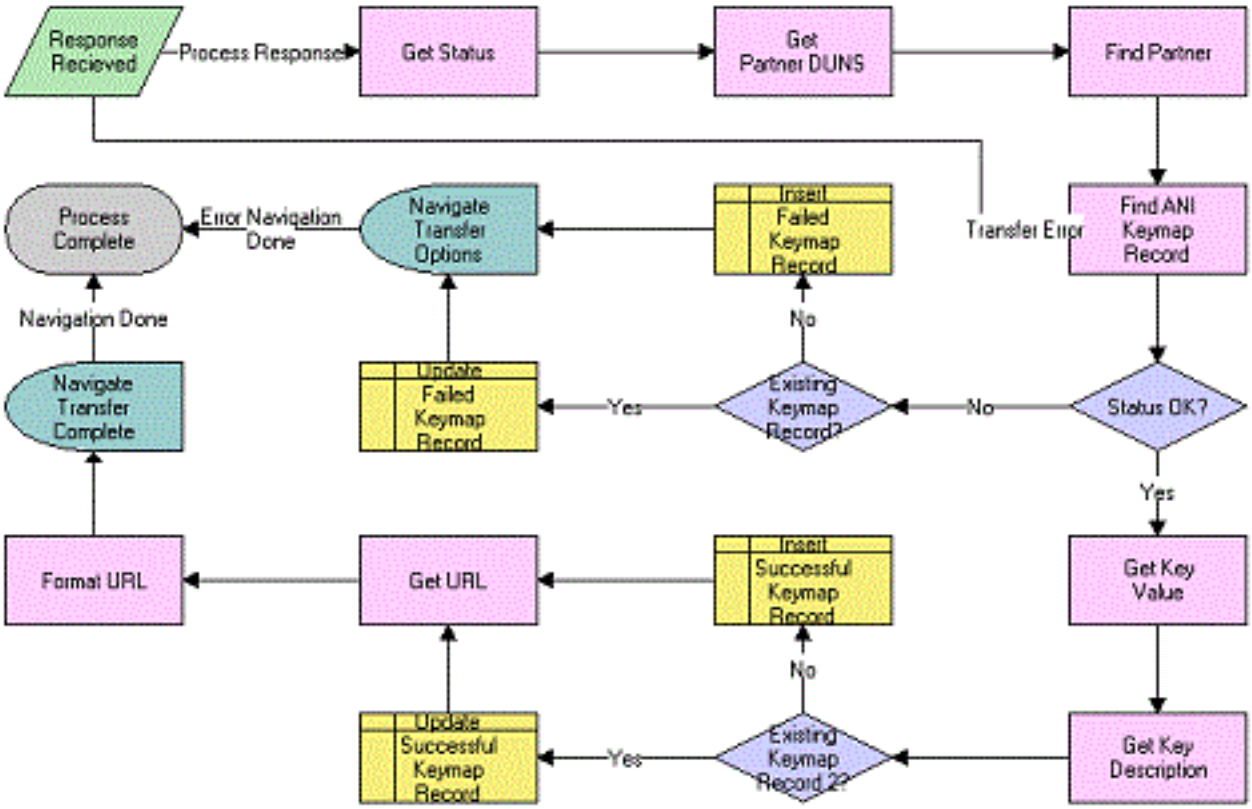


As shown in this diagram, the following events happen in this order when this workflow is called:

- The workflow creates the child hierarchy. If no business component reference is provided (empty Customer Account Data, for instance), it instantiates an empty instance of the child.
- The workflow appends the child instance to the parent object (usually this is the shopping cart object). If a flag is set, it can create an empty parent and append this child to it.

Transfer Cart Outbound Receive Acknowledgment Process Workflow

The Transfer Cart Outbound Receive Acknowledgment Process workflow is shown in the following diagram.

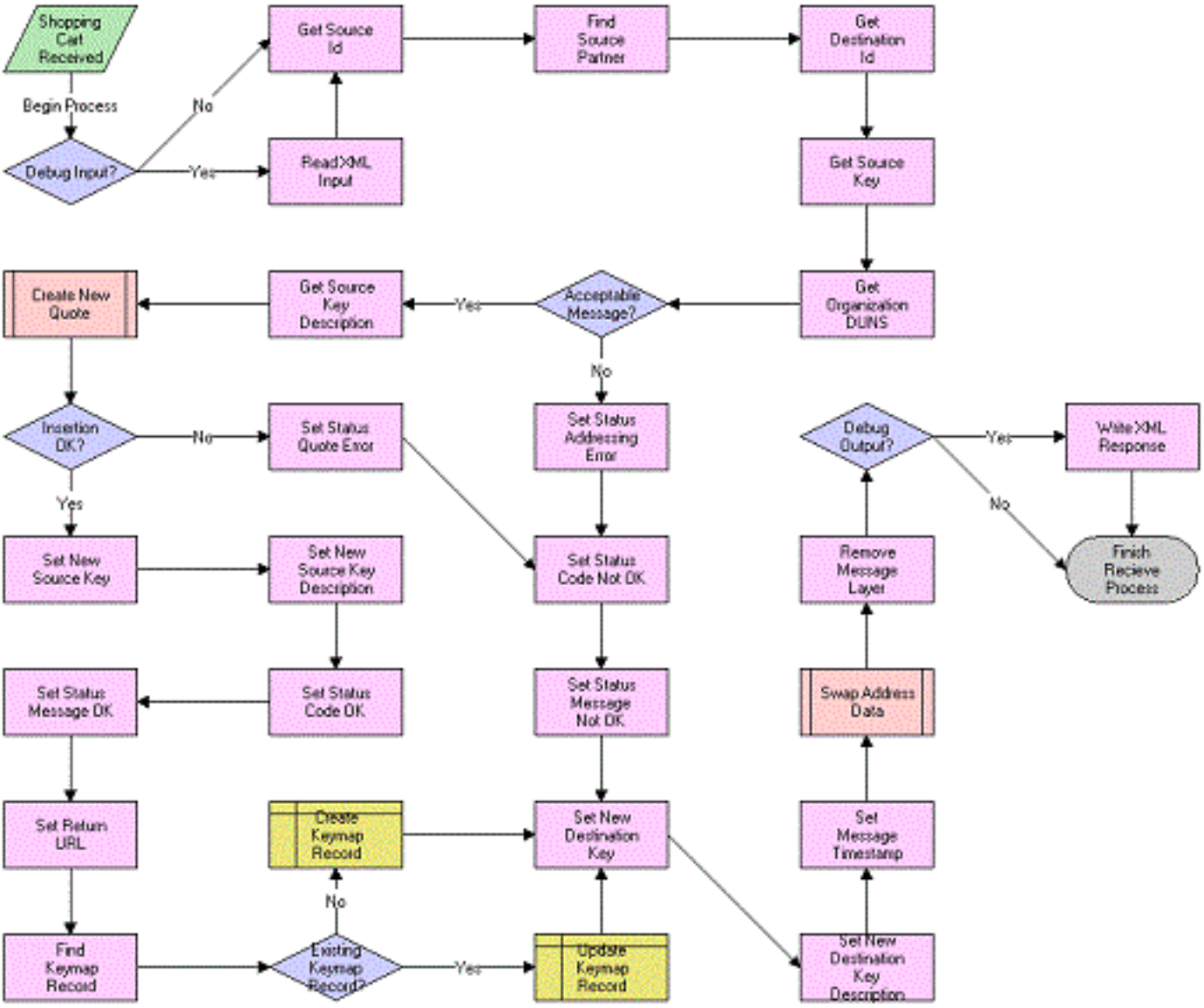


As shown in this diagram, the following events happen in this order when this workflow is called:

- The workflow gets the status of the message that has been received and looks for the partner it was received from.
- The workflow looks for an existing Keymap record that indicates whether to update it or create a new record. The Keymap data includes a record of the transferred information, including the time of the last transfer and the key used to reference the shopping cart's counterpart in the external system.
- If there is no error, the workflow creates or updates the keymap record and retrieves the URL information. Then, it renders the redirection view with the URL it has retrieved, using Virtual Fields.
- If there is an error, the workflow presents the customer with an option view that allows him or her to decide whether to choose another partner or cancel the transaction.

Transfer Cart Inbound Receive Process Workflow

The Transfer Cart Inbound Receive Process workflow is shown in the following diagram.



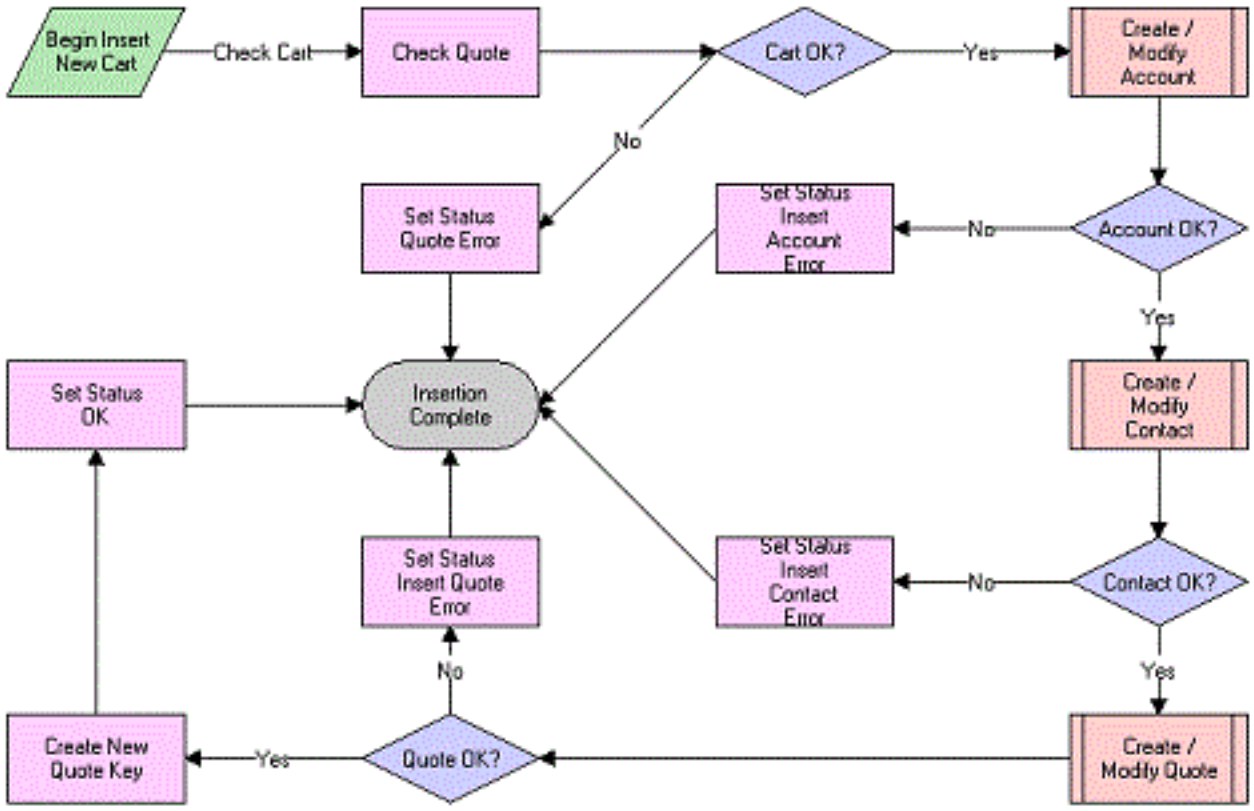
As shown in this diagram, the following events happen in this order when this workflow is called:

- The workflow makes sure that the sender is someone that is authorized to send requests.
- The workflow checks that the external system's key is present, and that the brand owner is the intended recipient.
- The workflow gets the key description and runs the Transfer Cart Inbound Create Cart Process.
- If an error is generated, the workflow reports it to the calling system and finishes the process. No Keymap record is created because the quote might not have been created.
- If no error is generated (OK status), the workflow does the following:
  - Updates the keys' statuses in the shopping cart message.
  - Creates the Keymap record.
  - Generates the URL needed to send to the calling system, so it can redirect the user to this system, with this shopping cart.

- Sets the timestamps and sends the message back to the caller.

Transfer Cart Inbound Create Cart Process Workflow

The Transfer Cart Inbound Create Cart Process workflow is shown in the following diagram.

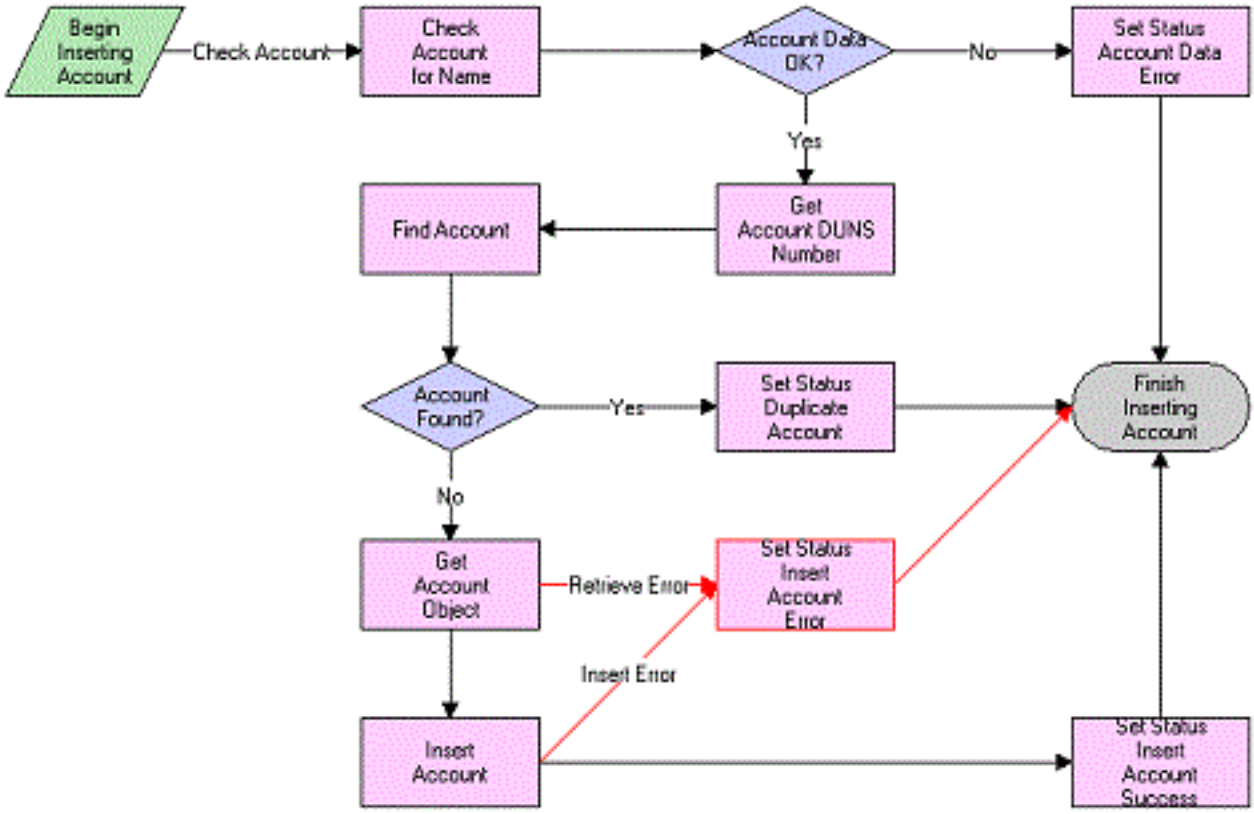


As shown in this diagram, the following events happen in this order when this workflow is called:

- Checks for the quote
- Inserts the customer account information
- Inserts the customer contact information
- Inserts the quote information and links it to the customer information

PRM ANI Inbound Create Account Process Workflow

The PRM ANI Inbound Create Account Process workflow is shown in the following diagram.

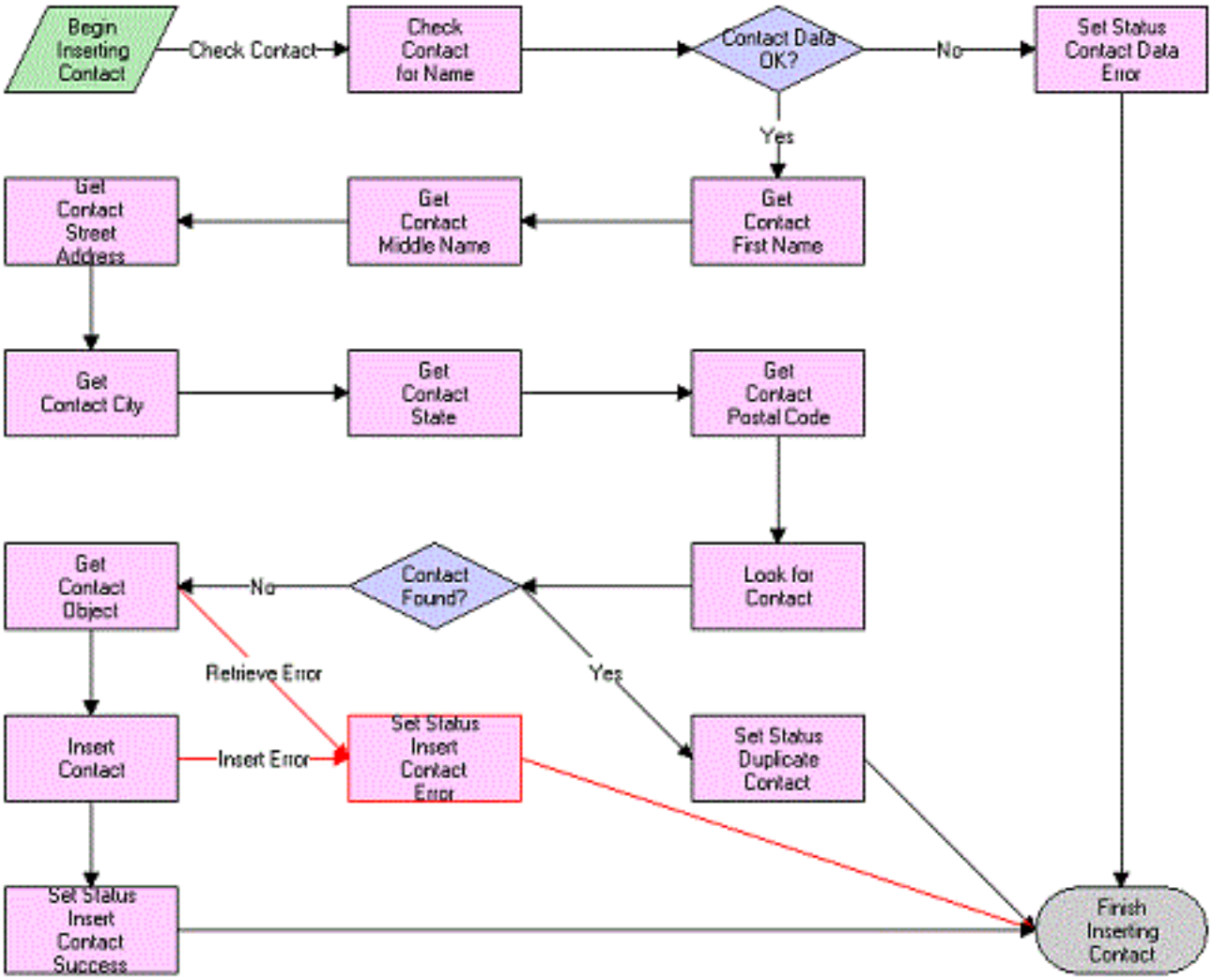


As shown in this diagram, the following events happen in this order when this workflow is called:

- Checks to see if the Account Name and D-U-N-S number are viable
- Looks in the Siebel database for an account with the same D-U-N-S number. This number is the Siebel method of uniquely identifying an account or partner.
    - If the account is found, reports the record's ID
    - If the account is not found, creates a new account

Transfer Cart Inbound Create Contact Process Workflow

The Transfer Cart Inbound Create Contact Process workflow is shown in the following diagram.

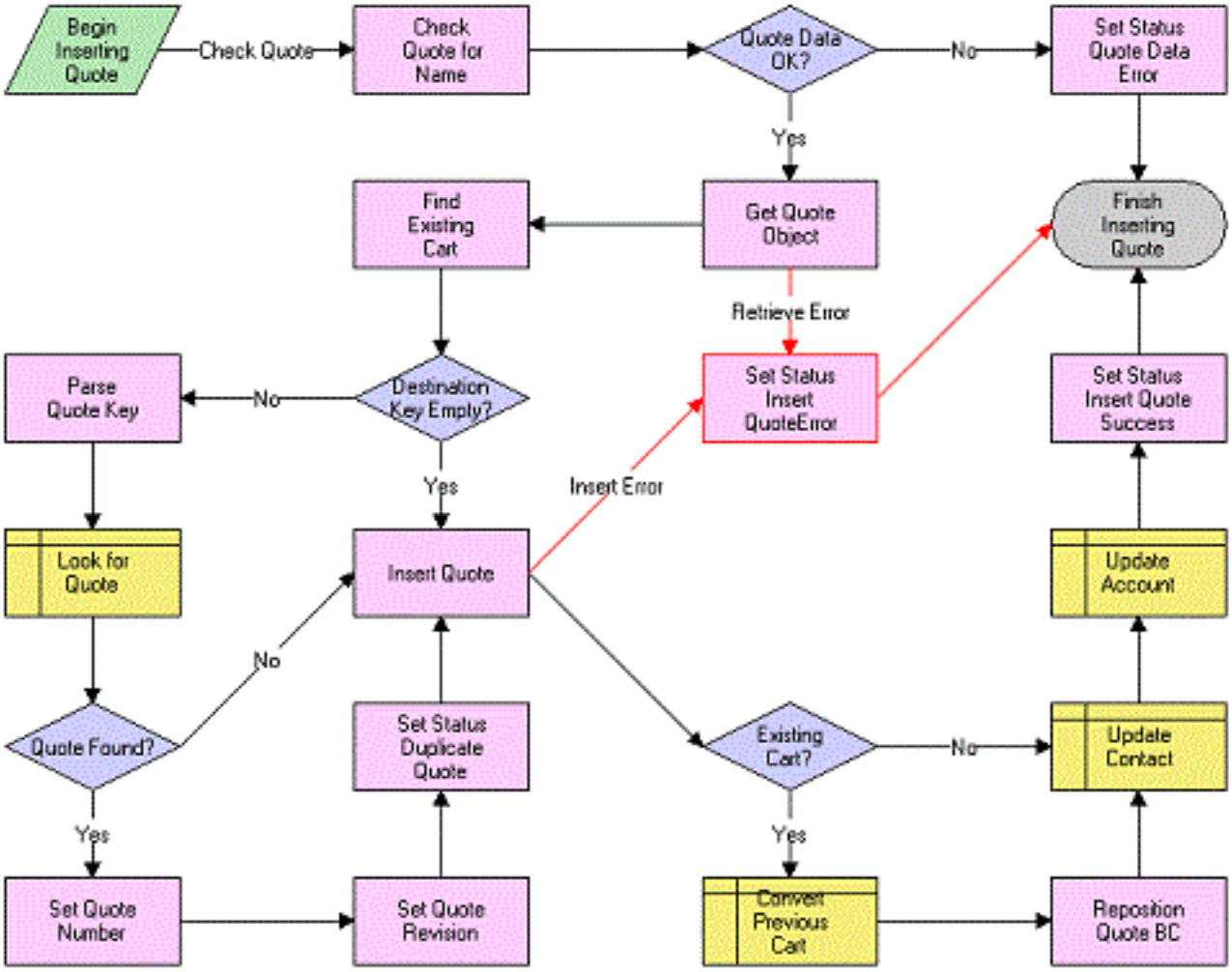


As shown in this diagram, the following events happen in this order when this workflow is called:

- Checks for the presence and viability of data
  - If data is not present, it assumes that the contact is anonymous
  - If the data is not viable, it returns an error
- Creates a user key for the contact similar to the user key acceptable for most credit card transactions, which is the combination of first name, last name, street address, city, state, and postal code
- Extracts customer information from the data structure, and then uses the key to query for the contact
  - If a duplicate is found, it is reported
  - If a duplicate is not found, it attempts to insert the contact into the contact table

Transfer Cart Inbound Create Quote Process Workflow

The Transfer Cart Inbound Create Quote Process workflow is shown in the following diagram.

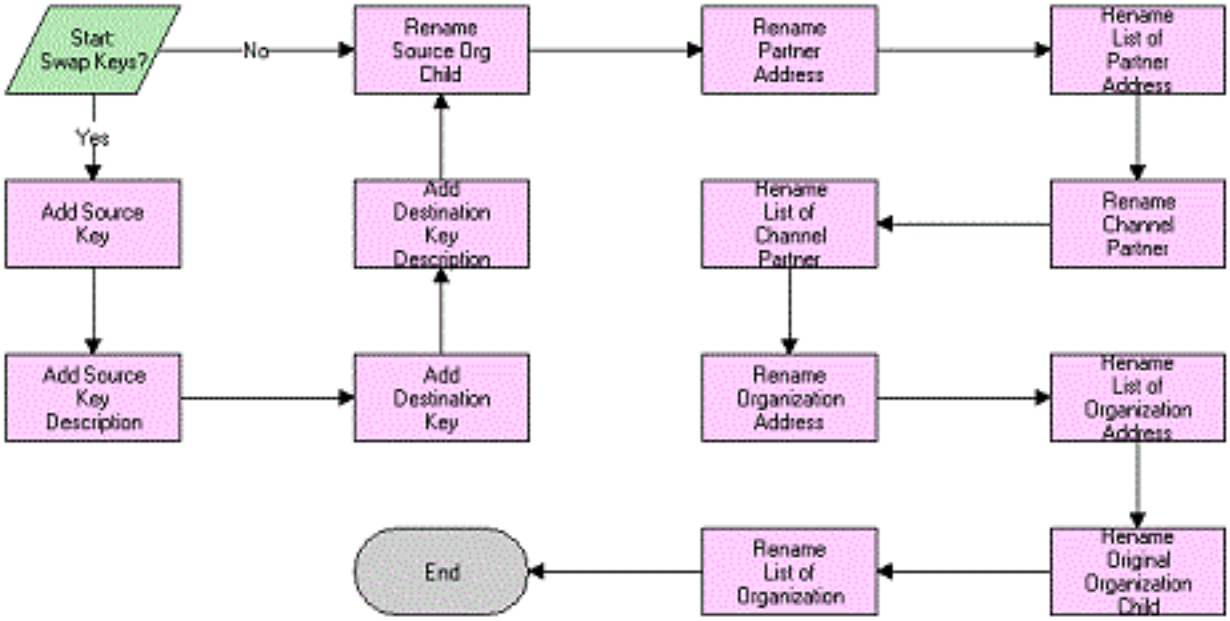


As shown in this diagram, the following events happen when this workflow is called:

- The unique identifier for the quote is the Destination Key. The key is provided by the source system to reference objects on the external system. If this is the first request for a transfer of this cart, the value of the key is empty. Then, the workflow creates the cart and generates a new key for the Quote record.
- If this cart has been transferred before, then the key contains data that is used to locate the existing cart on the destination system. The workflow updates this cart data.
- Finally, the quote is attached to the correct Contact and Account Records (the customer data).

PRM ANI Inbound Addressing Change Process Workflow

The PRM ANI Inbound Addressing Change Process workflow is shown in the following diagram.



As shown in this diagram, the following events happen when this workflow is called:

- The first events take the information about the system keys, internal and external, and use it to judge whether to swap the source organization and destination channel partner information in the message.
- If the key manipulation is handled elsewhere, the remaining steps are ignored.
- If the key manipulation is not handled elsewhere, the next events swap the source organization and destination channel partner data as follows:
    - Because the fields (including the addresses) are the same, the names of the components are altered. For example, Channel Partner Address becomes Organization Address. No data is actually moved.
    - The hierarchy component names are kept in process properties to allow for greater flexibility. If an integration component is renamed, a small change in the process properties is all that is needed.

Business Services Used by Siebel PRM ASIs

A set of business services named PRM ANI Utility Services have been created to support both opportunity transfers and shopping cart transfers.

Most of these service methods deal with the manipulation of integration objects, and rely on the Siebel Adapter Service on the internal side. Whenever possible, follow usage examples from the workflows provided.

You can use the PRM ANI Utility Services in situations where there is only one instance of a component type in the hierarchy path. So if there are multiple instances of a contact under the opportunity, you cannot get the Contact element from the integration object because each hierarchy path provided (Account.Contact here) must be unique. If this constraint must be violated, then refer to each instance with a separate Integration Component Name. For example, if *Person* had the same type of data as *Contact*, then use a reference to *Account.Person* to store another contact.

Conventions for Hierarchy Paths

The following convention is used for hierarchy paths in a number of service methods:

Hierarchy paths are inputs of the form *IC1.IC2.IC3…*, where IC1, IC2, IC3, and so on, are Integration Component Names that tell the method how to traverse the object definition to find the correct place to put the child. For example, when placing a business address under the account under the opportunity object, the path would read Opportunity.Account.

For the Set Child Type method, a slightly different methodology in the hierarchy path is used, as follows:

For Set Child Type, refer to IC1, IC2, IC3, and so on as the actual structure of the Siebel hierarchy. The examples listed come from the ANI Shopping Cart Message (PRM ANI) Integration object.

The first three substrings appear as follows: ChildObject.ListOfMessageType.RootComponentName. An example is:

```
SiebelMessage.ListOfANI Shopping Cart Message (PRM ANI).Message Details
```

The following substrings alternate between *ListOf* Component Names and the Component Names themselves. An example is:

```
ListOfChannel Partner.Channel Partner.ListOfChannel Partner Business
Address.Channel Partner Business Address
```

Methods of the PRM ANI Utility Services

The following methods are included in the PRM ANI Utility Services:

- *Append Hierarchy Method*
- *Create Empty Hierarchy Method*
- *Generate Key Method*
- *Get Child Type Method*
- *Get Hierarchy Value Method*
- *Get System Preference Method*
- *Isolate Integration ID Method*
- *Load Child Hierarchy Method*
- *Parse Key Method*
- *Query Business Component Method*
- *Detach Hierarchy Method*
- *Set Child Type Method*
- *Set Hierarchy Value Method*

Append Hierarchy Method

This method appends a child integration object to a parent integration object. The parent object must contain the child object's full definition.

See the notes about calls to the Load Child Hierarchy method. There is a dependency in calls to Append Hierarchy on calls to Load Child Hierarchy, so the Load Child Hierarchy method must be called before calling this method.

The following are inputs for Append Hierarchy:

- **Hierarchy Path - String.** This is used to denote where to append the child to the parent.
- **SiebelMessage - Hierarchy.** This is used to store the parent hierarchy's integration object data.

Append Hierarchy has only one output:

- **SiebelMessage - Hierarchy.** This is the resulting object instance with the child attached to the parent in the correct place on the data structure.

Example: Transfer Cart Outbound Create Header Process, Append Header to Message

Create Empty Hierarchy Method

This method creates an empty integration object instance with the same structure as a normal integration object but with two notes. All data fields are present and empty (initialized to empty string).

Each component in the definition of the integration object is instantiated once only in the exact structure that is prescribed by the definition.

The following are inputs for Create Empty Hierarchy:

- **Hierarchy Name - String.** This provides the name of the integration object to instantiate.
- **Message Id - String.** (Optional) This provides the Message ID that is used to identify this specific integration object instance. If this is not provided, a new one is calculated.

Create Empty Hierarchy has only one output:

- **SiebelMessage - Hierarchy.** This returns the integration object instance with the empty Component fields.

Example: Transfer Cart Outbound Create Header Process, Create Header Instance

Generate Key Method

This method returns a string that you can use to uniquely identify a record in the service's business component. For Workflow Processes, it refers to the primary business component of the processes' business object.

Generate Key has only one input:

- **Key Description - String.** This is used to describe the form of the string to be generated.
- This input is in the form *[A].[B].[C]...* where A, B, C... are names of fields that correspond to a unique key in your database.

- For instance, when using Contact, *[Last Name].[First Name]* would generate an insufficient value. However, *[Id]. [Last Name]* would work because [Id] itself is guaranteed unique in this system.

Generate Key has only one output:

- **Source Key - String.** This is used to identify the record in the service's business component.

Example: Transfer Cart Inbound Create Cart Process, Create New Quote Key

Get Child Type Method

This method reports the child type of a property set. For integration objects, this is generally of type SiebelMessage.

Get Child Type has only one input:

- **SiebelMessage - Hierarchy.** These are hierarchy children that are examined.

Get Child Type has only one output:

- **Child XX - String.** (Optional) The outputs have names numbering from 0 to n-1 where n is the number of children in the input Siebel Message.

  For example, if there are two children, the output property names are *Child 0* and *Child 1.* The output values are the names of the Child Types.

Get Hierarchy Value Method

This method returns a string field value in the integration object structure.

The following are inputs for Get Hierarchy Value:

- **Hierarchy Path - String.** This is the path to the IC parent of the field. Note that this path does not include the field name.
- **Property Name - String.** This is the name of the field to read.
- **Siebel Message - Hierarchy.** This is the integration object you are looking into.
- **ReturnBlankIfNull - String.** (Optional) This allows the returned value to be blank, instead of returning an error if the field is not found in the hierarchy.

Get Hierarchy Value has only one output:

- **Property Value - String.** This is the value of the field the brand owner is examining.

Example: Transfer Cart Inbound Create Contact Process, Get Contact Street Address

Get System Preference Method

This method looks up values in the system preferences.

Get System Preference has only one input:

- **System Preference Name - String.** The name of the system preference to look for.

Get System Preference has only one output:

- **System Preference Value - String.** The value of the system preference.

Example: Transfer Cart Outbound Request Process, Get Organization DUNS

Isolate Integration ID Method

This method strips an integration object instance of everything except for the Integration ID, including child components.

This method is not called by PRM ASIs, but is referenced by other ASIs. It is used to direct Siebel Adapter Operations to consider only the Integration ID to look for a record in some situations.

Isolate Integration ID has only one input:

- **Siebel Message - Hierarchy.** This contains the object to be stripped through.

Isolate Integration ID has only one output:

- **Siebel Message - Hierarchy.** This is the object that is returned. The only field that contains any data is the Integration Id.

Load Child Hierarchy Method

This method places a child hierarchy in memory to be used at a later time. It is used for operations that require two hierarchy type operands, such as Append Property Set.

Load Child Hierarchy has only one input:

- **Siebel Message - Hierarchy.** This is the message you want to load that will be operated upon later.

There are no outputs.

Example: Transfer Cart Outbound Create and Append Process, Set the Child Hierarchy

Parse Key Method

This method generates a search specification from a given key and key description. The search specification can be fed into a query step (Siebel operation or otherwise) to look for the record that the key has specified.

The following are inputs for Parse Key:

- **Key Description - String.** This is a description of the key following the format described in *Generate Key Method*.
- **Source Key - String.** Along with the description, this defines the record you want to view.

Parse Key has only one output:

- **Search Spec - String.** This is the search specification used to execute the primary business component. Only one record is in this record set because it is unique.

Example: Transfer Cart Inbound Create Quote Process, Parse Quote Key

Query Business Component Method

This method provides a way to query any business component in the business object. This gives you a bit more flexibility than the standard Siebel operation query, because you can search the entire business component without regard to the links to the primary business component.

If both Search Spec and Query fields are provided, the Search Spec is chosen over the Query field arguments to execute the business component with. If neither is provided, then an error is returned.

The following are inputs for Query Business Component:

- **Business Component - String.** This is the name of the business component in the business object to query through.
- **Keep Context - String.** (Optional, defaults to Yes) This is a string defining whether to query with regard to the current state of the business object or if to instantiate a new business object to query with (outside of context).
- **Output Field - String.** (Optional) These are the values you want to have returned from the record. A number can be appended to the name so that more than one field can be retrieved.
- For instance, if you wanted a Name and Location, there would be the arguments *Output Field 1* and *Output Field 2* with *Name* and *Location* as their values. If there is more than one record with the search specification, you obtain values from the first record in the executed business component.
- **Query Field - String.** (Optional) These are the input values determining the search specification that is used on the business component.
- To use this argument correctly, you must append the name of the field to the argument name. The value of the field can be any Workflow Process-evaluated string. For instance, if you are looking for a record where [Account Id] = Process Property [Siebel Operation Object Id], you would have:
    - Argument Name: Query Field Account Id
    - Type: Process Property
    - Process Property: Siebel Operation Object Id
- **Search Spec - String.** (Optional) If the search specification is more easily formulated as a string, then you can choose to provide it here. The string can have the same format as any other search specification in Siebel Tools; also, you can also choose to have a Workflow Process-evaluated string as a possible input.
- The following are outputs for Query Business Component:
    - **Record Count - String.** This returns a string representation of the number of records found in the query, up to 100. If there are more than 100 records, it returns the value -1, indicating that there are too many records in the query.
    - **Output Fields - String.** These are fields that are returned in the query with the property name equal to the field name.
    - In the previous example, the two output arguments are named *Name* and *Location*. Their values would be those of the first record returned by the query.

  Example: PRM ANI Inbound Create Account Process, Find Account

Detach Hierarchy Method

This method is a complementary function to Append Hierarchy. It takes the specified integration object and extracts it from the parent object.

The following are inputs for Detach Hierarchy:

- **Child Hierarchy Name - String.** This is the name of the child hierarchy to instantiate from the parent data.
- **Hierarchy Path - String.** This specifies the path to trace to find the child root integration component.
- **Siebel Message - Hierarchy.** This specifies the parent from which the child object is extracted.

Detach Hierarchy has only one output:

- **SiebelMessage - Hierarchy.** The Child Object Instance defined by The Child Hierarchy Name, with data contributed from the input Siebel Message.

Example: PRM ANI Inbound Create Account Process, Get Account Object

Set Child Type Method

This method is a complementary function to Get Child Type. It sets the hierarchy type if you need to change something to the type Siebel Message.

The following inputs are for Set Child Type:

- **Siebel Message - Hierarchy.** The string name of the actual child type that is being passed from the external Web service's hierarchy response. (The input argument's type is Process Property, and the property name picks the hierarchy property.)
- **Child Type - String.** (Optional) This lists the current child types, their values, and the values to which you want to change them. For instance, if a user wanted to change a child of type *Account* to a child of type *Partner*, the user would need to specify the following:
  - Argument Name: Child Type: Account
  - Argument Value: Partner
- **Hierarchy Path - String.** (Optional). This tells the method where to do its work. For more information about the structure of this string, see *Conventions for Hierarchy Paths*.

Set Child Type has only one output:

- **Siebel Message - Hierarchy.** This is the existing object with the child type changed.

Example: Transfer Cart Outbound Request Process, Rename Root Object 1

Set Hierarchy Value Method

This method is a complementary function to Get Hierarchy Value. It sets the value of a property in an object.

The following are inputs for Set Hierarchy Value:

- **Hierarchy Path - String.** This specifies the integration component path to the field.
- **Property Name - String.** This is the name of the property you want to set.
- **Property Value - String.** This is the value for which you want to set the property.
- **Siebel Message - Hierarchy.** This is the object that you want to have this new field. If there is a problem with the path (a component in the path cannot be found), an error is returned.

Set Hierarchy Value has only one output:

- **Siebel Message - Hierarchy.** This is the object with the hierarchy value set correctly.

Example: Transfer Cart Outbound Create Header Process, Set Message Time Stamp

5 Working with New Partners

Working with New Partners

This chapter covers how to add new partners to Siebel PRM. It includes the following topics:

- *About Partner Registration and Enrollment*
- *The Siebel PRM Portal Home Page*
- *Providing Information for Public Users of Siebel PRM*
- *Setting Up a Partner Company Identifier*
- *About Applying for User IDs*
- *About Enrolling New Partner Companies*
- *Process of Enrolling a New Partner Company*
- *Delegated Administration for Partners*

About Partner Registration and Enrollment

Siebel PRM enables new partner recruitment by allowing public users to view the Siebel PRM Portal Web site and to register as either individuals or companies. If a prospective partner registers as a company, the brand owner can decide whether to form a partnership with that company.

There are three levels of access to the Siebel PRM Portal:

- **Public Users (also called Anonymous Users).** Any user can view the Siebel PRM Portal home page without registering or providing any information. Public users can read company news and find out about the partner programs that are available. They can also view product offers that are available to the general public (not just to partners), and view literature in the Info Center. The public user home page also includes a login area for registered partners and a link to the registration page for visitors who want to register as partners.
- **Individual Partners (also called Self-Registered Users).** Users who register as individual partners might be consultants who want to get detailed information about your products to recommend them to clients. After providing information about themselves, users are automatically enrolled as individual partners. They can then use the Siebel PRM Portal to purchase products for themselves, participate in auctions, browse and sign up for training courses, view literature, and view special offers. They cannot share opportunities, service requests, activities, or any other transactional or service data through the Siebel PRM Portal.
- **Company Partners (also called Registered Users).** Companies that want to work in an active partnership with your company register in your company's partner program. They use the Siebel PRM Portal to provide detailed information about their companies. Your partner manager evaluates this information, decides how your company can work with their company, and decides whether to approve them as partners. Before they are approved as partners, they can view the same information as individual partners. After they are approved as partners, they can view and share opportunities, service requests, and other transactional data with your company.

You can also add companies as partners that you have recruited in other ways, in addition to those that have applied through the Web site.

The Siebel PRM Portal Home Page

Siebel PRM uses one home page for public, individual and registered users. Views on the home page are hidden or displayed based on the user's login to personalize the home page for each different type of user.

When you create your home page, you must control which views and content are displayed to different types of users.

Personalization rules control whether views are hidden or displayed. Personalization is based either on global variables or on profile attributes, depending on whether the user is anonymous, self-registered or registered. For example, personalization uses a global variable to determine whether the user is anonymous.

Other personalization rules use profile attributes to determine whether the user has a position or not. For example, the Program Information view appears if the user is anonymous.

Other personalization rules used in the salutation can be based on many other profile attributes, such as the user's organization or geography. For more information about personalization, see *Siebel Personalization Administration Guide* .

Providing Information for Public Users of Siebel PRM

When public users come to the Siebel PRM Web site, they see the home page as personalized for public users. In addition to letting registered users log in, this page includes links to information about your partner programs that prospective partners can read without logging in.

You can customize and personalize this home page and the linked pages.

You can give public users visibility to master data, such as literature, FAQs, and product offers. You cannot give them visibility to transactional data, such as opportunities, service requests, or activities.

In the seed data distributed with Siebel PRM, public users have the Unregistered Partner Agent responsibility, and you can control what views they can see by adding or subtracting views to this responsibility.

You can set up catalogs for public users in the same way you would for partners. Catalogs that are visible to public users are also visible to self-registered users. Only Partner Catalogs appear on the Siebel PRM Portal; these are catalogs with the value *Partner* in the Type field. For more information about responsibilities, see *Siebel Security Guide* . For more information about setting up catalogs, see the topic *Assigning Master Data to the Partner Company*. For more information about customizing Siebel PRM, see *Using Siebel Tools* and *Siebel Personalization Administration Guide* .

Navigate to the Administration - Application screen and the then Navigation Links view to create records to display banners and icons on the home page of the Partner Portal.

Setting Up a Partner Company Identifier

The final step in enrolling a new partner company is to set up a partner company identifier. A company identifier must be a unique, alphanumeric code such as the Row #of the partner record.

When a user navigates to the Register for a User Id (for employees of existing partner companies only) link on the Siebel PRM Portal, the user is immediately prompted for the company identifier. The user cannot proceed without entering the company identifier.

The user's application appears in the Partner User Applications screen in Siebel PRM Manager. On that screen, the brand owner can view that application and click the Qualify button, which adds the partner to the User Assignments list view on the Administration - Partner screen, Registered Partners view.

Use the following procedure to set up a company identifier.

To set up a company identifier (brand owner)

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. Drill down on the company record and then navigate to the More Info view.
3. In the Company Identifier field, enter a unique alphanumeric code, such as Row #, if necessary.
    - To get the Row #, on the menu bar, click Help, then About Record.

> **Note:** When a new partner record is created, the company identifier defaults to the number converted from the *row id*, which you can overwrite. This unique identifier is validated across all partners. You can turn off this check by changing the user property Check Company Identifier Duplicates on BC Channel Partner to N.

On the PRM Portal, a registered user for that partner can find the company identifier and share it with other users who want to apply from that company.

Use the following procedure to find a company identifier.

To find the company identifier (partner)

1. Navigate to the User Profile screen, then the Company Profile view.
2. View the alphanumeric code in the Company Identifier field.

After the Siebel Business Application has been submitted, the brand owner can qualify it in the Partner User Application view.

Use the following procedure to qualify a user.

To qualify a user's application (brand owner)

1. Navigate to the Administration - Partner screen, then the Partner User Application view and select a partner user application record.

   New records have Pending Qualification in the Status field.
2. Click Qualify.

   The user record appears in the Registered Partner screen, User Assignments view.

   You now add responsibilities and a position to the user as described in *Adding User Assignments at the Partner Company*.

About Applying for User IDs

Any user who wants to register for a user ID must be a company or an employee of a partner company only; individual users cannot apply for a user ID.

Eligible users can apply in the following ways:

- *Registering for a User ID (Partner Employee)*
- *Applying for Partnership (Partner Company)*

Registering for a User ID (Partner Employee)

Use the following procedure to register for a user ID as an employee of an existing partner company.

To register as an employee of an existing partner company (partner)

1. On the Siebel PRM Portal home page, click the New User of an Existing Partner link.
2. Type in your company identifier code in the Company Identifier field.

   If you do not know the company identifier, you can look it up. For more information, see *Setting Up a Partner Company Identifier*.
3. Type in your personal information in the fields in the Personal Information form, and type in your contact information in the fields in the Contact Information form.
4. Read the Terms and Conditions page and click I Agree.

   A Thank You message appears and you are registered.

Applying for Partnership (Partner Company)

A company that wants to be a partner must register online on the Siebel PRM Portal.

Use the following procedure to apply for a partnership for your company.

To apply for partnership for your company (partner)

1. On the Siebel PRM Portal home page, click the New Partner link.
2. Complete the Partnership Application form.

   Click Next at the end of each page to continue.
3. Read the Terms and Conditions page and click I Agree, and then click Finish to complete the registration process.

   A Thank You message appears and you are registered.

Configuring the Individual Partner Homepage

When people who are registered as individual partners log in to Siebel PRM, they view the individual partner home page.

This page uses Siebel Personalization to greet individual partners by name, and it includes links to information such as products available to individual partners. You can customize this home page.

Controlling Individual Partners' Access to Data

Three factors determine what individual partners see when they use Siebel PRM:

- **Access Group.** You give your partners visibility to master data by associating this data with access groups.
- **Responsibility.** In Siebel Business Applications, the screens and views that users can see are determined by their responsibility. Siebel PRM has one responsibility for individual partners, which is called Self-Registered Partner Agent. Individual partners can see screens and views assigned to this responsibility.
- **Personalization.** In Siebel Business Applications, the views that users see and the data they see can be controlled using personalization, which determines what is visible to users based on global variables (such as the global variable that determines whether the user is anonymous) and based on many profile attributes, such as the user's organization, age, or geography.

To control individual partners' access to data, go through the following process:

- Assign other master data to individual partners.
- Optionally, control the screens and views individual partners can see.

Organization is not used to limit data that individual partners can see, because organizations are used primarily for transactional data, and individual partners do not have access to transactional data. Individual partners are entered as contacts in the brand owner company's default organization.

Assigning Master Data to Individual Partners

Siebel business Applications work with two types of data:

- **Master (or Referential) Data.** This is data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.
- **Transactional Data.** This is data that users can create, read, edit, and delete, such as opportunities, accounts, contacts, and service requests. It can be assigned to individuals, to groups of individuals (such as a sales team), or to organizations. You cannot share transactional data with individual partners, only with partner companies.

Individual partners cannot view transactional data, but you can allow them to view master data. It might be useful for individual partners to view master data such as price lists and literature they use when working with your products, data sheets and information on recommended practices for system integrators, product offers that you sell to partners and to the general public, and other types of master data, such as FAQs and solutions.

Public catalogs are visible to self-registered partners out of the box, if the catalog's Type field has the value *Partner*.

To use access control to make other master data visible to individual partners, add the individual partners to user lists, add these user lists to access groups, and associate the access groups with the appropriate categories. These can be categories that are also associated with partner companies, or they can be categories you create specifically for individual partners. For more information about assigning data to organizations and categories, see *Siebel Security Guide* . For more information on creating and assigning product offers, see *Siebel Marketing User Guide* . For more information on creating and assigning literature and other master data, see *Siebel Applications Administration Guide* .

The following procedure shows how to assign literature to individual partners. Assign other types of master data in the same way, but use the other views under the category, instead of the literature view.

To associate literature with a category (brand owner)

1. Navigate to the Administration - Catalog screen and click the appropriate catalog.

   A Categories list appears that shows the categories in that catalog.
2. Select the appropriate Category.
3. Navigate to the Literature view for this category, and add a new record.

   The Add Literature dialog box appears.
4. If necessary, use a query to find the literature you are looking for.
5. Select literature that you want to associate with the category, and click OK.

   The literature is associated with the category and is visible to individual partners.

Controlling the Screens Visible to Individual Partners

By default, individual partners can see selected views in these screens:

- Home
- User Profile
- Infocenter
- Offers
- Partner Locator
- Search
- Self-Service
- Auctions Lister Area
- Sales Catalog, Shopping Cart, Orders, and Saved Quotes
- Training

In the seed data, the responsibility for individual partners is Self-Registered Partner Agent. You can see the views available to individual partners by showing the views that are associated with this responsibility. You can also make views in other screens visible to individual partners by associating them with this responsibility.

If you want to add a new responsibility or add new views to an existing responsibility, talk to your system administrator. For more information about responsibilities, see *Siebel Security Guide* .

CAUTION: Do not give the Self-Registered Partner Agent responsibility visibility to views in screens such as Opportunities, Service Requests, Activities, or other screens that let you share transactional data with partners. Only partner companies must be able to view these screens.

Thanking Individual Partners for Registering

The sample data distributed with Siebel PRM uses workflows to automatically send email when new individual partners register to thank them for registering. This email works like a mail-merge letter; it is based on a form-letter template, and it is personalized using information that the partners filled out when they registered.

You must modify the form letter template included in the sample data to use your own company name. You might also want to modify it in other ways.

To modify the email template you must modify the workflow process. Ask your system administrator for details.

The name of the workflow is Prospect Registration eChannel.

About Enrolling New Partner Companies

Siebel PRM lets you share more sensitive information with partners with whom you have a formal business relationship. For example, if you have entered into a partnership with a company that resells your product, it is important to share information about accounts, opportunities, and activities with that partner. Siebel PRM lets you share this information with the partner's employees in the same way that you would your own employees. To provide access to this data, you give the partner employees login access to the Siebel PRM Portal.

To share information in this way, you must follow a series of steps that set up this partner company in your system. Typically, this process begins when the partner uses the Siebel PRM online registration to apply to be a part of your partner program. There are other ways that a partnership can be initiated, which are discussed in the topic *Other Ways of Adding Partner Records*.

The process of adding partners depends on the following data and structures that are put in place by your system administrator or channel operations manager when Siebel PRM is initially set up:

- The organization structure must be established so that you can place this new partner organization into the existing organization hierarchy.
- Partner responsibilities must exist in order to assign these responsibilities to the partner organization.
- Access groups must also have been created so that the new partner can be placed in the appropriate access groups and be given access to master data.

These steps are described in *Setting Up Siebel PRM*.

Process of Enrolling a New Partner Company

In some situations, you can add a partner company and skip the registration and the following steps. Skip the registration and the following steps only if the partner company is not using the Siebel PRM Portal. You can still work with the partner company record using the Siebel PRM Manager: the channel manager can view the company's records in the Partner screen and can also use the Siebel PRM Manager to request market development funds (MDFs) for the company. You display partners who are approved but not registered by navigating to the Administration - Partner screen and choosing the Approved Partners link. You display registered partners by navigating to the Administration - Partner screen and choosing the Registered Partners link.

To enroll a new partner company, you typically perform the following tasks:

1. Add the partner company by:
   a. *Displaying and Assessing Prospective Partner Companies*. View the Siebel Business Applications submitted on the Siebel PRM Portal by prospective partners. If a company applies to be a partner through your Siebel PRM Web site, it has entered the information you need for the partner record. After this application is submitted, it is visible in Prospective Partners List view. To view the Siebel Business Applications of prospective partners, Navigate to the Administration - Partner screen, then the Prospective Partners view.
   b. *Adding a Partner Record by Qualifying a Partner Company*. To qualify the partner, click Qualify. This moves the Siebel Business Application from the Prospective Partners list to the Qualified Partners List. The prospective partner is now a qualified partner.
   c. *Registering the Partner Company*. After qualifying a prospective partner, add it to the Registered Partner list by clicking Register. The partner is now a registered Partner. To view the registered partners, Navigate to the Administration - Partner screen, then the Registered Partners view.

   > **Note:** In some situations, you might add partner companies in other ways, described in *Other Ways of Adding Partner Records*.

2. *Assigning Responsibilities to the Partner Company*. Responsibilities control the views partners can see.
3. *Assigning Positions to the Partner Company*. You can define the positions for the partner company, or you can let a delegated administrator at the partner company define these positions.
4. *Assigning Master Data to the Partner Company*. You assign most master data by adding the partner company to one or more access groups. You also assign a price list to the partner company.
5. *Adding User Assignments at the Partner Company*. You can enter the users at the partner company yourself, or you can enter one user at the partner company as a delegated administrator, who can add other users and delegated administrators at the partner company. As part of adding user assignments, you can also create a User ID and password for each employee and associate the user with a position and responsibilities.
6. *Contacting the New Delegated Administrator*. You can set up a workflow to send email to the new delegated administrator after the partner company has been added.
7. *Adding Locations for the Partner Locator*. If you want the partner company to be visible in the Partner Locator, you must add locations or have the partner add its own locations, and you must publish locations.
8. *Completing the Partner Profile*. Optionally, you can complete the partner profile to make sure that it has the information you need and that it is accessible to the correct people in your company.

Displaying and Assessing Prospective Partner Companies

This task is a step in *Process of Enrolling a New Partner Company*.

When a company applies to be a partner, you need to assess how well it can work with your company before deciding whether to enroll it as a partner.

There are many things you can do when you assess a potential partner company. You begin by assessing the profile data entered when the company applied to be a part of the partner program. You might also want to do a credit check, talk to key people in the company, and do many other offline activities.

When a company applies at your Siebel PRM Portal to be a partner, the company fills out a partner profile, including detailed information about the potential partner company's business. You begin the enrollment process by examining this information to understand this company's business model and seeing how it might fit in with your business goals.

You use the Prospective Partners list to view the companies that have applied to become your partners, along with their profiles. This list includes companies and individuals that have registered as partners online.

To view prospective partners and their profiles (brand owner)

1. Navigate to the Administration - Partner screen, then the Prospective Partner view.
   The Prospective Partners list appears with a list of companies that have applied to be partners.
2. Select a partner company in the Prospective Partners list.
   The profile information about that company appears.

Adding a Partner Record by Qualifying a Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

If a partner company registered at your Web site wants to apply to be a partner, the first step is to qualify the partner company. Qualifying a partner company moves it from the Prospective Partners list to the Qualified Partners list.

To qualify a partner company

1. Navigate to the Administration - Partner screen, then the Prospective Partners view.
2. Select the prospective partner record that you want to qualify and click Qualify.
   The Prospective Partner record is converted to a Qualified Partner record, and appears in the Qualified Partners list.

In some situations, you can just qualify a partner company and skip the registration tasks. Skip the registration tasks only if the partner company is not using the Siebel PRM Portal, and you are using Siebel PRM only to keep track of the partner company, not to share information with it. You can still work with the partner company record using the Siebel PRM Manager; the channel manager can view the company's records in the Partner screen and can also use the Siebel PRM Manager to request market development funds (MDFs) for the company.

Registering the Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

For any method you choose to use to add a partner company record, you must register the partner company.

About Placing the Partner Company in the Organization Hierarchy

Siebel business Applications let you divide your business into organizations, which control visibility to data. For example, when users choose All Contacts, they display the contacts in their own organization.

While setting up Siebel PRM, your company's partner operations manager might have created a hierarchical organizational structure to organize your partner companies. For example, there might be a hierarchy that organizes partner companies based on the product they specialize in or the industry in which they work.

When you register a new company, you must place it in the organization hierarchy by choosing its parent organization. For example, if your hierarchy is based on industry, you must place the new partner organization under the organization for the appropriate industry.

You can also create a hierarchical structure with multiple organizations for the partner company itself. For example, if you assign opportunities to different regional divisions of a partner company, you can create an organization that

represents the entire partner company and organizations under it in the hierarchy that represent its regional divisions. Then, you can assign opportunities to organizations representing the regional divisions, and only the division you assigned the opportunity to is able to see it. For more information about setting up the organization hierarchy in Siebel PRM, see *Setting Up Siebel PRM*. For more information about using organizations to control visibility to data, see *Siebel Security Guide* .

About Specifying the Partner Manager for a Partner Company

If you are using market development funds (MDFs), you need to specify an employee in the partner manager field, so that fund requests are routed properly for approval. The employee selected in the partner manager field is the first to approve an MDF request.

If you are not using MDFs, you do not need to use the Partner Manager field. You can enter a sales team instead. You might want to use the Partner Manager field as well as the Sales Team field to indicate that one person has primary responsibility for the partner.

In any event, the employee selected in the Partner Manager field must also be on the sales team to have visibility to the record in My Partners view. The partner's record is displayed in My Partners view for members of the account team.

Note: The employee selected in the Partner Manager field does not automatically have visibility to the Partner Record in the My Partners view. The Sales Team field determines who has visibility to the partner record in the My Partners view. You can display the record in the Approved Partner list and, in the More Info form, add employees responsible for the partner to the sales team.

Registering the Partner Company

Select the Partner record and click Register to place the partner in the organization hierarchy and specify the Partner Manager field.

CAUTION: After you register the partner company, you cannot delete the partner organization. Be sure you want to create a new organization before clicking Register. Registering is necessary to create an Organization record for this partner company in addition to the Partner record that you have already created; the Siebel Business Application cannot work with the partner company unless there is an Organization record.

To register the partner company

1. Add a Partner record for the new partner company, using the method described in the topic *Adding a Partner Record by Qualifying a Partner Company*or one of the methods described in the topic *Other Ways of Adding Partner Records*.
2. In the Approved Partners view, with the new Partner record selected, click Register at the start of the Partners list.

   The Register Partner form appears.
3. Check the Organization box.

   Registering this partner company makes it an organization, so you can put it in your organization hierarchy.
4. Click the Single Select button for the Parent Division field.

   The Organization dialog box appears.
5. Choose the division that comes before this partner organization in the organization hierarchy, and click OK. If you leave the field blank, the current user's organization is the parent organization by default.
6. To specify the Partner Manager field:

a. Click the Single Select button for the Partner Manager field.

   The Pick Position dialog box appears, listing the positions and names of your employees.

b. In the Pick Position dialog box, choose the position and person who is the partner manager for this partner organization, and click OK.

   The login name of the person you selected is entered as the Partner Manager in the Register Partner form.

c. If you do not select an employee for this field, the current user is entered by default.

7. Click the Save button at the start of the Register Partner form.

   The partner company has been registered.

After enrolling and registering the new partner, add the company identifier to start processing user applications from the Administration - Partner screen, then the Partner User Applications view.

Assigning Responsibilities to the Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

Responsibilities specify which views users of Siebel Business Applications can access.

For example, you can create the responsibility Salesperson, which includes the My Opportunities view, the responsibility Sales Manager, which includes both My Opportunities and My Team's Opportunities views, and the responsibility Sales Director, which includes the My Opportunities, My Team's Opportunities views, and All Opportunities views.

If you are using delegated administration, assign one partner employee the Partner Operations Manager responsibility, which includes the views for delegated administration in the Siebel PRM Portal. The partner operations manager uses the delegated administration views to add other employees and assigns them responsibilities.

Partners cannot create their own responsibilities. They can choose only from the set of responsibilities that you give them access to. You must associate at least one responsibility with the partner organization, so the partner users have access to some views when they log in to the PRM Portal. Typically, you assign multiple responsibilities to the partner organization so that the delegated administrator can give different types of users different responsibilities, just as you would with your own employees. For more information about positions and responsibilities, see the topics on defining positions and on defining responsibilities in *Siebel Applications Administration Guide* .

Note: Before you can assign responsibilities to a partner company, your partner operations administrator must have created the appropriate responsibilities while setting up Siebel PRM, as described in *Setting Up Siebel PRM*.

To assign responsibilities to a partner company

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partners list, drill down on the name for the partner company to which you are assigning the responsibilities.
3. If necessary, navigate to the Responsibilities view.
4. In the Responsibilities list, add a new record.

   The Add Responsibilities dialog box appears.

5. Select the Responsibility record that you want to add, and click OK.

   The responsibility is added to the Responsibilities list.

Assigning Positions to the Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

Positions specify which data Siebel Business Applications users can see when they display one of the "My" views. For example, if a user displays the My Opportunities view, the user sees the opportunities that have that user's position on the sales team.

For this reason, most Siebel implementations give a different position to each employee. For example, Siebel implementations would generally use positions such as Salesperson-042233 and Salesperson-042234 to give each of their salespeople a unique position. Then, when salespeople display My Opportunities view, for example, they see only their opportunities, not the opportunities of other salespeople.

Because positions are used this way, you can assign data to new employees who replace other employees simply by giving them the positions of the employees they are replacing (such as Salesperson-042233) to give them visibility to the data they need.

If you are using delegated administration, which lets administrators at partner companies add employees at their company, you must create at least one position for the delegated administrator. You generally want the delegated administrators to create positions in addition to adding employees, because they generally must create a new position whenever they add a new employee.

If you are not using delegated administration, you must add positions for all partner employees. For more information about positions and responsibilities, see *Siebel Security Guide* .

To assign positions to a partner company

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partners list, drill down on the name for the partner company to which you are assigning the positions.
3. Navigate to the Positions view.
4. In the Positions list, add a new record.
5. Enter information in the Position form to create a new position.

Assigning Master Data to the Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

Siebel Business Applications include two different types of data, which you work with in different ways:

- **Transactional Data.** This is data that users can create, read, edit, and delete, such as opportunities, accounts, contacts, and service requests. It can be assigned to individuals, to groups of individuals (such as a sales team), or to organizations.
- **Master (or Referential) Data.** This is data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

The next step in adding a new partner company is to assign it the appropriate master data.

To assign most master data to partners, you use access groups. Before you can assign master data in this way, your channel operations manager must set up the appropriate access groups and categories of master data, as described in *Setting Up Siebel PRM* Then, any partner company that you add to the access group has access to the master data visible to that access group.

Price lists are the only type of master data that is not assigned using access groups, because price lists are usually assigned to smaller groups of partner companies than other forms of master data. For example, you might assign master data to an access group called resellers, but you might have a different price list for each reseller, or you might have a standard price list for most resellers but special price lists for five of your resellers. Assigning price lists to access groups would limit the utility of the access groups, because price lists often do not follow the same rules as other master data.

You might also want to assign some types of transactional data, such as customer accounts and contacts, to the new partner company. You assign other types of transactional data, such as opportunities and service requests, to the partner company after you start working with it.

Most often, the type of access groups that partners are assigned to Partner Communities, but they can be assigned to access groups of any type.

For information about assigning transactional data to partner companies, see *Sharing Data with Partners*.

To add a partner company to an access group

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partners list, drill down on the name for the partner company which you are adding to the access group.
3. Navigate to the Access Groups view.
4. In the Access Groups list, add a new record.

   The Add Access Groups dialog box appears.
5. Select the Access Groups to which you want to add the partner, and add a record.

Use the following procedure to assign a price list to a partner company.

To assign a price list to a partner company

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partners list, drill down on the name for the partner company to which you are assigning the price list.
3. Navigate to the Price Lists view.

   The Price Lists view appears.
4. In the Price Lists list, add a new record.

   The Add Price List dialog box appears.
5. Select the Price List record that you want to add and click OK.

   The price list is added to the Price Lists list.

Adding User Assignments at the Partner Company

This task is a step in *Process of Enrolling a New Partner Company*.

As the next step in adding a new partner company, use the User Assignments view to add partner employees as Siebel PRM users. You can also use this screen to update positions, responsibilities, and logins for existing users.

Partner users must be added as employees to be able to log in to the Siebel PRM Portal. The Employee check box must be selected in the User Assignments view. This check box is selected by default when a new user is added.

Siebel PRM lets you add two types of partner employees:

- **End Users.** You can add the employees in your partner company as end users.
- **Delegated Administrators.** You can designate one or more employees at the partner company as delegated administrators, who can then add new users at the partner company and assign them responsibilities you have created for this partner company. The delegated administrator can also perform routine maintenance tasks, such as modifying user records. A delegated administrator must have a responsibility that includes the views used for delegated administration. In the seed data, this responsibility is Partner Operations Manager.

Delegated administrators can also give employees at their company the responsibility of delegated administrators. Therefore, you can add the person who submitted the application for a partner company as a delegated administrator, and then that delegated administrator can add other employees at the partner company as delegated administrators, who actually enter the users.

After the delegated administrator has added partner employees, you can see them using the Siebel PRM Manager. For more information on adding users and delegated administrators, see *Setting Up Siebel PRM*.

Note: If you are using delegated administration, you must make at least one partner employee a delegated administrator. In the User Assignments view, edit the user's record and enter a position and responsibility for the user.

To display partner employees who are Siebel PRM users

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. Drill down on the name for the partner company whose employees you want to see.
3. Navigate to the User Assignments view.
4. The User Assignments view appears. The information in the following table is entered for the person who applied to be a partner and for any other partner employees who have been added.

Field	Description
Name fields	The first and last name and title (such as Mr. or Ms.).
Job Title	The user's job title.
Position	The user's position or positions.
Responsibility	The user's responsibility.
User ID and Password	The login name and password with which the user logs into the Siebel PRM Portal. Password is only accessible if LDAP has been set up. You might have to use the Column Displayed menu item to display these fields.

Field	Description
Time Zone	The user's time zone. You might have to use the Column Displayed menu item to display this fields.

Contacting the New Delegated Administrator

This task is a step in *Process of Enrolling a New Partner Company*.

Contact the delegated administrator at the new partner company to provide more details about next steps.

Tell the delegated administrator to use the Siebel PRM Portal to add new users, including new delegated administrators, and to add user assignments for the employees at the company who use the Siebel PRM Portal.

You can contact the new delegated administrator personally, or you can set up Siebel Business Process Designer to send the administrator email automatically when the company is added as a partner.

The sample data included with Siebel PRM includes a sample of this email and a sample of a workflow that sends it automatically after the new partner company is added. You can use these samples as the basis of your email and workflow.

The name of the workflow is Send Prospect Partner Application Status eMail (Siebel PRM). For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

Adding Locations for the Partner Locator

This task is a step in *Process of Enrolling a New Partner Company*.

If you want partners to be visible to other partners in the Partner Locator, add their locations and publish them to the Partner Locator. Alternatively, partners can add their own locations through the Siebel PRM Portal, and you can publish them.

The Partner Locator allows customers, partners, and brand owner employees to find partners who are near to their location and who have special expertise. For example, if customers want a specific service, they can go to your Web site and use the Partner Locator to find a list of partners near them who have expertise in that service. If one partner company wants to find other partners to work with it on an opportunity, it can find other partners with the expertise it needs.

The Partner Locator allows users to search for partner name, partner type, partner expertise, and satisfaction index. It also allows users to enter their own location and choose the distance from their location that they want to search. For example, they can search for partners within 50 miles of their location.

Because one partner company can have many locations, you or the partner company must enter all the locations that appear in the Partner Locator.

Partners can add locations under their Company Profile, available through the Profile link on the PRM Portal.

You must also select the Publish check box for a partner to publish all of that partner's locations to the Partner Locator. You can deselect this check box to remove all the partner's locations from the Partner Locator. For example, you might

want to remove a partner if you charge partners a fee to be listed in the Partner Locator and one partner company does not pay.

If this check box is not selected, the partner company is still visible to the brand owner in the Partner Locator of the Siebel PRM Manager, but it is not visible to other partner companies in the Partner Locator of the Siebel PRM Portal.

Note: When you publish a partner to the partner locator, you can only select an existing address. If you want to add a new address for the partner in the partner locator, you must add the new address in the Partners form in the Partners screen before you add the location.

To publish a partner to the Partner Locator and add locations

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner that you want to publish to the Partner Locator.
3. Navigate to the More Info view.
4. In the More Info form, select the Publish check box.
5. Navigate to the Locations view.
6. If the address of this location has not been entered, click the Multiple Select button of the address field in the Partners form (which appears before the Locations list), and use the dialog box to add the address.
7. In the Locations list, add a record for each of the partner's locations and enter the information in the following table.

Field	Description
Location Name	Enter a business name for this location.
Address	click the Multiple Select button and select the address of this location.
City	Entered when you select the address.
Zip Code	Entered when you select the address.
State	Entered when you select the address.
Country	Entered when you select the address.
Longitude	Calculated and entered by the Siebel CRM system when the record is saved.
Latitude	Calculated and entered by the Siebel CRM system when the record is saved.
Business Hours	Enter the business hours for this location.

Completing the Partner Profile

This task is a step in *Process of Enrolling a New Partner Company*.

Optionally, after completing the administrative tasks of adding a partner company, you can make additional entries in the partner profile to make sure that it has the information your company needs and that it is accessible to the correct people in your company.

You can:

- Enter the partner's competitors and existing partnerships.
- Enter the partnership profile.
- Give your employees access to the partner in the My Partners view.

Entering the Partner's Competitors and Existing Partnerships

Because it could be a security breach to expose the lists of a partner's competitors and existing partnerships during registration, these fields remain as text fields during the registration process, so they are not automatically entered in the Siebel database. To update these fields, you can select companies that match what your partner entered in the Partner Profile view during registration.

To enter the partner's competitors and existing partnerships

1. Navigate to the Partners screen, then the Partner List view, drill down on the name of the new partner company, and then navigate to the Profile view.
2. Navigate to the Partnership Application link.

   The information that the partner filled out in the profile appears.
3. Note the existing partners and competitors entered by your partner.
4. Navigate to the Partner Profile view.
5. On the Profile form, in the field Other Program Memberships, enter the companies that the partner specified as its existing partners. If the specified company does not exist on the account list, you might want to add an account to your account list for this company.
6. In the Partner's Competitors field, enter the companies the partner specified as its competitors. If the specified company does not exist on the account list, you might want to add an account to your account list for this company.

Entering the Partnership Profile

Siebel PRM includes two types of profiles:

- **Partner profile.** This profile describes the partner company.
- **Partnership profile.** This profile describes how your company works with the partner company.

The partner profile was entered when a company applied to be a partner or when you were evaluating the potential partner.

After you register a partner, you can enter the partnership profile. For more information about the partnership profile, see *Managing Your Partners*.

Giving Your Employees Access to the Partner in My Partners View

You can give access to this partner record to specific employees in your company, so this partner is included in the Partners list when they display My Partners view.

You make the partner company visible in an employee's My Partners view by adding that employee to the sales team for the partner company.

To add an employee to the partner's sales team

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, select the record for the partner company.
3. In the Partner form, click the Multiple Select button of the Sales Team field.

   The Sales Team Members dialog box appears.

   > **Note:** The Sales Team field links to a sales team multi-value group applet (not to an account team multi-value group applet).

4. Select an employee you want to add to the Sales Team and click OK. If necessary, click the New button to add employees to the Sales Team Members dialog box.

Other Ways of Adding Partner Records

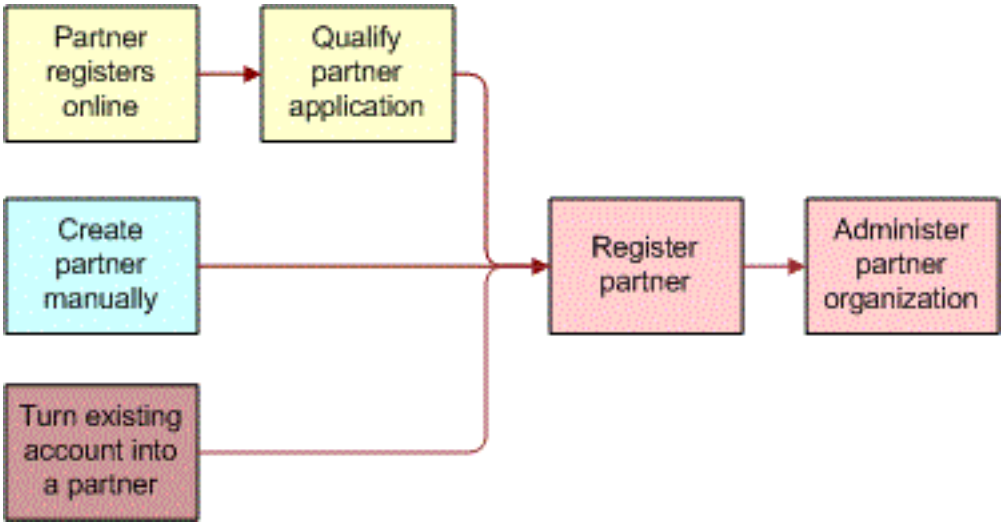
Because it is most common for partners to apply through your Web site, only this method of adding partners was described as the initial tasks of *Process of Enrolling a New Partner Company*.

However, you can add a partner record in three ways as shown in the following diagram:

- **Qualify and register a partner company.** If a company applied to be a partner through your Siebel PRM Web site, it has entered the information you need for the partner record. To add a partner record, click Qualify and then in the Partner List, click Register. This was described earlier.
- **Enter a partner company manually.** If a company became a partner without applying through your Siebel PRM Web site, you can enter it in the Partners list manually. When you first set up Siebel PRM, you enter records for your existing partners manually.
- **Convert a customer account to a partner.** If one of your customers also becomes a partner, you can add it to the Partners list by converting its Account record to a Partner record.

The following subtopics describe the other methods of adding a partner record, which are less common but also are useful.

After adding a new partner, you must go through the rest of the process of enrolling a new partner, as described previously. The process using the three methods of adding a new partner is shown in the following diagram.



Adding a New Partner Record Manually

If a company did not apply to be a partner at your Web site, add the new partner record manually. You can enter a partner manually in two ways:

- **Add a qualified partner manually.** If you have already qualified the partner company, you can enter it manually as a Qualified partner.
- **Add a prospective partner manually and promote it.** If you have not already qualified the partner company, you can enter it manually as a prospective partner. After it is qualified, you can promote it.

Adding a Qualified Partner Manually

If the partner has been qualified, enter the qualified partner record manually. Then, register the partner and enter the partner profile.

To add a qualified partner manually

1. Navigate to the Administration - Partner screen, then the Qualified Partners view.
2. In the Partners list, add a new record.

   Complete the fields (including More Info fields) for the new partner record as shown in the following table.

Field	Description
Name	Enter the name of the partner company.
Site	Enter a description of the physical location of the partner, such as "Headquarters" or "San Francisco."
Address, and so on	Enter the partner company's street address, city, state, ZIP code, and country.
Main Phone #	Enter the partner company's main phone number.

Field	Description
Main Fax #	Enter the partner company's main fax number.
Email	Enter the partner company's main email address.
URL	Enter the address of the partner's Web site.
Currency	Enter the currency the partner uses.
Partner Type	Optionally, click the Single Select button and use the dialog box to choose the type of partner you are adding. For example, aggregator, reseller, or service provider.
Partner Tier	Enter the partner tier. Companies might use tiers such as gold, silver, and bronze, or strategic, premier, and alliance.
Industries	Optionally, click the Multiple Select button, and in the dialog box, choose the industries to which this partner sells.
Territories	Optionally, click the Single Select button, and in the dialog box, choose the territories to which this partner sells.
Ranking	Optionally, enter information about how this partner is ranked against other partners in your partner program, which can help you keep track of your highest performing partners.
Stage	Use the picklist to choose the stage of the partner's application. Options are Active, Application Pending, Candidate, and Contract Pending.
Publish	Determines whether this partner is published in the Partner Locator module. If this flag is checked, then when users search for partners in Partner Locator, this partner is included in the possible result set.
Organization	Use this field to enter the partner's organization.
Sales Team	Select the sales team for the partner company. These are your employees who see this partner company's record in the My Partners view. The Sales Team field links to a sales team multi-value group applet (not to an account team multi-value group applet).
Price List	Select one or more price lists that this partner company uses.

Field	Description
Alias	Optionally, enter aliases for this partner company, names that the partner company might use in addition to its company name.
Currency	Select one or more currencies that this partner company uses.
Account Type	Select Partner as the account type.
Status	Select the account status: Active, Contract Pending, Marked for Deletion, or Inactive. You must select Active when adding a new record to be able to work with the partner.
Parent Account	Optionally, enter the parent company of the partner company.
Parent Account Site	Optionally, enter the site of parent company.

3. Click Register, and complete the process of adding the partner company, as described earlier in this chapter in *About Enrolling New Partner Companies*.

Adding a Prospective Partner Manually

If the partner has not yet been qualified, manually enter both the Prospective Partner record and partner profile. At some later time after the partner has been approved, click Qualify to move it to the Approved Partner list, and then complete the registration.

Before you add Prospective Partner records manually, you must make sure that the partner managers at your company who add Prospective Partner records have the value Self-Registered Partner Agent in their New Responsibility field. When these managers create new users, the new users inherit the responsibility in their New Responsibility field. When the prospective partners inherit the responsibility Self-Registered Partner Agent, the partners are able to log in to the Siebel PRM Portal as self-registered users in the interim, until they are qualified.

To enter the partner manager's new responsibility

1. Navigate to the Administration - User screen.
2. Use a query to find the employee whose new responsibility you want to enter.
3. In the form for this employee, in the New Responsibility field, choose Self-Registered Partner Agent.

To add a prospective partner manually

1. Navigate to the Administration - Partner screen, then the Prospective Partners view.
2. In the Prospective Partners list, add a new record.
3. Fill in the blank record and the form with the information about the new partner.
4. Navigate to the More Info view and enter the partner company profile and other information.
5. At some later time after the partner has been qualified, click Qualified to move it to the Qualified list and complete the registration process as described earlier in this chapter in *About Enrolling New Partner Companies*.

Converting a Customer Account to a Partner

You might find that one of your customers wants to become a partner. You can convert the customer's Account record to a Partner record.

To convert a customer account to a partner

1. Navigate to the Accounts screen, then the Accounts List view.
2. In the Accounts list, drill down on the customer account that you want to convert to a partner.
3. In the More Info view, select Partner from the Account Type list.
4. Click the Partner check box to select it.

   The account is converted to a partner and appears in the Partners screen, Approved Partners view, as well as in the Accounts screen.
5. Navigate to the Administration - Partner screen, then the Approved Partners view.
6. Click the Register button to complete the process of adding the partner company, as described in *About Enrolling New Partner Companies*.

Delegated Administration for Partners

Delegated administration allows partners to enter and maintain information about users and about their organizations, positions, responsibilities, and communication profiles, to reduce the administrative work that the brand owner must do.

Delegated administration also gives partners more flexibility to associate users with the appropriate organization, responsibility, and position, and to create or modify product catalogs and literature catalogs.

Partners have the ability to do the following:

- *Delegated User Administration for Partners*
- *Delegated Catalog Administration for Partners*
- *Delegated Communication Administration for Partners*

Delegated User Administration for Partners

When you register a new partner company, you create an organization for that partner company. You can also use the Administration - Group screen to create suborganizations under that partner organization. For more information, see *Setting Up the Organization Structure for Siebel PRM*.

When you create a partner company, you add at least one user and you add positions and responsibilities used by that company. For more information, see *About Enrolling New Partner Companies*.

Delegated administrators can reduce your administrative burden by adding and maintaining users at the partner company. To add a user, they must associate the user with one or more positions and one or more responsibilities.

Because responsibilities control which views a user can view, delegated administrators are not allowed to create new responsibilities. The delegated administrator can associate users with responsibilities that you created.

Delegated administrators can create new positions. In most implementations of Siebel Business Applications, each employee has a different position, so it is also necessary to create new positions when you add new employees. For more information about adding users, see *Adding User Assignments at the Partner Company*. For more information

about responsibilities, see *Assigning Responsibilities to the Partner Company*. For more information about positions, see *Assigning Positions to the Partner Company*.

A delegated administrator at a partner company can:

- Add and maintain users
- Add and maintain positions
- Associate users with organizations or suborganizations

For the partner to use suborganizations, the brand owner must create the suborganizations under that partner organization.

Adding Positions

Positions control which data users see in the My and My Teams views:

- In My views, users see the data for their own position. For example, in the My Opportunities view, users see all the opportunities where their position is on the sales team.
- In My Team views, managers see the data for their own position and for all of their reports. For example, in the My Team's Opportunities view, managers see all the opportunities where their position or their reports' positions are on the sales team.

When delegated administrators create new positions, they specify a name and a parent position for each position. The parent position is the position of the manager whose team this employee is on.

In most implementations of Siebel Business Applications, each employee has a different position. For example, rather than one position named Sales Representatives, there would be positions named Sales Representative 100, Sales Representative 101, and so on. Then in the My Opportunities view, sales representatives would only see opportunities where they are on the sales team; they would not see all opportunities where any sales representative is on the sales team.

Therefore, delegated administrators generally must add new positions for new users. The position must be added before the user is added.

To add a new position at the partner company (partner)

1. The partner delegated administrator navigates to the Administration screen, then the Organization Explorer view.
2. In the Organization Explorer, the partner clicks the arrow next to the organization to which the position is being added.

   Hyperlinks for Organizations, Positions, and Users appear under this organization.
3. The partner clicks the Positions link under the organization.
4. In the Positions list, the partner adds a new record and enters information about the new position.

Adding Users

In most implementations of Siebel Business Applications, each employee has a different position, as described in the previous topic. After you have added the position for the new user, you can add the record for the new user.

To add a new user at the partner company (partner)

1. The partner delegated administrator navigates to the Administration screen, then the Organization Explorer view.
2. In the Organization Explorer, the partner clicks the arrow next to the organization to which the user is being added.

Hyperlinks for Organizations, Positions, and Users appear under this organization.

3. The partner navigates to the Users link under the organization.

   The Users list appears.
4. In the Users list, the partner adds a new record and enters information about the new user (including position).

Giving Users Visibility to Different Organizations

When new users are added, the delegated administrator adds them to an organization, as described in the previous topic. The delegated administrator can also associate existing users with different organizations and suborganizations than the ones which with they were initially associated, thus changing the data that is visible to them.

Suborganizations can be used to control data visibility within the partner company. They are also important to partner collaboration. Partner collaboration allows partners to share information with organizations and suborganizations in other partner companies, and partners can associate employees with the appropriate suborganization so they can view the data they need.

The brand owner must set up this structure of suborganizations under the partner organization. For more information about organizations, see *Setting Up the Organization Structure for Siebel PRM*.

A user can be associated with more than one organization. If a user is already associated with an organization and the partner wants the user to be associated with a different organization, the partner must delete the user's existing position as well as add the position in the new organization. If the existing position is not deleted, the partner is still associated with the first organization as well as with the second.

The delegated administrator associates the user with the organization by giving the user a position in that organization. If the position does not already exist, then before performing the following procedure, the delegated administrator must create it as described.

Though the user has visibility to the data in the organization with which the position is associated, the delegated administrator still sees this user's name listed under the user's original organization.

To associate a user's position with an organization or suborganization (partner)

1. The partner delegated administrator navigates to the Administration screen, then the Organization Explorer view.
2. The partner clicks the arrow next to the organization or suborganization that the user is currently in.
3. The partner clicks the Users link under that organization.
4. In the Users list, the partner clicks the name of the user to be associated with an organization.

   The Users form appears, with information about that user.
5. The partner clicks the Multiple Select button for the Position field.

   The Positions Occupied dialog box appears.
6. The partner uses the arrows to move positions between the Available list and the Selected list, until only the desired positions are in the Selected list, and then clicks OK.

   The user can see the data visible to the organization with which this position is associated.

Delegated Catalog Administration for Partners

The partner-delegated administrator can add products or literature to catalogs.

Partners might do this for a number of reasons. For example, if a partner sells products that are complementary to the brand owner's products, the partner can add these to the product catalog and add literature about them to the literature catalog. Then, their product and literature catalog support the complete solution that they provide to customers.

Partners might also want to create their own catalogs and use them for selling products and managing literature.

The brand owner must create the catalog, even if it has no items in it. The partner can then add items to it.

The partner can see all the master data that the brand owner has associated with the catalog, but the partner can only add products and literature. For more information about creating catalogs, see *Assigning Master Data to the Partner Company*. For more information about pricing, see *Siebel Pricing Administration Guide* .

Adding Items to Catalogs

Delegated administrators can use the following procedure to add items to catalogs.

To add items to catalogs (partner)

1. The partner-delegated administrator navigates to the Administration - Catalog screen.
2. In the Catalogs list, the partner drills down on the name of the catalog to which items are being added.
3. In the Categories list, the partner does either of these actions:
    a. Selects an existing category to which the item is being added
    b. Adds a record and enters information about a new category to which the item is being added
4. The partner navigates to either the Products or the Literature view.
5. To add an existing product:
    a. The partner navigates to the Products view.
    b. In the Products list, the partner adds a new record.
    c. In the Add Internal Products dialog box, the partner queries to find an existing product, and navigates to Go.
    d. The partner selects the existing product to be added and clicks OK.
    e. The partner associates the product with a price list, as described in step 7.
6. To add a new product:
    a. The partner navigates to the Products view.
    b. In the Products list, the partner adds a new record.
    c. In the Add Internal Products dialog box, the partner clicks Go to run an empty query.
    d. In the Add Internal Products dialog box, the partner adds a new record and enters information about the product. navigates to New.
    e. The partner associates the product with a price list, as described in step 7.
7. To associate a product with a price list:
    a. After adding the product, the Partner clicks its name in the Product list.

       The Product form appears, with the Price Lists list.
    b. In the Price Lists list, the partner adds a new record.
    c. In the Add Price Lists dialog box, the partner selects a price list.
    d. In the Price Lists list, the partner enters a price for the product in the List Price field.
8. To add a new literature item:
    a. The partner navigates to the Literature view.

b. In the Literature list, the partner adds a new record.
c. In the name field of the new record, the partner selects the file that contains the literature.

Delegated Communication Administration for Partners

Delegated communication administration uses two screens, the Communication Administration screen and the Communication Profile view of the User Profile screen.

The Siebel PRM Portal's Communication Administration screen allows the delegated administrator to view communications drivers, such as the drivers used for email. Each driver has parameters that specify how it behaves. For example, the parameters for an email driver might allow the administrator to choose whether the message is in plain text, whether the From address is required, whether messages are deleted after being processed, and other parameters.

The drivers and parameters in Siebel PRM Portal.

After these drivers have been set up, the Siebel PRM Portal's User Profile screen allows the delegated administrator to associate drivers with partner employees, to specify which drivers each employee uses.

In the User Profile screen, the delegated administrator can also override the default parameters for individual users. For example, for an email driver, the parameter set in the Communication Administration screen might specify that all messages are plain text. In the User Profile screen, the administrator might override this for specific users to allow them to view HTML messages. For more information about communication administration, see *Siebel CTI Administration Guide* .

Setting Up Drivers and Parameters

Delegated administrators can use the following procedure to add or set up drivers and parameters.

To set up drivers and parameters (partner)

1. The partner-delegated administrator navigates to the Administration - Communication screen.
2. In the Driver list, the partner selects a driver.
3. In the Driver Parameters list, the partner modifies the parameters for that driver by specifying whether parameters are required and specifying the default value of parameters.

Associating a Driver with Partner Employees

Delegated administrators can use the following procedure to associate a driver with a partner employee.

To associate a driver with partner employees (partner)

1. The partner delegated administrator navigates to the User Profile screen, then the Communication Profile view.
2. In the Profiles list, the partner adds a new record.
3. In the Name field of the new record, the partner enters a user's name.
4. In the Driver field of the new record, the partner selects a driver.
5. Optionally, to override default parameters for that driver, in the Profile Parameter Overrides list, the partner selects names of parameters and enters new values for the parameters.

6 Working with Partner Programs

Working with Partner Programs

This chapter discusses how to set up and administer partner programs. It includes the following topics:

- *About Partner Programs*
- *Process of Setting Up Partner Programs*
- *Eligibility Administration for Partner Programs*
- *Applying to Partner Programs (Partner)*
- *Process of Reviewing Applications to Partner Programs*
- *Partner Program Administration*
- *Partner Program Workflows*

About Partner Programs

Brand owners can have multiple partner programs, each with its own requirements and processes. In Siebel PRM, partner programs allow brand owners to define each program's set of literature, terms and conditions, benefits, entitlements, and approval activities. Brand owners can also define characteristics such as activation date, expiration date, membership duration, and renewal period for each program.

Brand owners can group partner programs into tiers such as Silver, Gold, or Platinum. Brand owners can also create relationships between partner programs to define program prerequisites and addenda.

The brand owner sets up each partner program to allow partners to apply for membership. A partner program is a multi-organization enabled object that supports access control visibility.

Partner programs administration allows channel partners to apply for partner program membership on the PRM Portal. After the prospective partner has completed the application, a channel operations manager (brand owner) must review and approve or reject the application. If the application is approved, the channel operations manager then grant the new partner access to the program through the PRM Partner Portal.

Partner program management involves:

- **Setting Up Partner Programs.** The brand owner sets up a catalogue of partner programs so a partner can select programs from the PRM Portal.
- **Administering Partner Eligibility.** The brand owner defines the criteria that determine who can apply to a partner program. The brand owner also defines the criteria that determine who can be automatically approved.
- **Applying to the Partner Program.** The partner goes to the PRM Portal to apply for partner membership.
- **Approving Partner Applications.** The brand owner reviews the submitted application to verify the information and then approves or rejects it.
- **Administering Partner Programs.** The brand owner maintains and updates the partner program.

Process of Setting Up Partner Programs

There are four partner programs types: Authorization, Accreditation, Specialization and Program.

To set up a partner program, a brand owner performs the following tasks:

1. *Creating Partner Programs*
2. *Specifying Partner Program Approval Method*
3. *Associating Entitlements with Partner Programs*
4. *Setting Up Partner Program Applications*
5. *Adding Literature to Partner Programs*
6. *Setting Up Related Partner Programs*
7. *Setting Up Partner Program Tier Groups*
8. *Setting Up Partner Program Catalogs*
9. *Making Programs Visible to Partners*

Creating Partner Programs

The brand owner needs to create a record representing the partner program and to specify whether approval for this program is manual or depends on a eligibility list. This task is a step in *Process of Setting Up Partner Programs*.

To set up a partner program

1. Navigate to the Partner Programs, then the Program Design view.
2. In the Partner Programs list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Type	Select Program.
Available To All	Select this check box to make this program public (no eligibility rules).
Program End Date	Displays the date when the program ends.
Delegated Application	Select this check box to allow to apply on behalf of branch organization.
Auto Cascade	Select this check box to allow branch organizations to be automatically approved when the parent organization is approved. For example, if the Headquarters of a company is approved, the Western Branch, Eastern Branch and MidWest Branch are also approved.
Status	Displays the status of the partner program. When the program is first created, the status is Pending.

Field	Description
	Note: If you change the status of a partner program to Active, the record becomes Read-Only.

3. In the More Info form, complete the necessary fields. Some fields are described in the following table.

Field	Description
Renewal Period Begin (Days)	Enter the number of days before membership expires that the partner can apply to renew membership.
Renewal Period End (Days)	Enter the number of days after membership expires when the member can still apply to renew membership. This is a grace period after membership expires.
Membership Length (Months)	Enter the number of months that membership lasts. Use either this field or the Fixed Membership End Date field.
Fixed Membership End Date	Displays the date when membership expires. To remain members after this date, partners must apply to renew their membership. This date is calculated based on the membership length that was entered Membership Length field of the Partner Program Design, More Info view.

Note: After you create the Partner program record, Siebel Partner Manager automatically creates an access group with a name that is the combination of the partner program name and the organization name. Siebel Partner Manager automatically maintains this Access Group by adding or removing Access Group members based on the partners' membership status within that partner program. For more information on partner program membership, see *Partner Program Administration*.

Specifying Partner Program Approval Method

Partner program applications can be approved in three ways, depending on which of the following values is selected in the Approval Method field:

- **Approve All.** All applications are approved automatically without review.
- **Approval List.** Partners are approved based on an eligibility list. If you use this method, you must set up an eligibility list, as described in *Eligibility Administration for Partner Programs*.
- **Manual.** The brand owner reviews each application individually in the Application Inbox view and approves or rejects each application manually. If you use this method, you must review applications, as described in *Process of Reviewing Applications to Partner Programs*.

This task is a step in *Process of Setting Up Partner Programs*.

To specify partner program approval method

1. Navigate to the Partner Programs screen, then the Program Design view.
2. In the desired program, drill down on the program name.
3. In the More Info view, in the Approval Method field, select Approve All, Approval List, or Manual.

Associating Entitlements with Partner Programs

You can associate entitlements with one or more partner programs. For example, partners in a specific partner program might be entitled to one year of free technical support in using your product.

To associate an entitlement with a program, you must create an entitlement template and associate it with the partner program.

The entitlement associated with a partner program can be added to a partner's existing agreement either during the application approval process or after the partner's membership has been approved. If no agreement exists for the partner, the partner manager at the brand owner company can create one from the Partner Application or Partner Membership view.

When you create a partner program, the Siebel Business Application creates a Product record in the background, so it can associate entitlements with this product. The product has the same name as the partner program, and it has Partner Program selected in the Type field of the Product record. For more information about creating the entitlement template, see *Siebel Field Service Guide* .

This task is a step in *Process of Setting Up Partner Programs*.

To associate entitlement templates with a partner program

1. Navigate to the Partner Programs screen, then the Program Design view.
2. In the desired program, drill down on the program name.
3. Navigate to the Entitlement Templates view.
4. In the Entitlement Templates list, you can add one or more new records by selecting an entitlement template for each new record.

Setting Up Partner Program Applications

A partner program application is a form that the partner completes on the PRM Portal when applying to join a partner program.

Before you set up the application in Partner Manager, you must define the application in one of the following ways:

- **SmartScripts.** Each program can have one SmartScript initial application and one Smartscript renewal application. The actual design and administration of SmartScripts are performed in the SmartScript Administration screen. For more information on SmartScripts, see *Siebel SmartScript Administration Guide* .
- **External Applications.** Alternatively, the brand owner can create .asp or .jsp pages that render the initial and renewal applications.

For any given partner program application, you can specify either SmartScript applications or external applications, but not both.

This task is a step in *Process of Setting Up Partner Programs*.

To set up a partner program application

1. Navigate to Partner Programs screen, then the Application Design view.
2. In the Application Design form, complete the necessary fields. Some fields are described in the following table.

Field	Description
Initial Application	Select the SmartScript script you want to use in the initial application.
Renewal Application	Select the Smartscript you want to use in the renewal application.
Initial URL	Enter the URL for an external application you want to use as the initial application.
Renewal URL	Enter the URL for an external application you want to use as the renewal application.

Adding Literature to Partner Programs

Adding literature allows partners to download collateral, terms and conditions and other documents that detail the partner program. The partner can access this literature by drilling down on the partner program in the catalog on the PRM Portal.

This task is a step in *Process of Setting Up Partner Programs*.

To add literature to a partner program

1. Create the document to be used as literature in some external application.
2. Navigate to Administration - Document screen, then the Literature view, add a record to the Literature list, and select the document.
3. Navigate to Partner Programs screen, then the Program Design and drill down on the name of the partner program to which you want to add literature.
4. Navigate to the Literature view, add a record and select the literature.

Setting Up Related Partner Programs

Related programs are programs that have a relationship with a base partner program. There are two types of related programs:

- **Addenda.** These programs are is not in the original agreement. For example, a base program that authorizes partners to be resellers might have addenda programs for each product the partners can sell. After a partner is a member of the base program, that partner can apply for the addenda programs; if the partner tries to apply to addenda programs without being a member of the base program, an error message is displayed.

- **Prerequisite.** This relationship is informational only. You can enter information here to tell partners that program A is prerequisite to program B, but the Siebel Business Application does not enforce this logic. To enforce this prerequisite, you must also make program B an addendum to program A.

This task is a step in *Process of Setting Up Partner Programs*.

To set up an addenda program

1. Navigate to Partner Programs screen, then the Program Design view, and create a new program.

   This is the addenda program, and it is created like other partner programs.
2. In the Partner's Program list, drill down on the name of the base program to which you want to relate the addenda program.
3. Navigate to the Related Programs view, add a new record to the list.
   a. Select the addenda program you created.
   b. As the Relationship Type, select Addenda.

Setting Up Partner Program Tier Groups

A program tier group is a group of programs that are related, usually in a tier structure. An example of a tier group is a program that has three status groups, a Silver group, a Gold group and a Platinum group.

A partner who is currently in the Silver group, for example, can upgrade to the Gold group. Note that PRM enforces that the partner can only be a member of one group at a time. For example, once a partner upgrades to Gold, that partner cannot still be in the Silver group.

Note: Partner tier groups are not related to the Partner Tier multi-value field on the Partner Profile view.

This task is a step in *Process of Setting Up Partner Programs*.

To set up program tier group

1. Navigate to Partner Programs screen, then the Program Tier Group view.
2. In the Program Tier Groups list, add a new record and complete the necessary fields.

   The tiers you defined are available in Program Design, More Info view.

Use the following procedure to associate a program tier group with partner programs.

To associate a program tier group with partner programs

1. Navigate to the Partner Programs screen, then the Program Design view.
2. Drill down on the name of a partner program.
3. Make sure the Status field is set to pending, so you can make changes in the program.
4. In the More Info form, in the Program Tier Group field, select the program tier group.

Setting Up Partner Program Catalogs

You set up a partner program catalog so partners using the Partner Portal can view and choose among your available programs in this catalog.

For complete information about setting up catalogs, see *Siebel Order Management Guide* .

This task is a step in *Process of Setting Up Partner Programs* .

To set up a partner program catalog (brand owner)

1. Navigate to the Administration - Catalog screen.
2. In the Catalogs list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Catalog Type	Select Partner Program.
Private	If this catalog is to be private, select this check box. If the catalog is not private, all partners can see this catalog. If the catalog is private, you can control which partners can see the catalog.

3. If the catalog is private, you must add the partners to access groups to allow them to view the partner programs in the catalog:
   a. Drill down on the Catalog, navigate to the Access Groups view, and add one or more access groups for this catalog.
   b. Add the partner organization to the access group. For more information, see *Siebel Security Guide* .
4. Navigate to the Categories view, and add a category.
5. In the Category form, click the Partner Program link.

   If the link is not in view, click the arrow after the links to see more options.
6. In the Partner Program view, add a new record to add Partner Programs to Categories.

Making Programs Visible to Partners

Only partner programs with the status Active are visible to partners on the PRM Portal.

If the catalog/category is marked as Private, the partner must be added into the access group. For more information, see *Setting Up Partner Program Catalogs*.

If the program is not checked as Available to All, the partner has to be added to the Eligible Partners list to be able to see the program on the PRM portal. For more information, see *Eligibility Administration for Partner Programs*.

To make a partner program visible to partners

1. Navigate to the Partner Programs screen, then the Program Design view.
2. In the Status field of the desired Partner Program record, select Active.

Eligibility Administration for Partner Programs

A partner program can have lists of eligibility attributes that determine what partners can apply to it or renew a membership. The brand owner can use automated rules, lists of partner companies, or manually enter data to determine partner eligibility.

This only applies to programs whose approval method is approval list. For more information, see *Specifying Partner Program Approval Method*.

An eligibility list for a partner program can be created by entering data manually or using Oracle Business Intelligence.

Eligibility administration is covered in the following topics:

- *Creating a Partner Programs Eligibility List Manually*
- *Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load*

Creating a Partner Programs Eligibility List Manually

To create an eligibility list manually, you enter information about each partner program to generate a picklist. Note that this method might not be practical for a long list of partner programs. If you have a lot of partner programs, see *Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load*

Use the following procedure to create an eligibility list manually.

To create an eligibility list manually (brand owner)

1. Navigate to the Partner Programs screen, then the Membership Administration view and drill down on the program for which you want to create an eligibility list.
2. In the Eligibility Administration view, navigate to a detail view by clicking one of the following links for the type of list you are creating:
    - **Program Eligible.** This list defines who can apply for a program. It determines whether a partner meets the criteria to apply for the partner program. On the PRM Portal, partners sees the Apply button only on programs for which they are eligible.

      > **Note:** Clicking on the Available to All check box overrides this list. Make sure that Available to All is not selected if you want to use an Eligible Partners list.

    - **Renewal Eligible.** This list determines which partners can renew their membership to a partner program. Renewal eligibility determines whether the Renew button is active on the PRM Portal.
    - **Approval Eligible.** This list determines which partners are automatically approved for a program. The approval eligibility is associated to the approval method you chose on the Program Design view.
3. Add a record and select the partners you want.
4. Optionally, you can click Add List to import a list of partners that must be defined in a list in the List Management screen, Partner List view.

Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load

It is recommended that you use Oracle Business Intelligence Data Load when importing many partner records based on many criteria. This report generates the list of partners and provides a link to that report. For procedures for setting this process, see the following.

Use the following procedure to create an eligibility list from a report in Oracle Business Intelligence.

To create an eligibility list from a report in Oracle Business Intelligence

1. Navigate to Partner Programs screen, then the Membership Administration view and drill down on the program for which you want to create an eligibility list.
2. Select the record you need to create a list:
    - To create an Program Eligible list, select a record with the Load Name value that begins with Eligible.
    - To create a Renewal Eligible list, select a record with the Load Name value that begins with Renewal.
    - To create an Approval Eligible list, select a record with the Load Name value that begins with Approval.
3. In the Location field, select a location.

    The Location list is available only if the user IDs and user passwords in Siebel PRM and Oracle Business Intelligence are identical.
4. In the Eligibility Administration view, click Activate and scroll down to the Load History list.

    A record with the status of Pending appears.
5. As the Oracle Business Intelligence Data Load runs, click Refresh until the status changes from In Progress to Completed.
6. Scroll down to the Task Log list and check all log details.
7. In the Eligibility Administration view, click Deactivate.
8. To view information for the records that fail:
    a. Navigate to Partner Programs screen, then the Membership Administration view.
    b. Select the partner program and drill down.
    c. In the Eligibility Administration view, scroll down to see the Load History list.
    d. Select the appropriate record in the Load History list and Task Log list to view information about the status of the data load and any errors encountered during data load.

Creating a Refresh Schedule

A refresh schedule determines how often the Oracle Business Intelligence Data Load is run for each eligibility list.

Use the following procedure to create a refresh schedule.

To create a refresh schedule (brand owner)

1. Navigate to Partner Programs screen, then the Membership Administration view.
2. Select the Data Load record for which you want to add a refresh schedule.
3. If the Active flag is checked, click Deactivate to allow updates to the schedule.
4. Set up the schedule.

a. In the Start Date field, select the first date you want the data load to run.
b. In the Next Schedule Date field, select the next scheduled date you want the data load to run.
c. In the Repeat Every field, select the amount of time you want the data load to run.

   For example, if you want it to run every five days, you would select 5.
d. In the Unit field, select the unit of measure you want the data load to run.

   For example, if you want it to run every five days, you would select days.
e. In the Until field, select the last date the analytics segment is to run.

   For example:

   Start Time: Current date and time

   Next Schedule Date: Current time + 10 minutes

   Repeat Every: 4

   Unit: Days

   Until: Current date + one month.

   This means the data load is configured to be activated after 10 minutes and to run every four days until the following month.

5. Click Activate.
6. Once the start data has arrived, scroll down to the Load History list, and then click Refresh until the status is Completed.

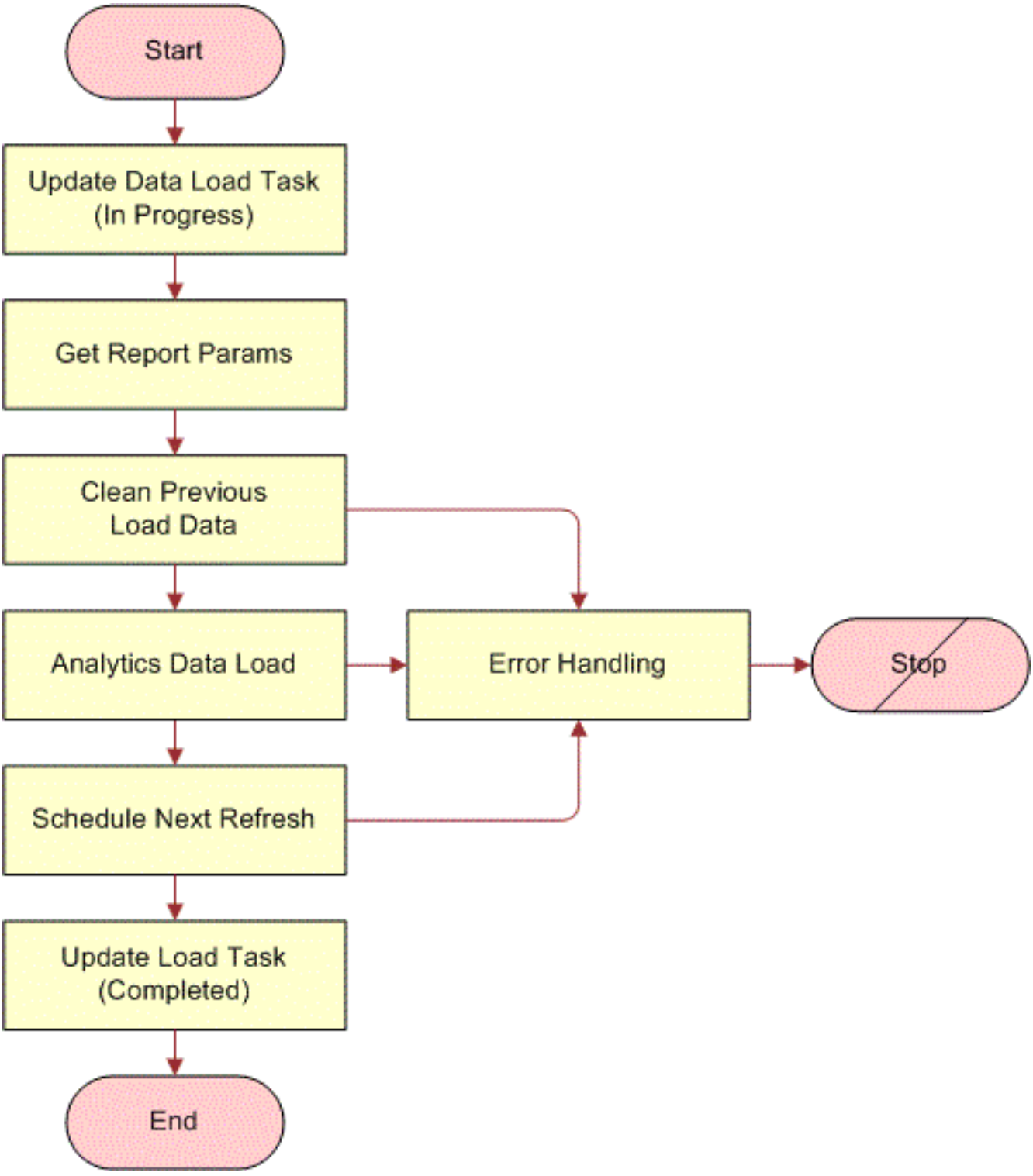
   The imported records appear in the Eligibility Partners list after the data load has run.
7. Click Deactivate.

Using Oracle Business Intelligence Data Load

Eligibility lists for partner programs can be created using Oracle Business Intelligence Data Load and then imported into Siebel OLTP.

Before you can create and import the eligibility lists, you must have the Business Intelligence reports set up and configured properly. For more information, see Oracle Business Intelligence Enterprise Edition documentation.

The following diagram shows the partner program load data flowchart.



As shown in this diagram, the steps in the partner program load data flow are as follows:

1. Update Data Load Task (In Progress)

2. Get Report Params
3. Clean Previous Load Data
   Handle Errors (as required)
4. Analytics Data Load
   Handle Errors (as required)
5. Schedule Next Refresh
   Handle Errors (as required)
6. Update Load Task (Completed)

In the Partner Program Data Load workflow, there is a step called Analytics Data Load. It has an input property called MaxErrors. Default value for this parameter is 1. If there is an error during data load, the job is terminated. It is possible to change this input property on the workflow. If the value is increased to 100, then 99 data load errors are ignored.

A Refresh of the eligibility list can be scheduled at particular intervals, for example, hour/day/month. For information on creating a refresh schedule, see *Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load*

Oracle Business Intelligence Setup Workflow on Siebel Server

The following procedure shows the steps to create a workflow for using the Analytics Report.

To create a workflow for using an analytics report

1. Activate the latest version of the following list of workflows:
   - **Workflow Name:** Partner Program Data Load **Group:** eChannel
   - **Workflow Name:** Import Marketing Contact **Group:** Marketing
2. For more information on how to activate these Workflow Processes, see *Siebel Business Process Framework: Workflow Guide* .
3. Make sure Workflow Process Manager is running.
   a. Navigate to Administration - Server Management screen, then the Components view.
   b. Query for Workflow Process Manager.
   c. One record is returned with Component Status = Online
4. Update the location of Marketing File System.
   a. Navigate to the Administration - Server Configuration screen, Servers, and then Components view.
   b. Query for Workflow Process Manager and then select it.
   c. Navigate to the Parameters view.
   d. Query for Marketing File System and change the value to the file system location of the computer where the Oracle Business Intelligence Presentation Services Server is installed.
5. Update the User Id and Password for the Oracle Business Intelligence Presentation Services Server.
   a. Navigate to Administration - Partner screen, then the Servers view.
   b. Query for Default Analytics Web Server.
   c. Update the User Id and Password.
6. Update the Web services setup.

Setting Up an Oracle Business Intelligence Report

It is important that the Oracle Business Intelligence report setup is completed and configured properly before you use it to create an eligibility list.

Use the following procedure to create an Oracle Business Intelligence report.

To create an Oracle Business Intelligence Report

1. Connect to the marketing analytics URL (http://My Server1/analytics) and log in.
2. Select More Products from the list, click Marketing on the Dashboard and then click Create a List Format to enter the start page of List formats.
3. In the List Subject area, select Marketing Account List.

   The Marketing Account List catalog appears in the side panel.
4. Select the Accounts (Transaction Database) folder in the catalog panel.
5. Select the ROW_ID column.
   - Update the Table Heading Account (Transaction Database) to Channel Partner.
   - Update the Column Heading ROW_ID to Id.

   > **Note:** Channel Partner is the name of the integration component and Id is one of the Channel Partner integration component keys. You can use other Channel Partner integration component keys or create a new one. Make sure the key uniquely identifies the record before using it.
6. Select the Partner Flag column.
   a. Apply a filter (Partner Flag = 'Y') on this column.
   b. Remove the Partner Flag column.
7. Select columns where certain query criteria are required. Apply the filters and then remove the columns.
8. Select any two columns from any folder and apply formatting to these two columns with parameterized values which are used for the PPR Partner Program Partner Integration business component and the Partner Program Data Load workflow.
   a. Format the first column as:
      - Table Heading: PPR Partner Program Partner Integration
      - Column Heading: Prog Id
      - Column Formula: '@{partnerProgramID}{0}'
   b. Format the second column as:
      - Table Heading: PPR Partner Program Partner Integration
      - Column Heading: Type
      - Column Formula: '@{eligiblePartnerListType}{0}'
9. Navigate to the Options view and select:

   Purpose = Analytics Data Load
10. Navigate to the Header and Footer view and enter the header text as the following:

    # Channel Partner

    #
11. Navigate to Options view and set these attributes:
    - Purpose = Analytics Data Load
    - Delimited (checked)
    - End of Field Delimiter = Comma

- Text Qualifier = " "

12. Save this report in a chosen folder.
13. To preview the list, navigate to the Preview view. To set up this preview functionality:

    a. Log in to the computer where Analytics Web (SAW) is installed
    b. Modify the MarketingPreviewPath in instanceconfig.xml which is located at `D:\`Analytics Server directory`\Web\config`
    c. Modify the MarketingPreviewPath in instanceconfig.xml which is located at *[Install_Drive]*:*Analytics Data directory*\Web\config
    d. Restart the SAW service

    The following is a sample list that you see:

    # Channel Partner

    #Channel Partner.Name,Channel Partner.Location,PPR Partner Program Partner Integration.Prog Id,PPR Partner Program Partner Integration.Type

    Active Systems,HQ,0,0

    Active Systems - Americas,HQ,0,0

    Asyrex Technologies,HQ,0,0

    Avaya Communications,HQ,0,0

    CKS Software,HQ,0,0

    Dun & Bradstreet,HQ,0,0

    Illuminent Technologies,HQ,0,0

    Impatica,HQ,0,0

    International Software Solutions,HQ,0,0

    Lawson Utility,HQ,0,0

    Lexis Nexis,HQ,0,0

    Outtask,HQ,0,0

    PCVista,HQ,0,0

    Puma Technology, Inc.,HQ,0,0

    SKF,HQ,0,0

    Vertica Partners,HQ,0,0

Applying to Partner Programs (Partner)

After the partner program has been set up, and the partner application has been created, the partner can use the PRM Portal to apply for membership to the program.

Partners who are not registered for partner programs can apply to partner programs on the PRM Portal as well as those who have already registered meaning the partners have some visibility to the program).

The fields that the partner must complete depend on the SmartScript or external application used when you set up the application, as described in *Setting Up Partner Program Applications*.

A partner employee might apply for membership to a program after another employee of the same partner company has already applied for membership to the same program. If the first application from that company has already been approved, an error message is displayed to the second partner who applies. If the first application has not yet been approved, an error message is not displayed and there are two application from the same partner company. However, even if the brand owner approves both applications from the same partner company, only one Program Membership record is created for that partner company, so there is not a problem of duplicate memberships.

The following procedure allows partners to apply to a partner program.

To apply as a partner

1. Log in to the PRM Portal and navigate to the Partner Programs screen.
2. Select the program you are interested in.
3. Click Apply, and complete the fields in the application.

   > **Note:** Make sure you are not currently a member of this partner program. If you are already a member, you are not allowed to apply again.

   It the partner selects the Use Agreement Item Dates check box on the application header, then start and end dates for the membership are set to the same as the start and end dates of the agreement associated with the program.
4. To check the status of your application, navigate to the Program Applications screen and query for the application.

Process of Reviewing Applications to Partner Programs

After a partner applies for a partner program using the PRM Portal, the application is available for the brand owner to view and evaluate. Brand owners can designate individuals or teams to review and approve applications for each partner program.

This only applies to programs whose approval method is manual. For more information, see *Specifying Partner Program Approval Method*.

The brand owner reviews and approves or rejects a submitted application by performing the following tasks:

1. *Accepting a Partner Program Application*
2. *Reviewing Application Inbox Information*

3. *Adding Program Entitlements to Partner Agreements*
4. *Approving a Partner Program Application*
5. *Rejecting a Partner Program Application*
6. *Notifying Partner of Application Approval by Email*

Accepting a Partner Program Application

When you accept an application, it means that the you now own the application and will review it and be responsible for approving or rejecting it.

This task is a step in the *Process of Reviewing Applications to Partner Programs*.

To accept a program application

1. Navigate to Partner Programs screen, then the Application Inbox view.
2. Select the application to be accepted and click Accept.
    - The Current Owner field is filled in with your login.
    - The Status field is Pending.
    - The Accept button in the More Info form is grayed out.

Reviewing Application Inbox Information

The Application Inbox views provide a centralized view of all information about partner program applications. After you view this information, the Application Inbox also allows you to approve or reject applications.

> **Note:** Prospective and qualified partners can apply for partner programs but their applications do not appear in these views until they are registered. For information on registering a partner, see *Process of Enrolling a New Partner Company*.

This task is a step in the *Process of Reviewing Applications to Partner Programs*

To view application information

1. Navigate to Partner Programs screen, then the Application Inbox view.
2. Drill down on the Tracking # field for an application.

   General information about this application appears in the More Info view.

Viewing Application Details

The Application Detail view shows each question on the program application with the corresponding responses from the partner. These question/answer pairs can be in one of these two formats:

- **Smartscript Session:** For questions where the Save Answer Table is checked. For more information on Smartscript, see *Siebel SmartScript Administration Guide* .
- **External Application:** If membership applications are delivered using .jsp or .asp pages, the PPR Partner Program Application Detail Integration Component within the PPR Partner Program Integration Object must be used for mapping and integration.

To view application details

1. Navigate to the Application Detail view.
2. For each question in the Question field, review the applicant's answers in the Answer field.

Viewing Application Attachments

The Attachments view shows any attachments submitted by the partner as part of the application.

To view application attachments

1. Navigate to the Attachments view.
2. Review all attachments.

Viewing Application Activities

The Activities view shows activities associated with application approvals. These activities might be prepopulated based on an activity template defined for the program.

> **Note:** You can create an Activity Template (of type PRR Partner Prog Application) by navigating to the Administration - Data screen, then the Activity Templates view.

To view application activities

1. Navigate to the Activities view.
2. Review activities.

Viewing the Application Audit Trail

The Audit Trail view logs any updates made to key fields. For example, you can track updates to Status and Partner Name fields in the Audit Trail.

To view the application audit trail

1. Navigate to the Audit Trail view.
2. Review the audit trail.

Viewing Application MDF Programs

All Market Development Fund (MDF) programs that are associated with the partner program appear in the MDF Program view. After you approve the application, the partner is eligible for all these MDFs. For more information about MDFs, see *Using Market Development Funds*

Before you approve the partner's application, view these MDF programs and verify that the partner is eligible for all of them. If so, you can generate an MDF program account for the partner.

The brand owner can also generate new MDF program accounts for the partner from this view as needed.

> **Note:** The following procedure applies to the Advanced MFD option only. For more information, see *The Advanced MDF Option*.

To view MDF programs associated with the application

1. Navigate to the MDF Program view.

2. Review the MDF programs.
3. Click Generate Account to generate an MFD program account for that partner.

Viewing Program Membership History

The Program Membership view displays a history of this partner's previous memberships in this program.

It is important to review the membership history to see whether this partner has been a member of this program in the past and has been terminated.

Reviewing the history, you might also find that the partner is already a member of the program. Two partner employees submitted applications to the program, and one has already been accepted.

To view the partner's program membership history

1. Navigate to the Partner Programs screen, then the Application Inbox view.
2. Drill down on the Tracking Number for the application.
3. Navigate to the Program Membership view.
4. Review the partner's history of membership in this program.
   The Program memberships list includes all memberships of this partner in this program, whatever their status.

Adding Program Entitlements to Partner Agreements

There is an agreement between the brand owner and each partner company that specifies which entitlements the partner has.

Programs can have entitlements, as described in *Associating Entitlements with Partner Programs*. If a partner is added to a program that has entitlements, the entitlements for the program are added to that partner's agreement.

When a partner applies to join a program, the brand owner's partner administrator can use the Agreements view of the application inbox to:

- View existing agreements with this partner.
- Create a new agreement with this partner. The entitlements associated with this program is automatically associated with this new agreement and displayed in the Associated Agreements list.

If the brand owner's partner administrator deletes an agreement from the partner program, partners who join the program in the future are not be bound by the agreement, but partners who are already members of the program are still bound by the agreement that they accepted when they joined.

New entitlements that are added to the agreement because the partner joined the program have begin and end dates that are based on the program begin and end dates. If the partner does not have an existing agreement, the new agreement that is created also has begin and end dates based on the program begin and end dates.

You can view all of the agreements with this partner in Partner Programs screen, Program Members Administration, and then Agreements view.

This task is a step in *Process of Setting Up Partner Programs*.

To add program agreements to a partner's agreements

1. Navigate to the Partner Programs screen, then the Application Inbox view.
2. In the desired program, drill down on the program name.
3. Navigate to the Agreements view.

The Agreements list includes existing agreements with this partner.

4. In the Agreements list, add a new record and complete the necessary fields.
5. Click Associate.

   The Associated Agreement form's Agreement area is populated with information about the entitlement for this partner program.

Approving a Partner Program Application

After reviewing all the application data, the application owner can approve the application by clicking the Approve button on the Application Inbox view.

When a partner is approved for the partner program, a membership record is automatically created and some fields are populated, as described in *Updating Partner Program Membership Records*. The partner is also added to the access groups associated with this partner program.

The workflow used in the following procedure is the PPR Auto Approval Workflow.

Approving or rejecting an application is a task in the *Process of Reviewing Applications to Partner Programs*.

To approve an application

1. Navigate to Partner Programs screen, then the Application Inbox view.
2. Select the application and click Approve.
3. A message appears saying, You are approving an application. This will create a membership record for this partner. Do you wish to continue?
4. Click Yes.
5. The Status field is set to Approved, and the application becomes read-only.

Rejecting a Partner Program Application

If the application is not approved, you can reject it by clicking the Reject button on the Application Inbox view.

To reject an application (brand owner)

1. Navigate to Partner Programs screen, then the Application Inbox view.
2. Select the application and click Reject.

   A message appears saying, Are you sure you would like to reject this application?
3. Click Yes.

   The Status field is set to Rejected.

Notifying Partner of Application Approval by Email

When you approve a partner to join a partner program, Siebel PRM informs the partner with an email from the brand owner.

Email notification is a workflow or business service that automatically sends a partner an email when their application is approved. The brand owner can copy this workflow and modify it for other purposes, for example, notifying partners that they were rejected or notifying partners that their memberships are about to expire. For more information, see *Activating the Partner Program Workflows*.

Partner Program Administration

After you have created partner programs and enrolled members, partner programs are maintained in the following ways:

- *Updating Partner Program Membership Records*
- *Performing Mass Updates of Partner Programs*
- *Associating MDF Programs with Existing Partner Programs*
- *Adding Agreements with Partner Program Members*
- *Partner Program Membership Renewal*

Updating Partner Program Membership Records

When a partner is approved for the partner program, a membership record is automatically created. This record is populated with the following data:

- **Begin Date.** The day the membership begins.
- **End Date.** The day the membership expires. After this date the Membership Status automatically changes to In Grace Period.
- **Renewal Begin Date.** The date after which the partner can apply for renewal.
- **Renewal End Date.** The date after which the partner cannot apply for renewal. When this date passes, the Membership Status changes to Expired and the partner must reapply.
- **Renewal Ineligible.** A check box that, when checked, makes the partner ineligible to renew. This field is unchecked by default.
- **Member Status.** Values are Current Member, In Grace Period, Expired, and Terminated. This field is read-only.
- **Active.** This read-only flag indicates whether the partner is an active member in this program.

When any of these fields requires an update, you can type over the existing data to change it.

To view or change partner membership information

1. Navigate to Partner Programs screen, then the Membership Administration view.
2. Select and drill down on the partner program and then navigate to the Membership view.

   Program membership data such as membership status and program begin and end dates appears.
3. To change existing data, enter new data in the fields you want to change.

Performing Mass Updates of Partner Programs

Brand owners can add or remove lists of partners to or from partner programs. The Mass Update functionality is a means to create a partner list to add or remove program members. This task can be performed manually or can be set up in Oracle Business Intelligence.

There is a user property called MassUpdateLimit on the PPR Partner Program Partner business component (buscomp).The default value of this parameter is 500. The value in this user property determines the maximum number of records that can be processed at one time. This user property only applies to mass updates, and not to eligibility administration for partner programs. For more information about buscomps and user properties, see *Siebel Developer's Reference* .

You can create a mass update list for a partner program by entering data manually or using Oracle Business Intelligence. It is recommended that you use the Oracle Business Intelligence Data Load process when you need to import many partner record based on many criteria. For information on setting up Oracle Business Intelligence Data Load process, see *Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load*.

Creating a Mass Update List Manually

Use the following procedure to create a mass update list manually.

To create a mass update list manually

1. Navigate to Partner Programs screen, then the Membership Administration view and drill down on the program.
2. Navigate to the Mass Update view.
3. In the Mass Update list:
    - Click Add to add records, and select the records you want to add in the Pick Partner dialog box.
    - Click Delete to delete the partner from the Mass Update list.
4. Optionally, you can use the Add List button to import a list of partners that must be defined in a list on the List Management, Partner List view.

Creating a Mass Update Using Oracle Business Intelligence Data Load

Use the following procedure to set up a mass update using Oracle Business Intelligence Data Load.

To create a mass update list using an Oracle Business Intelligence report (brand owner)

1. Navigate to Partner Programs screen, then the Membership Administration view, and drill down on the program.
2. Select the Mass Update Data Load record that appears in the Eligibility Administration list, then click on the Location field, and then select an Analytics report from the picklist.
3. Click Activate and scroll down to the Load History list.
4. As the Oracle Business Intelligence Data Load task runs, click Refresh to update the status value and select an Analytics report from the picklist.
5. For the procedure for scheduling a Mass Update data load, see *Creating a Partner Programs Eligibility List Using Oracle Business Intelligence Data Load*

Executing a Mass Update List

Use the following procedure to execute a Mass Update list.

To execute a mass update list

1. Navigate to Partner Programs screen, Membership Administration, and then Mass Update view.
2. Select a partner record or multiple records.

   > **Note:** The following processes are background processes; you can continue to use the PRM application while the mass update is executing.

   - To add this partner as a member to the program, click Add As Members.
   - To remove this partner from the program, click Remove From Program.

     The record is not physically deleted, but its Membership Status field is changed to Terminated.

     > **Note:** When you add a partner as a member to the program, the partner is also added to the access group that was automatically created when the program was created.
3. Navigate to the Membership view to view the status of each partner.

Associating MDF Programs with Existing Partner Programs

Brand owners can associate one or more Market Development Fund (MDF) programs with an existing partner program. This association makes partners in the program eligible to receive these MDFs.

> **Note:** This procedure applies to the Advanced MDF option only. For more information, see *The Advanced MDF Option*.

To add MDF programs to a partner program

1. Navigate to the Partner Programs screen, then the Membership Administration view.
2. Drill down on the name of the desired partner program
3. Navigate to the MDF Program view.
4. Add a record and select one or more MDF Program records.
5. Check the Auto Create Account flag if you want an MDF Program account to be created automatically for the selected MDF Program when the partner is approved for membership.
6. Drill down on the MDF program name.
7. Navigate to the Partner Programs view.
8. Click Generate Program Participants.
9. Navigate to the Program Participant view.
10. In the Program Account view, click Generate.

    New MDF program accounts are generated for these members of the Partner Program.

Adding Agreements with Partner Program Members

You can add agreements that apply to partners who are already members of a partner program.

You can do this if there is some new agreement that applies to members of a program. For example, a new agreement might be needed because your product line has changed.

You can also do this if you did not add needed agreements to the partner program application.

Agreements can be added to the application before approval if it is approved manually in the partner program inbox. If the application was approved automatically or if the partner was added to the program by a partner manager, you can add agreements to the membership. For more information about agreements, see *Adding Program Entitlements to Partner Agreements*.

To add an agreement with a partner program member

1. Navigate to Partner Programs screen, Program Members Administration, and then Agreements view.
2. Add new records, as described in *Adding Program Entitlements to Partner Agreements*.

Terminating a Partner Program Membership

You can remove a partner from a partner program using this procedure.

To display all partners in a program and terminate memberships

1. Navigate to Partner Programs screen, then the Membership Administration view.
2. In the Partner Programs list, drill down on the name of the desired program.
3. Navigate to the Mass Update view.
4. In the Mass Update list, select the records of partners to be terminated from this program and click Remove from Program.

Partner Program Membership Renewal

Partners can use the Partner Portal to apply to renew their membership during the renewal period.

When the renewal period begins, send an email to the partner saying they must apply to renew their membership; you can set up a workflow to send this email automatically, as described in *Notifying Partner of Application Approval by Email*. The member has until the Renewal End Date to renew the membership. The partner remains a full member of the program until the Renewal End Date.

The partner applies for renewal on the Program Membership view of the Partner Portal, by selecting the appropriate membership record and clicking the Renew button.

When the partner applies for renewal, the Siebel Business Application creates a new Activity record for the partner of the type Renewal Application.

If this is a program whose applications must be approved manually, the partner administrator at the brand owner company must look at the activity records regularly to see if there are any new activities of the type Renewal

Application. If there are, the partner administrator reviews and approves these applications in the inbox, as described in *Process of Reviewing Applications to Partner Programs*.

When membership expires or is terminated, the status of agreement line items is automatically changed, so partners no longer have the entitlements that they had as members of the program. When the application renewal is approved, the agreement line items for the renewed membership are added based on the agreement line items in the previous membership for the partner program, updated so they are effective during the begin and end dates of the partner's new membership.

The Member Status field in the Partner Programs screen, Program Members Administration view changes automatically. It can have the following values:

- **Current Member.** This value is automatically set when the partner is added to the Partner Program as a member. The Agreement Line Item Status field is automatically set to Current.
- **Expired.** This value is automatically set when the Renewal End Date of the Member record has passed. The Agreement Line Item Status field is automatically set to Expired. Any Entitlements based on the Partner Program Entitlement Templates have the End Date automatically set to the system date.
- **Approved Member.** This value is automatically set if the renewal is approved but original membership has not expired yet. After the original membership has expired, the status changes to Current Member.
- **In Grace Period.** This value is automatically set when the Membership End Date of the Member record has passed, but the Renewal End Date has not passed, meaning that membership has expired but there is still time to renew. There is no affect on Agreement Line Item Status.
- **Terminated.** This value is automatically set when the user navigates to the Remove From Program button in the Mass Update view. The Agreement Line Item Status is automatically set to Cancelled.

> **Note:** If the Partner Program end date passes, a workflow sets the Partner Program Status to Inactive, but there are not automatic changes to the Agreement Line Item Status field. If you want the Agreement Line Item Status to change automatically, you must configure this workflow.

Partner Program Workflows

For a description of workflows used in partner programs, see *Activating the Partner Program Workflows*.

7 CHAMP Planning

CHAMP Planning

This chapter describes how Siebel PRM is used to support the Channel and Alliance Management Process (CHAMP) methodology to develop plans that allow you to work collaboratively with partners. It includes the following topics:

- *About CHAMP Planning*
- *Scenario for CHAMP Planning*
- *Process of Using the Siebel PRM CHAMP Planning Module*

About CHAMP Planning

The Siebel PRM planning module incorporates the business planning component of the industry-standard Channel and Alliance Management Process (CHAMP) methodology. CHAMP is an established and replicable process that lets brand owners and their business partners work collaboratively to develop and execute effective partnerships.

There are two phases to the CHAMP methodology:

- **CHAMP Partner Planning.** Partner planning is a facilitated session designed for an internal audience of channel or alliance managers at the brand owner company. The Siebel professional helps the channel managers analyze the partner's business and their own business to find the best opportunities for the two companies to work together. This phase produces a business plan for the partner relationship.
- **CHAMP Joint Planning.** Joint planning is a facilitated session designed for the brand owner and partner. Using the plan that resulted from the CHAMP Partner Planning session as a foundation, the two organizations meet face-to-face to define their partnership strategy and business plan.

The Siebel PRM CHAMP Planning module lets the user create, capture, and track partnership initiatives and partner plans. Partner plans include clearly defined objectives, action plans that detail how each partner company will achieve its objectives, and metrics for measuring the success of each partner in achieving its objectives.

You might have other ways of working with your partners. CHAMP planning is not required, but it does have a track record of improving the execution, effectiveness, and overall success of partner relationships.

The CHAMP Planning module is included in the Siebel PRM product. Customers purchase the CHAMP methodology separately.

Scenario for CHAMP Planning

This topic gives one example of how CHAMP planning might be used. You might use CHAMP planning differently, depending on your business model

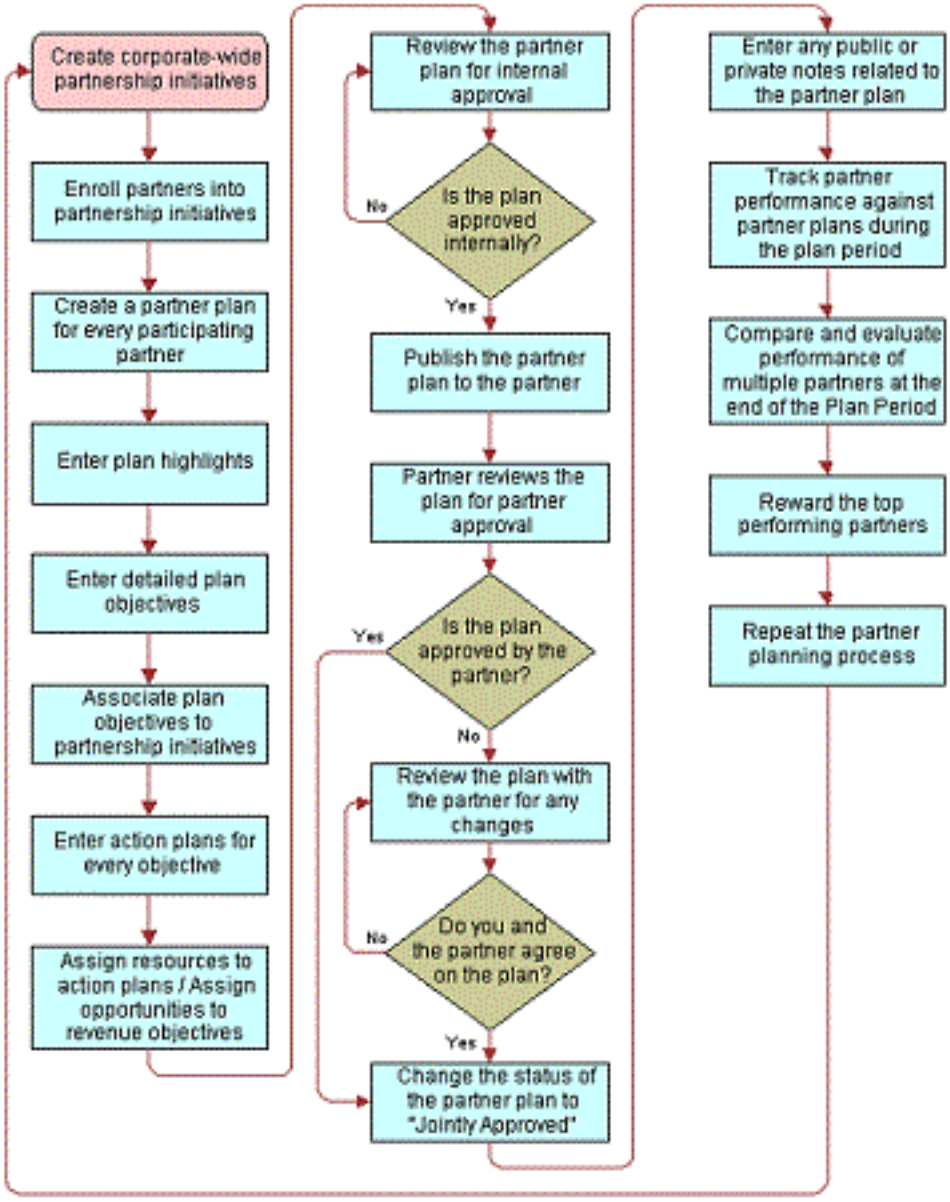
- Your company sells computers and Internet services to consumers and to small and medium businesses, depending to a large extent on resellers to go to market. Your company has recently outlined a corporate strategy to identify and penetrate new markets for growth and profitability.
- As part of this corporate strategy, your company has developed an initiative to enter into the North American financial services market for small and medium businesses. It has named this initiative "Foray into Financial Services," and has set the revenue goal of $200M for the fiscal year 2005 as part of the initiative.
- To execute the initiative, your company plans to use existing reseller partners who focus on the financial services industry. In addition, your company has already run a marketing campaign to recruit new reseller partners who focus on this industry and has selected six new partners.
- Your company recognizes the importance of carefully mapping out how you will work with each partner. Therefore, your company uses the CHAMP Partner Planning methodology to develop a strategy for each partner. Then, you invite their key partners to a CHAMP Joint Planning session to discuss and agree on the partnership strategy, and to develop detailed goals for the partnership. The CHAMP process provides:
    - A clear definition of each company's reasons for partnering, success metrics, and expectations for the partnership.
    - A better understanding of each company's business including their growth strategy, products and services, and their sales model.
    - The ability to identify, evaluate, and select the business initiatives that will help the partnership succeed.
    - The ability to assess and track the revenue potential of the partnership.
    - A business plan for developing and executing the partner relationship.
- You use the CHAMP Planning Module in Siebel PRM to create your business plan for the partnership. Your partners use the Siebel PRM Portal to:
    - Look up their objectives.
    - Design detailed action plans to achieve these objectives.
    - Assign its employees as resources to each of the action plans.
    - Associate various opportunities with each of its revenue objectives, so it knows how its revenue objectives can be achieved.
- During the plan period and at the end of the plan period, your company uses the Siebel PRM Manager to track the performance of each of its partners, compare the performance of its partners, and to design incentives for partners based on their performance. At the same time, your partners use the Siebel PRM Portal to compare their actual performance with their objectives.

Process of Using the Siebel PRM CHAMP Planning Module

To use the CHAMP Planning Module in Siebel PRM, you perform the following tasks:

1. *Creating CHAMP Metrics*
2. *Creating Partnership Initiatives*
3. *Creating Partner Plans*
4. *Approving the Plan Jointly with the Partner*
5. *Executing the CHAMP Plan*
6. *Evaluating Partner Performance*
7. *Reviewing Partner Performance*

A detailed diagram of the steps the brand owner performs in the CHAMP Planning Module of Siebel PRM is shown in the following diagram.


Create corporate-wide partnership initiatives
Enroll partners into partnership initiatives
Create a partner plan for every participating partner
Enter plan highlights
Enter detailed plan objectives
Associate plan objectives to partnership initiatives
Enter action plans for every objective
Assign resources to action plans / Assign opportunities to revenue objectives
Review the partner plan for internal approval
Is the plan approved internally?
No
Yes
Publish the partner plan to the partner
Partner reviews the plan for partner approval
Is the plan approved by the partner?
Yes
No
Review the plan with the partner for any changes
Do you and the partner agree on the plan?
No
Yes
Change the status of the partner plan to "Jointly Approved"
Enter any public or private notes related to the partner plan
Track partner performance against partner plans during the plan period
Compare and evaluate performance of multiple partners at the end of the Plan Period
Reward the top performing partners
Repeat the partner planning process

As shown in this diagram, the steps the brand owner performs are as follows:

1. Create corporate-wide partnership initiatives.
    a. Enroll partners into the partnership initiatives.
    b. Create a partner plan for every participating partner.
    c. Enter plan highlights.
    d. Enter detailed plan objectives.
    e. Associate plan objectives to partnership initiatives.
    f. Enter action plans for every objective.
    g. Assign resources to action plans/assign opportunities to revenue objectives.
    h. Review the partner plan for interval approval.
2. Is the plan approved internally?

    If yes, then:

    a. Publish the partner plan to the partner.
    b. Partner reviews the plan for partner approval.

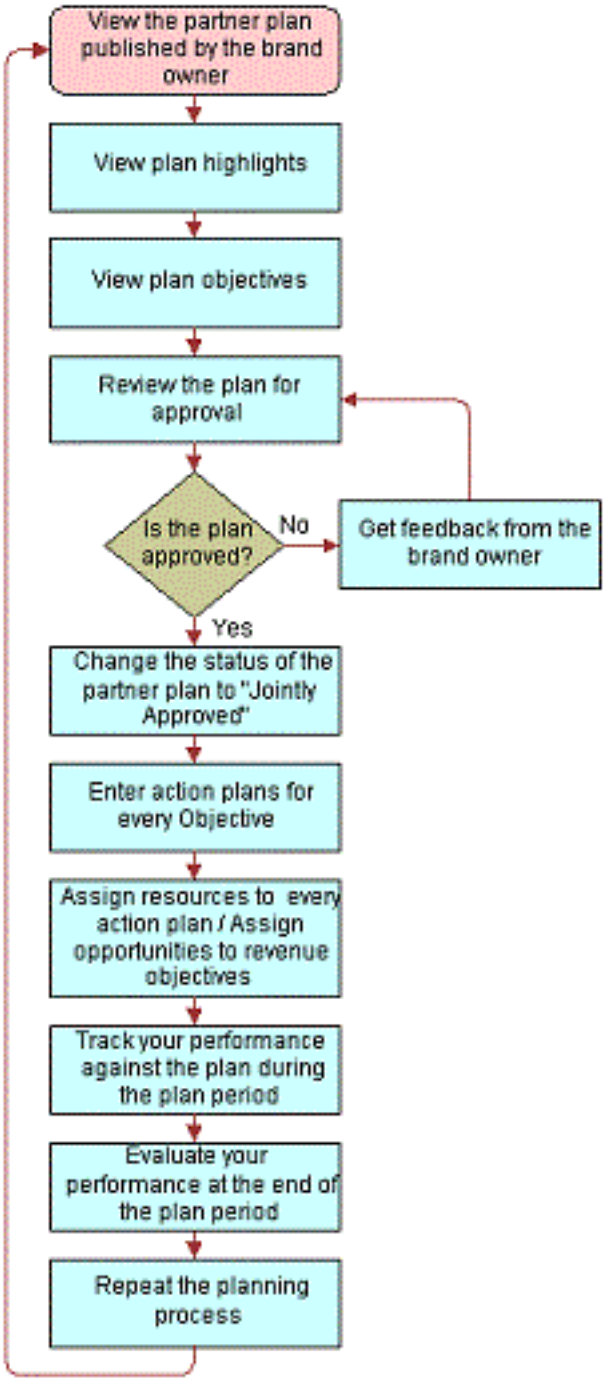
    If no, then return to step 1h.
3. Is the plan approved by the partner?

    If yes, then go to step 4.

    If no, then review the plan with the partner for any changes.

    Keep reviewing the plan until you and the partner agree on the plan, then go to step 4.
4. Change the status of the partner plan to "Jointly Approved".
5. Enter any public or private notes related to the partner plan.
6. Track partner performance against partner plans during the plan period.
7. Compare and evaluate performance of multiple partners at the end of the plan period.
8. Reward the top performing partners.
9. Repeat the partner planning process.

A detailed diagram of the steps the partner performs in the CHAMP Planning Module of Siebel PRM is shown in the following image.


View the partner plan published by the brand owner
View plan highlights
View plan objectives
Review the plan for approval
Is the plan approved?
No
Get feedback from the brand owner
Yes
Change the status of the partner plan to "Jointly Approved"
Enter action plans for every Objective
Assign resources to every action plan / Assign opportunities to revenue objectives
Track your performance against the plan during the plan period
Evaluate your performance at the end of the plan period
Repeat the planning process

As shown in this diagram, the steps the partner performs are as follows:

1. View the partner plan published by the brand owner.
    a. View plan highlights.
    b. View plan objectives.
    c. Review the plan for approval.
2. Is the plan approved?

    If yes, then go to step 3.

    If no, then get feedback from the brand owner and return to step 1c.
3. Change the status of the partner plan to "Jointly Approved".
4. Enter action plans for every objective.
5. Assign resources to every action plan/assign opportunities to revenue objectives.
6. Track your performance against the plan during the plan period.
7. Evaluate your performance at the end of the plan period.
8. Repeat the planning process.

Creating CHAMP Metrics

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

You must create CHAMP metrics before you create any CHAMP plans.

CHAMP metrics let you categorize CHAMP objectives in ways that let you measure them. For example, if you are going to develop a series of CHAMP plans with different partners to increase sales of a product, you could create a metric named Sales Revenue. Then, when you evaluate partner performance, you can search on the metric field to list the objectives with Sales Revenue as the metric, so you can compare the target and actual performance of your partners.

In CHAMP planning, performance is measured using the Target and Actual value fields of each objective. The metric defines and categorizes objectives, so you can measure and compare the performance of different partners.

You must create all the appropriate metrics before creating any CHAMP plans. Analyze your CHAMP planning program and decide how you want to use metrics to measure and categorize objectives. When you create a specific CHAMP plan, the metrics that you have created are available in the picklist of the Metrics field of the plan's objectives.

Viewing CHAMP Metrics

If you have an ongoing CHAMP planning program, view existing CHAMP metrics before adding any new metrics.

To view CHAMP metrics

1. Navigate to the Administration - Data screen, then the List of Values view.
2. Click Query.

    The Find List of Values form appears.
3. In the Type field, enter CHAMP_METRIC_CD and click Go.

    A list of Metrics of the type CHAMP_METRIC_CD appears.

Adding New CHAMP Metrics

Before you add new metrics, analyze your CHAMP planning program and decide what metrics you need to measure the performance of your CHAMP participating partners.

To add a new CHAMP metric

1. Navigate to the Administration - Data screen, then the List of Values view.
2. In the List of Values list, add a new record.

   The Find List of Values form appears.
3. In the Type field, enter CHAMP_METRIC_CD.
4. In the Order field, enter the order in which this metric is to appear on the list of values in the picklist for the Metric field of Objective records.
5. In the Display Value field, enter the name for this metric that is to appear in the list for the Metric field of Objective records.
6. Click Language Name, and select the language for this record.
7. Other fields are optional and are not generally used in CHAMP planning. Complete the other fields only if you have a special reason to do so.

   This metric is added to the Metrics list.

Creating Partnership Initiatives

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

After you have created the appropriate CHAMP metrics, you can begin the CHAMP planning.

The first step in CHAMP planning is to create initiatives to outline your high-level partnership strategies.

A partnership initiative is a large-scale or general business strategy that involves working with partners. For example, if a computer manufacturer wants to work with its partners to penetrate the untapped market segment of financial services, it might create an initiative named *Foray into Financial Services*. It might use existing partners, such as value-added resellers, to work on this initiative or form new partnerships with partner companies that have experience in this industry.

As part of creating an initiative, you specify which partners participate in it.

To create an initiative, you go through the following process:

- Add an initiative
- Add partners as participants in the initiative

Adding an Initiative

To create initiatives, you must first add an initiative.

Use the following procedure to add an initiative.

To add an initiative

1. Navigate to the CHAMP Planning screen.
2. The Initiatives view is displayed by default.

3. In the Partnership Initiatives list, add a new record.
4. Enter the information in the following table in the fields of the new record and the fields of the More Info form.

Field	Description
Name	Enter a name for the initiative.
Description	Enter a description of the initiative for your own use.
Period	Select the period for which this initiative is valid.
Start Date	The start date of the selected period is entered automatically, based on your selection in the Period field. This is a read-only field.
End Date	The end date of the selected period is entered automatically, based on your selection in the Period field. This is a read-only field.
Target Market	Select the market segments toward which this initiative is targeted.
Target Amount	Enter the target amount of money you expect this initiative to generate.
Target Quantity	Enter the target quantity you expect the initiative to achieve. For example, if the goal of the initiative is to get new customer accounts, enter the number of new accounts you hope to get.
Actual Amount	After the period of the initiative has ended, you enter the actual amount of money this initiative generated.
Actual Quantity	After the period of the initiative has ended, you enter the actual quantity this initiative achieved.
Active	This read-only field indicates whether the initiative is still active. It is automatically set to True on the start date and set to False after the end date.

Adding Partners as Participants in an Initiative

Participants in an initiative are partner companies that are best positioned to work on the initiative. You might also form new partnerships with companies that are especially qualified to work on the initiative.

You must add these partners as participants in the initiative.

To add a partner company as a participant in an initiative

1. Navigate to the CHAMP Planning screen.

Initiatives view is displayed by default.

2. In the Partnership Initiatives list, drill down on the name of the initiative to which you want to add partners.
3. If necessary, navigate to the Initiative Participants view.
4. In the Initiative Participants list, add a new record.

   The Add Partner dialog box appears.
5. Choose one or more partners and click OK.

   The partners are added to the Participating Partners list.

Creating Partner Plans

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

Partner plans allow brand owner companies to work with their partners to set up joint business plans that contribute to initiatives. A partner plan is specific to one partner company. For example, a partner plan could have a specific partner company generate $1M in revenues by selling a 300GHz server to the financial services customers in the northeastern United States. This plan goal could eventually contribute to a larger initiative to generate $500M from the sales of the new 300GHz server. These plans include specific objectives for each partner, so that you can measure each partner's performance on this initiative.

Initiatives are general company strategies, so they are visible only to your company. Plans are strategies for working with specific partner companies, and so they are visible to your company and to the partner companies that are involved.

To create and use a partner plan, you go through the following process:

- Create a new plan, which involves the following steps:
  - Add a plan and its highlights.
  - Add objectives for the plan.
  - Associate opportunities with each revenue objective.
  - Add an Action Plan for each objective with resources for each Action Plan item.
- Approve the plan internally and publish it to the partner.
- Approve the plan jointly with the partner.
- Optionally, add notes to the plan.

About CHAMP Partner Plan Lists

From the CHAMP Planning screen, Plans List view a number of different partner plan lists are available. The following table describes each list.

List	Description
My Partner Plans	This list displays all partner plans owned by the user.
All Partner Plans	This list displays all partner plans of the partners in the same organization as the user.

List	Description
All Partner Plans Across My Organizations	This list displays all partner plans of the partners in the same organization and sub-organizations of the user.
All Partner Plans Across Organizations	This list displays all the partner plans of the partners in all organizations.

Adding a Plan and Its Highlights

The first step to create a new plan is to add a new Plan record, with which you associate the information about the plan.

When you add a plan record, you also enter the highlights for the plan, which are an overall view of the goal, value propositions, and critical success factors for the plan.

To add a new plan and its highlights from the CHAMP Planning screen

1. Navigate to the CHAMP Planning screen, then the Plans List view.
2. In the My Partner Plans list, add a new record.
3. Enter the information in the following table in the fields of the new record and of the More Info form.

Field	Description
Plan Name	Enter a name for the partner plan.
Partner	From the list of partner companies, select the name of the partner for which this plan is being created.
Period	Select the period for which the plan is valid. For example, the picklist might contain 2008 or Q2 2008.
Period Type	This read-only field displays whether the period you selected is a quarter, month, year, and so on.
Start Date	This read-only field displays the start date of the period you selected.
End Date	This read-only field displays the end date of the period you selected.
Status	Select the status of the plan. When you are working on creating the plan, select In Progress. When you submit the plan for internal review, select Pending Review. Later, as the plan is approved by the internal audience, select Internally Approved and when the plan is approved both by the internal and the partner audience, select Jointly Approved.
Publish to Partner	This field indicates whether the plan is visible to the partner through the Siebel PRM Web site. When you are creating the plan, select False. Later, after the plan has been internally approved and is ready to be approved by the partner, select True.

Field	Description
Active	This read-only field indicates whether the plan is still active. It is automatically set to True on the start date and set to False after the end date.
Created Date	The date when the plan record was created is entered automatically.
Created By (Created by Name)	The Login ID of the person who created the plan is entered automatically.
Last Updated (Updated Date)	The date when the plan record was last modified is entered automatically.
Last Updated By (Updated By Name)	The Login ID of the person who last modified the plan is entered automatically.

4. Click the plan name to drill down to the Plan Objectives view of the CHAMP Planning screen, which is used for adding objectives to the plan. For more information on adding objectives, see *Creating Partner Plans*.
5. To add other key information about the plan, navigate to the Plan Highlights view.
6. In the Plan Highlights form, enter the information in the following table.

Field	Description
Plan Goal	Enter the plan's goal, describing the overall purpose of the plan. For example, a plan goal could be *Increase market share for the new servers by 20% before the end of fiscal year 2008*.
Value Proposition to My Company	Enter a description of the plan's value proposition to your company. For example, the value proposition could be *Increased market share for my new servers*.
Value Proposition to Partner	Enter a description of the plan's value proposition to this partner company. For example, the value proposition could be *New line of business*.
Value Proposition to Market	Enter a description of the plan's value to the market. For example, the value proposition could be *Availability of better and high-performance server products*.
Critical Success Factors	Enter a description of the critical success factors of the plan. For example, some of the critical success factors could be *Timely training and certification of the partner in the new server products* and *Timely execution of focused marketing campaigns*.

Adding Objectives to the Plan

Objectives establish specific goals for the partner plan, which are used later to measure the partner's success in implementing the plan.

When you create an objective, you enter a target for that objective. After the plan has been completed, the actual performance data can be entered manually or automatically.

An objective is defined using metrics. Metrics allow objectives to be measurable and categorized. Objectives can be revenue or nonrevenue. For example, "Generate $3M in revenues" is a revenue objective while "Train three employees from the partner company" is a nonrevenue objective. To allow measurement of both these types of objectives, Siebel PRM allows you to define quantity and amount metrics as follows:

- **Quantity.** If the objective is a quantity, enter the target quantity when you create the objective and enter the actual quantity after the objective is completed. For example, if your company is trying to sell a new line of printers, the measure could be the number of printers the partner has sold.
- **Amount.** If the objective is an amount, enter the target amount when you create the objective and enter the actual amount after the objective is completed. For example, if your company is trying to achieve $3M in sales by selling a new line of printers, you could measure your partner on the amount of sales revenue generated by selling the new line of printers.

To enter plan objectives

1. Navigate to the CHAMP Planning screen, then the Plans List view.
2. Select the appropriate partner plan list and drill down on the name of the plan to which you want to add objectives.
3. Navigate to the Plan Objectives view.
4. In the Plan Objectives list, add a new record.
5. Enter information in the following table about the objective in the new record and in the More Info form.

Field	Description
Objective	Enter a name for the objective.
Strategy	Enter a general summary of your strategy for how this objective is to be achieved.
Metric	Select the metric that used to measure the objective.
Initiative	Drill down on the name of the initiative to which this objective is linked.
Partner Accountable	Select this flag if the partner company is accountable for meeting this objective. (If both your company and the partner company are accountable, select both the Internally Accountable and the Partner Accountable flags.)
Internally Accountable	Select this flag if your company is accountable for meeting this objective. (If both your company and the partner company are accountable, select both the Internally Accountable and the Partner Accountable flags.)
Product	Optionally, select the product that the partner must sell, be trained on, or work with, as a part of the objective.
Training Course	Optionally, select the training course that must be completed as part of the objective.

Field	Description
Target Quantity	Enter the target value for the metric associated with this objective.
Target Amount	Enter the target value for the metric associated with this objective.
Condition Clause	Enter a brief description of the condition that must be satisfied.
Target Industry	Optionally, select industries that are targeted as a part of the objective.
Target Market	Optionally, select the market that is targeted as a part of this objective.
Fund	Optionally, select the market development funds used for the objective.
Actual Quantity	At the end of the plan period, enter the actual value for the metric. You can do this manually, or if the product has been configured with the appropriate workflows or business services, it can be done automatically.
Actual Amount	At the end of the plan period, enter the actual value for the metric. You can do this manually, or if the product has been configured with the appropriate workflows or business services, it can be done automatically.
Condition Met	When the plan has been completed, if the metric has a condition, select this flag if the condition clause was satisfied, or leave it unselected if the condition clause was not satisfied.
Shared	This flag defaults to True to indicate that this objective is shared with the partner and is a CHAMP objective. If you deselect this flag so the objective is not visible to the partner, then you must select the Internally Accountable flag and deselect the Partner Accountable flag, to indicate that your company is solely accountable for this objective.

6. Continue to add new records to the Objectives list until you have entered the objectives for this plan.

About CHAMP Objectives Lists

From the CHAMP Planning screen, Objectives List view a number of different objectives lists are available. The following table describes each list.

List	Description
My Plan Objectives	This list displays all plan objectives owned by the user.

List	Description
All Plan Objectives	This list displays all plan objectives of the partners in the same organization as the user.
All Plan Objectives Across My Organizations	This list displays all plan objectives of the partners in the same organization and sub-organizations of the user.
All Plan Objectives Across Organizations	This list displays all plan objectives of the partners in all organizations.

Associating Opportunities with Each Revenue Objective

If an objective is a revenue objective, that is, if it has a metric such as sales revenue or some other form of direct revenue, you can associate it with an opportunity or opportunities. This feature lets you develop a road map of how the revenue target will be achieved in terms of the available opportunities.

You can associate one or more opportunities with each revenue objective.

To associate an opportunity plan with a revenue objective

1. Navigate to the CHAMP Planning screen, then the Objectives List view.
2. Select the appropriate objectives list and drill down on the objective with which you want to associate an opportunity.
3. Navigate to the Opportunity Plan view.
4. In the Opportunity Plan list, add a new record.
5. Choose one or more opportunities and click OK.

Adding an Action Plan and Resources for Each Objective

You develop a specific action plan for every objective. An action plan is a list of activities that your company and the partner company will perform to achieve the objective.

When you create the action plan, you give each of its activities a planned start date and completion date. As you execute the plan, you enter the actual start and completion dates for each activity. If an activity is created by a partner or assigned to a partner, your partner must record its progress by using the Siebel PRM Portal to enter the begin and completion dates, and you can check its progress using the Siebel PRM Manager.

You also specify the resources that you have available for each activity in the action plan.

To add an action plan and resources for an objective

1. Navigate to the CHAMP Planning screen, then the Objectives List view.
2. Drill down on the desired objective.
3. In the Action Plan list, add a new record, and enter information about the first activity of the action plan, as described in the following table.

Field	Description
Name	Enter a name for the activity.
Description	Enter a description of the activity.

Field	Description
Type	Enter the type of activity, such as customer visit.
Assigned To	The person who created this activity is automatically entered in this field.
Status	Choose a value to indicate the progress of the activity.
Due	Enter the date on which this activity is due.
Priority	Select a value that indicates the importance or urgency of this activity.
Planned Start	Enter the planned start date of the activity.
Planned Completion	Enter the planned completion date of the activity.
Actual Start	When a user begins working on this activity, the user enters the date in this field.
Actual Completion	When a user completes this activity, the user enters the date in this field.
% Complete	When users work on the plan, they can indicate how close this activity is to being completed.
Account	Select the account that is related to this activity.
Programs/ Other Comments	Optionally, enter materials, equipment, any program participation information, or other miscellaneous comments.
Last Name	Optionally, enter the last name of the contact related to this activity.
First Name	Optionally, enter the first name of the contact related to this activity.
Associated Cost	Optionally, enter the amount of money needed for this activity.
Campaign	Optionally, select a campaign that is associated with this activity.
Fund Request	Optionally, select a fund request associated with this activity.
Site	The location of the selected account.

Field	Description

4. In the Resources list, enter the resources from the following table that you have available for this activity in the Resources form.

Field	Description
Last Name	Enter the last name of the person who works on this activity.
First Name	Enter the first name of the person who works on this activity.
Job Title	Enter the job title of the person who works on this activity.
External Organization	Enter the organization of the person who works on this activity, if it is not in your own organization.
Email	Enter the email address of the person who works on this activity.
Work Phone #	Enter the work phone number of the person who works on this activity.
Home Phone #	Enter the home phone number of the person who works on this activity.
Alias	Optionally, enter an alias for the person who works on this activity.

Adding Notes to the Plan

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

You can add notes when you are creating a plan or when working on the plan after it has been approved. Notes let you enter free text comments about the plan. There are two types of notes:

- **Private Notes.** These are notes that can be seen only by the person who created the note. These notes are used to record miscellaneous information about the plan for your own use.
- **Shared Notes.** These are notes that can be seen by everyone in your company who has access to that view and record. These notes are used to share miscellaneous information about the plan.

To add notes to a plan

1. Navigate to the CHAMP Planning screen, then the Plans List view.
2. Select the appropriate plan list and drill down on the name of the plan to which you want to add a note.

3. Navigate to the Plan Notes view.
4. Add a new record to either the Shared Notes or the Private Notes list.
5. Enter the note in the new record's fields, as described in the following table.

Field	Description
Created	The date when the note was created is entered automatically.
Note Type	Enter the type of the note. For example, it might be "Directions" or "Reference."
Note	Enter the text of the note.

Approving the Plan Internally and Publishing It to the Partner

After a partner plan is created, discuss and approve it internally. You can then publish the plan to the partner company, and the partner can view it through the Siebel PRM Portal.

To publish a plan to a partner company

1. Navigate to the CHAMP Planning screen, then the Plans List view.
2. In the record for the partner plan that you want to publish, select the Publish to Partner check box.

   When this check box is selected, the partner can see the plan on the Siebel PRM Portal.

Approving the Plan Jointly with the Partner

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

After the plan is published, the partner company can access the plan through the Siebel PRM Portal and can change the action plan by adding new activities, deleting activities, changing the start dates of activities, and so on.

If the partner company has no objections to the plan, it can immediately approve the plan by using the Siebel PRM Portal to select Jointly Approved in the Status field.

If the partner company has made changes to the plan, your company and the partner company must review the plan jointly, to make changes that are necessary to make it acceptable to both. Once both companies have approved the plan, you can change its status to Jointly Approved.

To change a plan's status to Jointly Approved using the Siebel PRM Manager

1. Navigate to the CHAMP Planning screen, then the Plans List view.
2. In the Status field of the plan, select Jointly Approved.

Use the following procedure to change a plan's status to Jointly Approved using the Siebel PRM Portal.

To change a plan's status to Jointly Approved using the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the CHAMP Planning screen.

2. In the Plans list, in the Status field of the appropriate plan, the partner selects Jointly Approved.

Executing the CHAMP Plan

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

After the plan has been jointly approved, your company and the partner company can execute the plan.

You can analyze and evaluate the performance of your partner companies while the plan is being executed and after the plan is completed.

Evaluating Partner Performance

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

One of the powerful aspects of CHAMP planning is that it allows you to analyze and measure partner performance against the targets set in the partner plans.

While the plan is being executed, you can view the plan periodically to review the partner company's performance. The partner company can also check its performance during the plan period. If the actual values are not on track to reach the target values, the problem can be corrected.

After the plan is completed, you review the partner's performance thoroughly, taking action to correct problems and rewarding good performance.

You evaluate the partner's performance by comparing the values in the Actual Quantity and the Actual Amount fields with the target values that you entered when you created the objective as part of the partner plan.

After the end date for the plan, you can manually enter the actual values. You can also automate the entry of actual values using workflow rules or business services. For example, a workflow could be written to populate to the actual values based on transactional data such as opportunities, service requests, orders, and so on.

For example, if a partner has a revenue objective of $20 million during the plan period of fiscal year 2005, then Siebel Business Process Designer can be configured so that, at the end of the plan period, it adds the revenues associated with all the opportunities this partner closed during the year and enters this computed revenue in the Actual Value field for this objective.

You can also evaluate performance by comparing the performance of different partners. For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

To evaluate partner performance across multiple partners

1. Navigate to the CHAMP Planning screen, then the Performance Across Partners view.
2. As shown in the following table, choose values in the fields of the Plan Objectives list to view the performance of your partners. When a combination of criteria is selected, you see objectives that meet these criteria.

Field	Description
Metric	Allows you to choose objectives for a particular metric or the metrics for which there are associated objectives.

Field	Description
	The Performance On a Metric chart and the Performance Over Time chart are valid only if you choose a metric here.
Partner	Allows you to choose objectives for a particular partner or the partners in your portfolio for which you have a partner plan.
Plan	Allows you to choose objectives for a particular partner plan or all partner plans.
Plan Period	Allows you to choose objectives for a particular plan period or all plan periods.

3. Navigate to one of the following views:
   - **Performance Over Time**, which displays the performance of your partners across different plan periods for both quantity and amount metrics.
   - **Performance On a Metric**, which displays the performance of your partners over different metrics for both quantity and amount metrics.
4. Use the following procedure to evaluate partner performance for an individual partner.

To evaluate partner performance for an individual partner

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner you want to evaluate.
3. Navigate to the Partner Performance view.
4. As described in the following table, choose values in the fields of the Objectives list to view your partner's performance. When a combination of criteria is selected, you see objectives that meet these criteria.

Field	Description
Metric	Allows you to choose objectives for a particular metric or the metrics for which there are associated objectives. The Performance On a Metric and the Performance Over Time charts are valid only if you choose a metric here.
Partner	Allows you to choose objectives for a particular partner or the partners in your portfolio for which you have a partner plan.
Plan	Allows you to choose objectives for a particular partner plan or all partner plans.
Plan Period	Allows you to choose objectives for a particular plan period or all plan periods.

5. Navigate to one of the following views:

- Performance Over Time, which displays the performance of your partners across different plan periods for both quantity and amount metrics.
- Performance On a Metric, which displays the performance of your partners over different metrics for both quantity and amount metrics.

To display charts evaluating Partner Performance

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner whose performance you want to evaluate.
3. Navigate to the Partner Performance view.
4. Navigate to Performance Over Time.
5. In the Performance Over Time (Amount) or the Performance Over Time (Quantity) views, use the lists to choose the time periods for which you want to display a chart and the type of chart you want to display.

   Charts are displayed showing the partner's performance during the time period as measured by an amount metric or by a quantity metric.
6. Navigate to the Performance On a Metric chart, and in the Plan Objectives list, click the lists to choose the metric, the partner, the plan, and the plan period for which you want to measure performance.
7. In the Performance On a Metric (Amount) or the Performance On a Metric (Quantity) views, use the lists to choose the chart you want to display.

   Charts are displayed showing the partner's performance against this metric for an amount metric or for a quantity metric.

Reviewing Partner Performance

This task is a step in *Process of Using the Siebel PRM CHAMP Planning Module*.

After the CHAMP plan has been completed, you conduct a thorough review of the partner company's performance. You can see how it performed by comparing the actual values with the target values. You might also want to compare that partner with other partners on similar metrics, to see which partners are performing the best.

You can take the following actions based on your evaluation:

- For nonperforming partners, you can make changes in future action plan items to make them more feasible, you can recommend corrective actions to the partner, or you can take some other corrective action, such as giving the partner more training.
- Performing partners can be rewarded. For example, you could increase their market development funds (MDFs), give them more opportunities, give them awards or recognize them for a job well done, or reward them in some other way.

After you have finished working on an initiative and you have evaluated its success, you can start a new planning cycle by creating new initiatives. Your reviews of the partners' performance and of the initiative's performance help you plan the next initiative more successfully.

8 Sharing Data with Partners

Sharing Data with Partners

This chapter describes how to share different types of data with partners using Siebel PRM. It covers both transactional data and master data. It includes the following topics:

- *About Transactional and Master Data*
- *Sharing Transactional Data with Partners*
- *Process of Sharing Master Data with Partners*

About Transactional and Master Data

Siebel Business Applications include two different types of data, which you work with in different ways:

- **Transactional Data.** This is data that users can create, read, edit, and delete, such as opportunities, accounts, contacts, and service requests. It can be assigned to individuals, groups of individuals (such as a sales team), or to organizations.
- **Master (or Referential) Data.** This is data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

This chapter has a separate topic on how to work with each of these two types of data, because they are assigned differently. For more information on making transactional and master data visible to users, see *Siebel Security Guide* .

Sharing Transactional Data with Partners

In Siebel PRM, you can assign opportunities, accounts, contacts, service requests, activities, and other forms of transactional data either to partner organizations or to individual partner employees.

How the data is assigned determines its visibility. For example:

- If you assign an opportunity to the partner organization, it is visible in the All Opportunities view for that organization, but it is not visible in the My Opportunities view for any individual.
- If you assign an opportunity to an individual partner employee, it is visible to that person in the My Opportunities view.

Because it is difficult to keep track of individual partner employees, many brand owner companies prefer to assign transactional data to partner organizations. If you use this method, the partner company must give one of its employees the responsibility of looking for new data in the All Opportunities view and the other "All" views, and assigning this new data to the appropriate employee.

Many of the tasks in this chapter require you to use the All Across Organizations views. Channel managers have these views in the standard configuration of Siebel PRM. If you do not have these views, you do not have the appropriate responsibilities in Siebel PRM. Ask your system administrator to assign you the appropriate responsibilities.

The following topics provide general information about sharing transactional data with partners. Subsequent chapters provide specific information about sharing data to manage sales, manage service, manage marketing, and manage market development funds (MDFs).

The tasks in the following topics assume that you have set up the organization structure so each partner company is in an organization of its own. If you have set up multiple partner companies as subdivisions of a single organization, you generally assign transactional data to an individual and not to an organization. If you assigned these items to an organization rather than an individual, they would become visible to all partner companies because they are visible to all divisions that are members of that organization. In general, to avoid conflict, you do not want to have the same opportunity, account, contact, or service request available to more than one partner company.

Assigning Opportunities to a Partner

You can assign opportunities to partner employees just as you assign opportunities to your own salespeople, manually or using the Siebel Assignment Manager to create rules that automatically assign opportunities to partner employees. You can use Assignment Manager to set up rules for assigning opportunities based on territory, potential revenue, industry segment, and other criteria.

For example, a software company might get many inquiries from people who want to buy its midmarket products through its Web site. If that company does not sell midmarket products directly, it can use Assignment Manager to distribute these opportunities to reseller partners based on geography.

Partner employees can also enter opportunities themselves, which are visible to your company as well as the partner.

The opportunity you assign to a company as a whole appears in the All Opportunities view when the partner accesses Siebel PRM through the Web, but does not appear in the My Opportunities view for any individual. An employee at the partner company who has access to the All Opportunities view must assign the information to an individual.

The employee who enters the opportunity is automatically added to the sales team and defaulted as the primary on the sales team. The primary on the sales team can only be changed by the primary's manager. For more information about assigning opportunities to partners, see *Managing Sales with Siebel PRM* For more information about working with opportunities, see the chapter on opportunities in *Siebel Applications Administration Guide* . For more information about the Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Note: If you want to view the opportunity in the Partner Operations screen, you must assign the opportunity to the partner organization. You can also assign it to an individual.

To assign opportunities to a partner employee manually

1. Navigate to the Opportunities screen, then the Opportunities List, and the All Opportunities Across Organizations view.
2. In the Opportunities list, select the opportunity you want to assign to the partner.
3. In the opportunity form, click the Multiple Select button for the Sales Team Field.

   The Sales Team Members dialog box appears.
4. Add a new record to the list.
5. Select the partner employee you want to assign the opportunity, and click OK.
6. In the Sales Team Members dialog box, click OK.

   The partner employee is added to the Sales Team list. This partner employee can now view this opportunity in the My Opportunities view.

Use the following procedure to manually assign opportunities to a partner company.

To assign opportunities to a partner company manually

1. Navigate to the Opportunities screen, then the Opportunities List, and the All Opportunities Across Organizations view.
2. In the Opportunities list, select the opportunity you want to assign to the partner.
3. In the opportunity form, click the Multiple Select button for the Organization field.
   The Organizations dialog box appears.
4. In the Organizations dialog box, add a new record to the list.
5. In the Add Organizations dialog box, select the organization you want to assign the opportunity, and click OK.
   This partner organization can now view this opportunity in the All Opportunities view.

Use the following procedure to work with the opportunities of a partner.

To work with the opportunities of a partner

- Modify an opportunity record by selecting a field and changing the information.
- Delete a record by selecting it and then selecting Delete Record from the menu.

Viewing a Partner's Opportunities

In some industries, partners develop opportunities, and the brand owner company views these leads, either to follow up on the leads or to review how well they are progressing. Even if your company develops opportunities and assigns them to partners, you can view the opportunities to see how they are progressing. For example, by looking at the partner activities for each opportunity.

When you view opportunities, you can use the audit trail to track changes in the opportunity. By default, whenever a change is entered in the Sales Stage, Opportunity Status, or Expected Revenue field, the audit trail creates a record of how the value was change stamped with the login of the employee who made the change and the time the change was performed.

The record is stamped with the employee login and the time when the change was performed.

You can view partner opportunities two ways:

- **The Partner Operations screen.** All partner companies are listed on the Partner Operations screen. Anyone at the brand owner company with access to this screen can select a partner company record and display all its opportunities. This screen displays only opportunities that have the partner organization on their organization team; it does not display opportunities that have been assigned to individual partner employees but not to the partner organization.
- **The Opportunities screen.** The Opportunities screen displays different sets of opportunities records in different views. In My Opportunities view, it displays opportunities only if you are in the sales team. In the All Opportunities view, it displays opportunities if your organization is in the organization team. In the All Opportunities Across Organizations view, it displays all opportunities for all partner companies.

In either situation, you can drill down on an opportunity to view more information about it, if you have access to the opportunity detail view.

It is usually easiest to use the Partner Operations screen to display the opportunities of a partner company.

To view all the opportunities of a partner company

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose opportunities you want to view.
3. Navigate to the Opportunities view.

   The partner's opportunities appear.

Assigning Service Requests to a Partner

Customers often have service requests that one of your partners is most qualified to handle. You might receive the service request through your call center, and then find that a partner is best qualified to handle it.

You can assign service requests to partner employees manually, or you can use Siebel Assignment Manager to create rules that automatically assign service requests to the appropriate partner employee.

You can use Assignment Manager to decide which of your employees or your partner's employees is best able to handle a service request by scoring them on the basis of product expertise, territory, and many other criteria. Assignment Manager sums the scores for all the criteria and assigns the service request to the employee with the highest score.

For example, a large air conditioning manufacturer might rely on third-party technicians to service its products. Service requests come in through the manufacturer's call center, and the manufacturer can use Siebel Assignment Manager to assign the service requests to partner technicians based on the partner's location and expertise.

If you have set up a partner company as the only division in its organization, you can assign a service request to the organization instead of to a specific employee.

The service request assigned in this way appears in the All Service Requests view when partners access Siebel PRM through the Web, but it does not appear in the My Service Requests view for any individual. A person at the partner company who has access to the All Service Requests view must assign the service request to an employee.

Employees of partner companies can also enter service requests themselves on behalf of customers, and these are visible to your company as well as to the partner company. For more information about working with service requests, see the chapter on service requests in *Siebel Applications Administration Guide* . For more information on the Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

> **Note:** Because a service request has only one owner, it is automatically visible in the Partner Operations screen under the owner's company. You do not have to explicitly assign the service request to the partner organization to make it visible in the Partner Operations screen.

To assign service requests to a partner employee manually

1. Navigate to the Service screen, then the Service Request List, and the All Service Requests Across Organizations view.
2. In the Service Requests list, select the service request you want to assign to the partner.
3. In the form for the service request, click the Single Select button of the Owner field.

   The Pick Service Request Owner dialog box appears.
4. Select the record for the partner employee you want to assign the service request, and click OK.

   This partner employee can now view this service request in the My Service Requests view.

Use the following procedure to assign a service request to a partner company.

To assign a service request to a partner company

1. Navigate to the Service screen, then the Service Request List, and the All Service Requests Across Organizations view.
2. In the Service Requests list, drill down on the service request you want to assign to the partner.
3. In the More Info form for the service request, click the Multiple Select button in the Organization field.

   The Pick Organization dialog box appears.
4. Select the record for the organization you want to assign the service request, and click OK.

   This partner organization can now view this service request in the All Service Requests view.

To work with the service requests you have assigned to a partner

- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it and then selecting Delete Record from the menu.

Viewing Partner Service Requests

In some business models, the partners receive and log service requests, which you can view for tracking purposes. For example, if a partner is a value-added reseller, customers who need service go directly to the partner, with whom they already have a business relationship.

You can view partner service requests in two ways:

- **The Partner Operations screen.** All partner companies are listed on the Partner Operations screen. Anyone at the brand owner company with access to this screen can select a partner company record and display all its service requests.
- **The Service screen.** The Service screen displays different sets of service request records in different views. In the My Service Requests view, it displays service requests only if you are the owner. In the All Service Requests view, it displays service requests if your organization is in the organization field. In the All Service Requests Across Organizations view, it displays all service requests for all partner companies.

To view the service requests of a partner company

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose service requests you want to see.
3. Navigate to the Service Requests view.

   The partner's service requests appear.

Assigning Customer Accounts to a Partner

Your partners must have information about your customers to sell or provide service to them. You assign customer accounts to partners in order to give them this information. Employees of a partner company can also add new accounts themselves, and these added accounts are visible to you as well as to the partner company.

If you assign a customer company to a partner organization rather than to an individual partner employee, the assigned account appears in the All Accounts view when partners access Siebel PRM through the Web, but does not appear in the My Accounts view for any individual. An employee at the partner company who has access to the All Accounts view must get the information and assign it to an employee. For more information about working with accounts, see the chapter on accounts in *Siebel Applications Administration Guide* .

Note: If you want to view the account in the Partner Operations screen, you must assign the account to the partner organization. You can also assign it to an individual.

To assign a customer account to a partner employee

1. Navigate to the Accounts screen and the Accounts Administration view.
2. In the Accounts list, select the account you want to assign to the partner.
3. In the account form, click the Multiple Select button for the Account Team field.
4. Add a new record to the list.
5. Select the record for the partner employee to whom you want to assign the account, and click OK.

   The Account Team Members dialog box appears, with the partner employee added to the list.
6. In the Account Team Members dialog box, click OK.

   This partner employee can now see this account in the My Accounts view.

Use the following procedure to assign a customer account to a partner company.

To assign a customer account to a partner company

1. Navigate to the Accounts screen, then the All Accounts Across Organizations view.
2. In the Accounts list, drill down on the name of the account you want to assign to the partner.
3. In the More Info view, click the Multiple Select button for the Organization field.

   The Organizations dialog box appears.
4. Add a new record to the list.
5. Select the organization of the partner company to which you want to assign the account, and click OK.

   The Organizations dialog box appears, with the partner organization added to the list.
6. In the Organizations dialog box, click OK.

   This partner can now see this account in the All Accounts view.

Use the following procedure to view all the accounts of a partner company.

To view all the accounts of a partner company

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose accounts you want to see.
3. Navigate to the Accounts view.

   A list of the partner's accounts appears. This list includes accounts that have been assigned to the partner organization; it does not include accounts that have been assigned to partner employees but not to the partner organization.

Use the following procedure to work with the customer accounts of a partner.

To work with the customer accounts of a partner

- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it and then selecting Delete Record from the menu.

Assigning Contacts to a Partner

Your partners need information about your contacts at your customers in order to sell or provide service to them. You can provide this information by assigning contacts at your customer accounts to partners. Employees of partner companies can also add new contacts, and these added contacts are visible to you.

If you assign a contact to a partner organization rather than to an individual partner employee, this contact appears in the All Contacts view when partner employees access Siebel PRM through the Web, but does not appear in the My Contacts view for any employee. Someone at the partner company who has access to the All Contacts view must assign the contact to an employee. For more information about working with contacts, see the chapter on contacts in *Siebel Applications Administration Guide* .

Note: You cannot use the Contacts view of the Partners screen to assign contacts to a partner. Use this screen to enter your own business contacts at the partner company.

To assign a contact to a partner employee

1. Navigate to the Contacts screen, then the Contacts List, and the All Contacts Across Organizations view.
2. In the Contacts list, drill down on the name of the contact you want to assign to the partner.
3. In the More Info form for the contact, click the Multiple Select button for the Contact Team field.

   The Access List dialog box appears.
4. Add a new record.

   The Add Employees dialog box appears.
5. Select the partner employee you want to assign to the contact and click OK. You can also select multiple employees and click OK to add them all to the access list.
6. In the Contact Team dialog box, click OK.

Use the following procedure to assign a contact to a partner company.

To assign a contact to a partner company

1. Navigate to the Contacts screen, then the Contacts List, and the All Contacts Across Organizations view.
2. In the Contacts list, drill down on the name of the contact you want to assign to the partner.
3. In the More Info form, click the multi-select button in the Organization field.
4. Choose the partner organization, and click OK.

Use the following procedure to work with the contacts of a partner.

To work with the contacts of a partner

- Modify a record by selecting a field and changing the information.

- Delete a record by selecting it and selecting Delete Record from the menu.

Assigning Activities to a Partner

Managers can assign activities to employees and view their activities. A channel manager at the brand owner company can assign activities to partners in the same way that managers assign activities to employees of their own company. Partners can also add activities that are visible to their channel manager at the brand owner company.

Depending on your company's business model, you can assign activities to partner employees or just view the activities that they enter. For more information about working with activities, see the chapter on activities in *Siebel Applications Administration Guide* .

Note: Generally, you do not use the Activities view of the Partner screen to assign activities to partners. This view is generally used to enter your own activities for your work with the partner company.

To assign an activity to a partner employee

1. Navigate to the Activities screen, then the Activity List, and the All Activities view.
2. If you want to create a new activity to assign to the partner employee, in the Activities list, add a new record and enter the details of the activity. If you want to assign an existing activity to the partner employee, in the Activities list, select the activity.
3. In the form for the activity, click the Multiple Select button of the Employees field.
4. Add a new record.
5. In the Add Employees dialog box, select the partner employee to whom you want to assign the activity, and click OK.

   The employee is added to the list of employees.
6. In the Employees dialog box, click OK.

Use the following procedure to work with the activities of a partner.

To work with the activities of a partner

- Track a partner employee's activities by doing a query on the Employees field to display that employee's activities. Then, you can sort on the Due field to display the activities in chronological order.
- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it and selecting Delete Record from the menu.

Viewing a Partner's Quotes

Partner employees enter quotes in Siebel PRM through the Web. Partner relationship managers at the brand owner company can see quotes that partner employees have created in the same way they see quotes their own employees have created.

The Siebel PRM Manager's Partner Operation screen lets you view all the quotes of a partner company. For more information about working with quotes, see *Siebel Applications Administration Guide* .

To view the quotes of a partner employee

1. Navigate to the Quotes screen, then the List, and the All Quotes Across Organizations view.
2. In the Quotes list, query on the Sales Team field for the login name of the partner employee whose quotes you want to see.

   All the quotes for that partner employee appear.

Use the following procedure to view the quotes of a partner company.

To view the quotes of a partner company

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose quotes you want to see.
3. Navigate to the Quotes view.

   A list of the partner's quotes appears. Quotes are listed here if they are assigned to the partner organization; they are not listed here if they are assigned to a partner employee but not to the partner organization.

Assigning an Order to a Partner Employee

In some industries, it is common for the brand owner company to get orders from customers and then assign them to a partner for fulfillment, outsourcing all or part of the order. For example, if a bank is providing a mortgage for a customer, it might outsource the appraisal request to a partner. You can assign an order to a partner employee or to a partner company.

In other industries, partners get orders from customers. The partner relationship managers at the brand owner company can see all of the orders at a partner company.

To assign an order to a partner employee

1. Navigate to the Sales Orders screen, then the List, and the All Sales Orders Across Organizations view.

   You can also navigate to the Service Orders screen, then the List, and the All Service Orders Across Organizations view.
2. In the Sales Orders list, select the record for the order you want to assign.
3. In the More Info form for the record, click the Multiple Select button for the Sales Rep field.

   The Order Team Members dialog box appears.
4. Add a new record.

   The Add Employees Dialog box appears.
5. Select the partner employee to whom you want to assign the order and click OK.

   The employee is added to the Order Team Members dialog box.
6. In the Order Team Members dialog box, click OK.

   The order is visible to this partner employee in the My Orders view.

Use the following procedure to assign an order to a partner company.

To assign an order to a partner company

1. Navigate to the Sales Orders screen, then the List, and the All Sales Orders Across Organizations view.
   You can also navigate to the Service Orders screen, then the List, and the All Service Orders Across Organizations view.
2. In the Sales Orders list, drill down on the name of the order you want to assign.
3. In the More Info form for the record, click the Multiple Select button for the Organization field.
   The Organizations dialog box appears.
4. Add a new record.
   The Add Organizations Dialog box appears.
5. Select the organization of the partner company to which you want to assign the order and click OK.
   The organization is added to the Organizations dialog box.
6. In the Organizations dialog box, click OK.
   The order is visible to this partner organization in the All Orders view.

Use the following procedure to view the orders of a partner company.

To view the orders of a partner company

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose orders you want to view.
3. Navigate to the Orders view.
   A list of the partner's orders appears. This list includes orders that have the partner organization assigned to the order; it does not include orders that have partner employees assigned to them but do not have partner organizations assigned to them.

Assigning Assets to Partners

Field service businesses use the Assets screen for tracking and managing assets, which can be installed at customers' locations or can be stored at their own warehouses and inventory locations.

Users can select an asset in the Assets screen and navigate to the different views to view the service requests, entitlements, warranty, components, uptime data, repairs, preventive maintenance, and other information for this asset, providing the field service business with information used for preventive maintenance, repairs, billing, and marketing.

You can enter this information about assets using either the Siebel PRM Manager or Siebel Field Service. Your partners can view it using the Siebel PRM Portal.

Because only one partner company provides field service for a given asset, you can assign an asset to only one organization. Employees of that organization can then see the asset in the All Assets view.

If a partner employee owns a service request, that partner employee can view the asset associated with the service request only if the employee has access to the All Assets view. For more information about working with assets, see *Siebel Field Service Guide* .

For a business scenario illustrating how brand owners and partners can work together using assets, see *Example of the Partner Responding to Service Requests for Assets*.

Note: For the asset to be visible to the partner, the asset's organization must match the partner's organization. When you are upgrading to a new version, assets might be assigned to the default organization, while partner contacts remain part of the partner organization. If so, the partner contacts are not able to see the assets.

To assign an asset to a partner company

1. Navigate to the Assets screen, then the List view.
2. In the Assets list, drill down on the name of the asset that you want to assign to the partner company.
3. In the More Info form, in the Organization field, click the Single Select button.
4. In the Pick Organization dialog box, select the organization of the partner company and click OK.

   The asset and the information associated with it are visible to users in this partner company in the All Assets view.

Assigning Inventory to Partners

Field service businesses use the Inventory screen to manage parts through their life cycles and to monitor parts consumption during order fulfillment and field service. Mobile field service engineers also use the Inventory screen to manage their trunk inventories using a disconnected client.

The Inventory screen lists locations where inventory is stored. Users can select a location and navigate to the different views to display the product inventory for the location, pending orders, vendors, and other information, and can also use one view to generate orders.

You can enter this information about inventory and generate orders using either the Siebel PRM Manager or Siebel Field Service. Your partners can view this information and generate orders using the Siebel PRM Portal.

You can use the Position field of the Inventory Location record to assign the record to one person, who would see it in the My Inventory Locations view. In general, you assign the record to a manager at the brand owner company in this way.

To share inventory with partners, assign an inventory location to a partner organization. Employees of that partner company can then see it in the All Inventory Locations view. For more information about working with inventory, see *Siebel Field Service Guide* .

For a business scenario illustrating how brand owners and partners can work together using assets, see *Example of the Brand Owner and Partner Managing Inventory*.

To assign an inventory location to a partner company

1. Navigate to the Inventory screen, then the Inventory Locations view.
2. In the Inventory Locations list, select the location that you want to assign to the partner company.
3. In the form for the inventory location, in the Organization field, click the Multiple Select button.
4. In the Organizations dialog box, click the New button.
5. In the Add Organizations dialog box, select the organization of the partner company and click OK.
6. In the Organizations dialog box, click OK.

   The Inventory location and the information associated with it are visible to users in this partner company in the All Inventory view.

Sharing Files with Partners

You can share files with your partners. For example, you can give them a copy of a report you have written about an opportunity or get a copy of a report they have written.

Both the brand owner and partner company can share files by attaching the files to opportunities or fund requests. Both can also view or delete an attachment to an opportunity or fund request.

Do not add an attachment to the partner's record in the Partner screen to share a file with the partner. Attachments to partner records are purely for your own use in managing these partners. To share attachments with a partner, you must add the attachments to opportunities, service requests, or fund requests that the partner can access.

To add an attachment to an opportunity assigned to a partner employee

1. Navigate to the Opportunities screen, then the Opportunities List, and the All Opportunities Across Organizations view.
2. In the Opportunities list, drill down on the name of an opportunity you have assigned to the partner employee.
3. To make sure you have assigned that opportunity to a partner:
    - Click the Multiple Select button of the Sales Team field

      The Team members dialog box appears, and it must include the partner employee's name. If it does not, find an opportunity that does include the partner on the team, and add the attachment to that opportunity.
    - Close the Team members dialog box.
4. Navigate to the Attachments view to view attachments for that opportunity.
5. In the Attachments list, add a new record.
6. In the new record, click the Single Select button in the Attachment Name field.
7. In the Add Attachment dialog box, click Browse next to the File Name text box.
8. Browse to select the file you want, and click Open.
9. In the Add Attachment dialog box, add a record.

Use the following procedure to add an attachment to a Market Development Fund request.

To add an attachment to a Market Development Fund request

1. Navigate to the Fund Requests screen, and select the All Fund Requests.
2. Drill down on the name of a fund request of the partner company. The company's name must appear in the Partner field.
3. Navigate to the Fund Request Attachments view to display attachments for that fund request.
4. In the Attachments list, click New File.
5. In the new record, click the Single Select button in the Attachment Name field.
6. In the Add Attachment dialog box, click Browse next to the File Name text box.
7. Browse to select the file you want, and click Open.
8. In the Add Attachment dialog box, add a record.

Process of Sharing Master Data with Partners

Master data is assigned to groups of employees rather than to individual employees. It is most common to assign the following types of master data to your partners:

- **Literature.** These are documents used to sell or understand your products, such as sales brochures and technical background information.
- **Solutions.** These are answers to common service requests.
- **Training Courses.** These are courses administered through the Administration - Training screen.
- **Products.** These are the goods or services that you sell.
- **Price Lists.** These are the prices you charge this partner for the goods or services that you sell.

In addition, auction items, competitors, decision issues, events, resolution items, and response templates can also be assigned to categories.

For most master data, visibility is controlled by using catalog visibility. This mechanism lets you categorize master data into catalogs. The value in the catalog's Type field must be *Partner* for the catalog to be visible in the Siebel PRM Portal.

You control visibility to these catalogs using access groups, which are groups of different parties in your Siebel environment. Partner communities are a type of access group that you use to group partners, so you can give groups of partners access to the same catalogs of master data. For example, you might have a catalog specifically for Partner Literature, and you might give all partner communities visibility to this catalog. You might have a catalog for a specific product line, such as a catalog of all literature, solutions, products, and training courses related to your line of server products. You might put all resellers who sell your line of server products into one partner community, so you can give this group of partners visibility to this server catalog.

You can also create public catalogs, which have no visibility restrictions, to provide master data visibility to unregistered users and individual partners.

To assign most types of master data to partners, you add the partner company to the appropriate access group. Make sure your channel operations manager has set up the appropriate access groups and categories of master data. Then, any partner company that you add to the access group has access to all the master data in the categories visible to that access group.

The exception is price lists, which are usually assigned to smaller groups of partner companies than other types of master data. For example, you might assign master data to an access group called Resellers, but you might have a different price list for each reseller, or you might have a standard price list for most resellers but special price lists for five of your resellers. Assigning price lists to access groups would limit the utility of the access groups, because price lists often do not follow the same rules as other master data. For more information about master data, categories, and user groups, see *Siebel Security Guide* .

To assign master data to partners, perform the following tasks

1. *Creating Categories and Access Groups*
2. *Adding Partner Companies to Access Groups*
3. *Adding Master Data to Categories*
4. *Assigning Price Lists to Partner Companies*

In addition, when you produce new master data, such as new sales brochures, you must add them to the appropriate category to make them visible to your partners.

Creating Categories and Access Groups

This task is a step in *Process of Sharing Master Data with Partners*.

Before partner managers assign any master data to partner companies, the channel operations manager or system administrator must analyze the way you need to share master data with your partners and create the appropriate categories and access groups.

Though most of the work of setting up catalogs and access groups is done when you first set up Siebel PRM, you can add catalogs and access groups at any time. Some examples of when you would add them are as follows:

- If you start a new product line, you would probably want to add a new catalog or to add new categories to an existing catalog for information about that product line.
- If you restructure your partner program, you might have to rework your system of access groups completely.

You would also want to continuously add information to catalogs as more data is created and made available. For example, you would need frequent updates to catalogs as you create new FAQs and new product data sheets or brochures. For more information on creating categories and access groups, see *Setting Up Siebel PRM*

Adding Partner Companies to Access Groups

This task is a step in *Process of Sharing Master Data with Partners*.

After categories and access groups have been set up properly, you assign a partner company to the appropriate access group to give it visibility to all the master data associated with that access group.

For example, you might have access groups for resellers, value added resellers, service providers, and system integrators. If you form a new partnership with another service provider, you associate it with the appropriate access group to give it visibility to your sales literature, training courses, and other master data that service providers need. You do this when you first enroll the new partner in your partner program and create a Partner record.

Partner communities are the type of access group used specifically to group partner companies. It is useful to have partner communities, because you can identify which access groups are used to manage partners and which are used for other purposes. When Siebel PRM users add access groups, it is recommended that they use partner communities.

If you add a new partner program, for example, if you introduce a new product to a select group of resellers, you would create new partner communities so you can give these partners access to the information they need about the product. These partners would probably still belong to the same partner communities as before, but they would also belong to this new one in order to get access to specific information about this new product they are reselling.

You might create several new groups for resellers of this product line, named Authorized, Silver, Gold, and Platinum. Each group would have access to different data sets. You could also use the inheritance rules to set up these groups hierarchically. For example, if you are in the Platinum group you see everything that Gold sees plus the information specific to your group; if you are in the Gold group, you see everything Silver sees plus the information specific to your group; if you are in the Silver group, you see everything authorized resellers see plus the information specific to your group. Inheritance rules give you flexibility in modeling relationships among groups.

If you do not know which access group to use, ask the partner operations manager who set up access groups in your company.

To add a partner company to an access group

1. Navigate to the Administration - Partner screen, then the Registered Partners view.

2. In the Partners list, drill down on the name of the partner company that you want to add to a community and navigate to the Access Groups view.
3. In the Access Groups list, add a new record.
4. In the Add Access Groups dialog box, select the group or groups to which you want to add the partner. If necessary, use queries to find these groups, and add a record.

Adding Master Data to Categories

This task is a step in *Process of Sharing Master Data with Partners*.

Using access groups allows you to assign new master data to partner companies. For example, when you create a new sales brochure, you just have to associate it with the appropriate category. If categories and access groups have been set up correctly, the brochure is visible to all your partners who are in access groups associated with that category.

For example, when you come out with a new datasheet for a new version of an existing product, or when you introduce a new product line and build a new catalog about that product line, you would perform the following process tasks:

- If you are creating a new catalog for the new data, ask your channel operations manager to help you set up the new catalog structure and to associate it with the appropriate access groups. To add master data, you must understand the structure of access groups and categories that the partner operations manager has set up.
- Create the new master data content, such as new literature or new solutions.
- After the content is finished, add it to the Siebel database by navigating to the appropriate screen (for example, the Literature or Solutions screen) and adding a new record for the content file. If you are adding a whole catalog, you would add multiple items on each screen and categorize the items as you add them.
- Add each item to the correct category, by either navigating to the Category view in the screen where you added the item or by navigating to the Administration - Catalog screen, displaying the correct category, and adding the item. (If you are associating existing master data with categories, it is generally easier to use the Administration - Catalog screen. If you are creating new master data content, it is generally easier to use the Administration - Catalog screen, Category view where you added the data.) All of the partners in partner groups associated with these categories have visibility to the data.

The following two procedures show how to associate literature with a category. You associate other types of master data in exactly the same way, using the other views instead of the Literature view or using other screens instead of the Literature Administration screen.

To associate literature with a category using the Catalog Administration screen

1. Navigate to the Administration - Catalog screen.
2. In the Catalogs list, drill down on the name of the catalog that contains the category with which you want to associate the literature to drill down into that catalog.

   A Categories list appears that contains that category.
3. Select the Category with which you want to associate literature.
4. Navigate to Literature.
5. In the Literature list, add a new record.

   The Add Literature dialog box appears.
6. If necessary, enter criteria for a search and click Go.
7. Select the literature item that you want to associate with the category, and click OK.

   The literature is associated with the category.

Use the following procedure to associate literature with a category using the Literature Administration screen.

To associate literature with a category using the Literature Administration screen

1. Navigate to the Administration - Document screen, then the Literature view.
2. In the Literature list, add a new literature item, or select the record for the literature you want to associate with a category.
3. Navigate to the Category view.
4. In the Category list, add a new record.

   The Add Category dialog box appears.
5. Select the category with which you want to associate the literature, and click OK.

   The literature is associated with the category.

Assigning Price Lists to Partner Companies

This task is a step in *Process of Sharing Master Data with Partners*.

In order for a partner to access your company's products, you must assign it a price list as well as a buying catalog.

Buying catalogs are catalogs that contain products you sell. They are set up in the same way as other catalogs, which were discussed earlier in this chapter. For example, you can give different internal divisions and partners access to different buying catalogs in the same way that you give them access to different literature catalogs. A buying catalog must have the value "Buying" in the Catalog Type field.

> **CAUTION:** If you do not set the Catalog Type to Buying, users are able to see products in the InfoCenter and All Product Lists view, but the Catalog screen is empty.

Buying catalogs do not contain prices. Price lists are stored separately from buying catalogs to give you greater flexibility. You could use this flexibility in several ways, for example:

- All resellers of a certain product line might have access to the same catalog; you put them all in the same access group, and you give the group access to the catalog. However, you might give resellers a discount that is determined by sales volume, so each reseller needs a different price list.
- All resellers of a certain product line might have access to the same catalog and to the same price list. In this situation, there are no volume discounts and no special deals. Regardless of what product lines you sell, you pay the same price.

Price lists must contain prices for every product; products are visible only if they are included in the price list as well as in the catalog. Each partner must be assigned a price list; you can assign the same price list to multiple partners, or assign a unique price to each partner if necessary. For more information about creating pricing models and price lists, see *Siebel Pricing Administration Guide* .

To assign a price list to a partner organization

1. Make sure the price list to be assigned has already been created in the Siebel PRM Manager or some other Siebel Business Application.
2. Navigate to the Administration - Partner screen, then the Registered Partners view.
3. In the Registered Partners list, drill down on the name of the partner company for which you want to assign a price list.
4. Navigate to the Price Lists view.

The Price Lists list appears.

5. In the Price Lists list, add a new record.

   The Add Price Lists dialog box appears.

6. Select the price list you want to assign to the company, and click OK.

   The Price Lists list appears with the price list that you selected added to it.

9 Managing Sales with Siebel PRM

Managing Sales with Siebel PRM

This chapter describes examples that illustrate different ways that you can use Siebel PRM to manage sales. It also describes tools that Siebel PRM provides to help you manage sales. It includes the following topics:

- *About Managing Sales with Siebel PRM*
- *Examples for Partner-Led Sales*
- *Examples for Collaborative Selling*
- *Opportunity Management Workflows*
- *Examples for Forecasting Partner Revenue*
- *Examples of Partners Forecasting Their Revenue Without the Brand Owner Viewing Forecasts*
- *Using Presentations and Proposals*

About Managing Sales with Siebel PRM

This chapter describes examples of how you might use Siebel PRM to manage sales. It is not comprehensive; it simply gives you an idea of the many ways that Siebel PRM can be used. The sales examples fall into the following categories:

- **Partner-led sales.** Partner sales agents work on opportunities generated by either the partner or brand owner company.
- **Collaborative sales.** Partners and the brand owner work on opportunities together.

This chapter includes examples illustrating how the brand owner and partner can work together. For information about how partners can work with other partners, see *Partner-to-Partner Collaboration*.

In addition to these sales examples, this chapter describes these tools that are useful in managing sales:

- **Forecasting.** You have several ways of forecasting partners' sales, and this chapter provides forecasting examples.
- **Presentations and Proposals.** You can create templates for presentations and proposals, which your partners can use to generate specific sales presentations and proposals.

Examples for Partner-Led Sales

The partner works on the opportunities in the following examples:

- *Example of Brand Owner Creating Opportunities and Assigning Them to Partners*
- *Example of Brand Owner Creating Opportunities and Transferring Them to Partners*

- *Example of Partners Creating and Working on Opportunities*

Example of Brand Owner Creating Opportunities and Assigning Them to Partners

This topic gives one example of how partners work with opportunities. You might use this feature differently, depending on your business model

In this example, opportunities are created by the brand owner company and assigned to specific partners.

This example applies to you if you generate opportunities through your marketing campaigns and you can clearly determine which partner follows up on each opportunity, for example, because each partner specializes in a different geographical territory or in a different product line.

This example consists of the following tasks:

- *Entering Opportunities (Brand Owner)*
- *Assigning Opportunities to Partners (Brand Owner)*
- *Working on the Opportunity (Partner)*
- *Tracking the Opportunity (Brand Owner)*

Entering Opportunities (Brand Owner)

You can gather opportunities in a number of different ways, for example, at trade shows, through marketing campaigns, or through your Web site. The first step in working with an opportunity is to enter it into your Siebel Business Application. When you enter an opportunity, you are automatically added to the sales team as the primary.

If opportunities have already been entered in another application, you can import them into your Siebel Business Application using Siebel Enterprise Integration Manager (EIM) or Siebel Business Application Integration (EAI). For example, you might get opportunities through a Web site that stores them in another format, and then import them into the Siebel PRM Manager. For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide* . For more information about EAI, see *Overview: Siebel Enterprise Application Integration* . For more information about working with opportunities, see the chapter on opportunities in *Siebel Applications Administration Guide* .

To enter a new opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, add a new record to that list.
3. Enter information about the opportunity in the new record.

Assigning Opportunities to Partners (Brand Owner)

Next, assign the opportunities to the appropriate partner. You can do this manually, but it is generally better to use Siebel Assignment Manager to assign the opportunity by creating rules based on partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

For example, you might assign all opportunities in Illinois for one of your product lines to a partner who is located there and has expertise in that product line.

You can assign opportunities to partners in two ways:

- **Assign opportunities to the partner company.** To assign an opportunity to a partner company, enter that company's organization in the Organization field of the Opportunity record. The opportunity is visible in the All Opportunities view for that organization, but it is not visible in the My Opportunities view for any employee of

the organization. The partner company must designate a person who has visibility to the All Opportunities view to find these new opportunities and assign them to the appropriate employee.

- **Assign opportunities to partner employees.** To assign an opportunity to a partner employee, you enter the employee's name in the Sales Team field of the Opportunity record. The opportunity is visible in the My Opportunities view for that employee.

You can either assign the opportunities manually, or you can set up Assignment Manager to assign them automatically. Assignment Manager can add partner organizations to the opportunity's Organization field or add partner employees to the opportunity's Sales Team field. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Working on the Opportunity (Partner)

After the opportunity has been assigned, partner employees work on it using the Siebel PRM Portal:

- If the opportunity was assigned to a partner employee, that employee is on the sales team and can see the opportunity in the My Opportunities view.
- If the opportunity was assigned to a partner organization, it appears in the All Opportunities view, but it does not appear in the My Opportunities view of any employees until partner employees are added to the sales team.

As partner employees work on an opportunity, they update information about that opportunity. For example, they might update activities related to the opportunity, create proposals and presentations for the opportunity, create quotes for the opportunity, and update contacts for that opportunity.

As partner sales agents learn more about the opportunity and get a clearer sense of the deal size, they can update the revenue items associated with the opportunity. The expected revenue, sales stage, and probability fields of the revenue record give you crucial information about the opportunity. For more information about opportunities and revenue, see *Siebel Applications Administration Guide* .

To add a revenue item to an opportunity using the Opportunities screen of the Siebel PRM Portal (partner)

1. In the Siebel PRM Portal, the partner navigates to the Opportunities screen.
2. In the Opportunities list, the partner drills down on the name of the opportunity to which revenue line items are added.
3. The partner navigates to the Revenues view.
4. In the Revenues list, the partner adds a new record.
5. In the new record, the partner enters information about product, quantity, price, type, and probability.
6. The revenue field is calculated automatically based on values in the price and quantity fields.
7. In the Revenues list, the partner navigates to the menu button, and clicks Update Opportunity.
8. The Revenue and Expected Revenue fields of the opportunity are updated.

Use the following procedure to add a revenue item to an opportunity using customer quotes in the Siebel PRM Portal.

To add a revenue item to an opportunity using customer quotes in the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Opportunities screen, then the Opportunities List view.
2. The partner drills down on the name of the Opportunity record upon which the quote is based.
3. The partner navigates to the Quotes view, and in the Quotes list, the partner adds a new record.
4. The partner enters information about the new quote including the name of the quote, the price list that used for the quote, order terms, shipping terms, billing details, and shipping details. The prices from the price list that is selected are entered automatically for the items that are selected.
5. The partner can see the new quote in the Quotes list.

6. The partner drills down on the quote record that was just created.
7. In the Line Items list, the partner adds a new record.
8. In the new Line Item record, the partner enters the product, quantity, and other information.
9. The partner continues to add new line items, until the line items for the quote are added.
10. In the Quotes list, the partner clicks Update Opportunity.
11. The opportunity is updated with information from the line items of the quote. The revenues associated with the quote and the opportunity reflect prices from the selected price list.

Tracking the Opportunity (Brand Owner)

You can track a partner's progress on opportunities by displaying the opportunities, looking at the activities attached to them, and looking at the status field of each opportunity to see if the sale has been closed.

Because you created the lead in this example, you are automatically the primary on the sales team. You can drill down on the opportunity record to view detail information about the lead. If you were not on the opportunity sales team, you could view this record in the Partner Operations screen, but you could not drill down into the opportunity record and view details.

Note: The Partner Operations screen displays opportunities if the partner company is listed in the Organization field.

To track a partner company's opportunities

1. Navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose opportunities you want to see.
3. Navigate to the Opportunities view.

   The partner's opportunities appear.
4. Drill down on the name of an opportunity.

   The Opportunity form appears.
5. Navigate to the different views to display information associated with that opportunity, such as revenues and activities.

Example of Brand Owner Creating Opportunities and Transferring Them to Partners

This topic gives one example of how partners work with opportunities. You might use this feature differently, depending on your business model

All the other examples in this chapter assume that you are working with partners who use the Siebel PRM Portal. However, you can also share opportunities with partners who do not use the Siebel PRM Portal by using opportunity transfer to move opportunity data to the partner's customer relation management (CRM) system.

The brand owner can initiate the opportunity transfer. After the opportunity has been transferred, the brand owner can send updates to the partner that update the opportunity in the partner's system, and the brand owner can query the partner's system to receive updated information about the opportunity.

If the partner uses Siebel PRM or some other CRM system that supports opportunity transfer, the partner can also initiate an opportunity transfer, and then send updates to the brand owner's system, or query the brand owner's system to receive updates.

This business example for using opportunity transfer is similar to *Example of Brand Owner Creating Opportunities and Assigning Them to Partners*. It also applies to you if you generate opportunities through your marketing campaigns and you can clearly determine which partner follows up on each opportunity. However, it is appropriate when you are working with large partners who have their own CRM systems and do not use the Siebel PRM Portal.

This example shows how to transfer opportunities and send and receive updates manually. In practice, a brand owner can use Siebel Business Process Designer to automate the processes of transferring opportunities to partners and of sending and receiving updates.

This example consists of the following tasks:

- *Setting Up ASIs for Opportunity Transfer (Brand Owner)*
- *Entering an Opportunity and Transferring It to a Partner (Brand Owner)*
- *Working on the Opportunity (Partner)*
- *Tracking the Opportunity (Brand Owner)*

Setting Up ASIs for Opportunity Transfer (Brand Owner)

Opportunity transfer uses Siebel's Application Services Interfaces (ASIs) to synchronize your Siebel database with the partner's CRM system.

Before you can transfer opportunities, you must set up the appropriate ASIs. There are three ASIs used for opportunity transfer, one to initiate the opportunity transfer data, one to send updates to the partner's system, and one to query the partner's CRM system to receive updates. For more information on setting up ASIs, see *Setting Up Application Services Interfaces for Siebel PRM*

Entering an Opportunity and Transferring It to a Partner (Brand Owner)

The brand owner gathers and enters information about the opportunity in the same way described in the previous example, *Example of Brand Owner Creating Opportunities and Assigning Them to Partners*. However, after entering the data, the brand owner navigates to the Transfer Opportunity button, rather than assigning ownership of the opportunity to a partner company or partner employee.

To enter a new opportunity

1. Navigate to the Opportunities screen, then the List view.
2. In the Opportunities list, add a new record to that list.
3. Enter information about the opportunity in the new record.
4. In the Organization field for the new record, select the partner organization.
5. Drill down on the name of the new opportunity.
6. Navigate to the Transfer view.
7. In the Transfer form, click Transfer.

   A list of partners appears, including all partners who are set up for opportunity transfer.
8. Select the partner to whom you want to transfer the opportunity, and click OK.

   The opportunity is transferred, and the Transfer Status field is updated with a value that specifies whether the transfer was successful.

Working on the Opportunity (Partner)

After the opportunity has been transferred, partner employees work on it in the same way they would work on any opportunity in their CRM system.

When the opportunity is transferred, all the contacts, revenues, notes, and activities associated with it are also transferred to your partner's CRM system, and converted to the data used in that system. For example, if your partner's system uses the word "lead" instead of "opportunity," the opportunity appears to the partner as a Lead record.

Tracking the Opportunity (Brand Owner)

You can track a partner's progress on opportunities by using opportunity transfer to query the partner's CRM system and to update the opportunity record and related information back in the Siebel PRM Manager.

For example, if the partner's CRM system supports equivalent data, you can look at the Activity records attached to the opportunity, and look at the status field of each opportunity to see if the sale has been closed. If the partner has updated the revenue associated with the opportunity, you can use the Revenue record in your forecasting.

You can receive an update from a partner only if you already transferred the opportunity to the partner or if the partner transferred the opportunity to you.

To query the partner's database to update an opportunity

1. Navigate to the Opportunities screen.
2. In the Opportunities list, select an opportunity that has been transferred to a partner.
3. Navigate to the Transfer view.
4. In the Transfer form, click Receive Update, and click OK to confirm the action.

   Siebel PRM Manager queries the partner's system for an update of the opportunity.

Example of Partners Creating and Working on Opportunities

This topic gives one example of how partners work with opportunities. You might use this feature differently, depending on your business model. In this example, opportunities are created by the partner company and logged by the partner company for tracking purposes. Using the Siebel PRM Portal, sales agents at the partner company can enter opportunities they develop, share these opportunities with other agents at the partner company, and track the opportunities as they work on them. Using the Siebel PRM Manager, the channel manager at your company can also track the opportunities' progress at partner companies.

This example consists of the following tasks:

- *Entering Opportunities (Partner)*
- *Sharing Opportunities (Partner)*
- *Tracking Opportunities (Partner)*
- *Tracking Opportunities (Brand Owner)*

Entering Opportunities (Partner)

In this example, your partners develop new opportunities and enter them into the Siebel system using the Siebel PRM Portal. When a partner enters an opportunity, the partner is automatically added to the Sales Team field as primary and the partner organization is automatically added to the Organization field.

To enter a new opportunity through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Opportunities screen.
2. In the Opportunities list, the partner adds a new record.

3. The partner enters information about the opportunity in the new record.

Sharing Opportunities (Partner)

Optionally, if the partner sales agent who entered the opportunity thinks that other sales agents at the partner company can help work the opportunity, then the agent can share the opportunity with the other agents by adding them to the Sales Team field. By default, the partner sales agent who added the record is the primary on the sales team.

The partner sales agents on the sales team see the opportunity whenever they display the My Opportunities view, and they can modify the opportunity record as they work on the opportunity. For more information about opportunities, see *Siebel Applications Administration Guide* .

To share an opportunity with other partner sales agents

1. In the Siebel PRM Portal, the partner navigates to the Opportunities screen.
2. In the Opportunities list, the partner selects the opportunity to be shared.
3. In the form for the opportunity, the partner clicks the Multiple Select button of the Sales Team field.

   The Sales Team Members dialog box appears.
4. In the Sales Team Members dialog box, the partner adds desired employees to the sales team.
5. In the Sales Team Members dialog box, the partner reviews the list to make sure that the individuals who belong on the sales team are listed. Then, the partner clicks OK.

Tracking Opportunities (Partner)

Just as sales managers at your own company use Siebel Sales to track their direct reports' progress on opportunities, managers at the partner company can use the Siebel PRM Portal to display the opportunities their direct reports have entered and track their progress on them.

To display your reports' opportunities

- In the Siebel PRM Portal, the partner navigates to the Opportunities screen, then the My Team's Opportunities view.

  Opportunities that have the manager on the sales team or one of the manager's reports as the primary on the sales team appear.

Tracking Opportunities (Brand Owner)

Although your company does not develop or work opportunities in this example, your channel managers can display the opportunities for the partner companies that they manage, in order to track each partner company's progress in selling your products.

In this example, the channel manager does not see detail information about the opportunity. To see detail information, the channel manager must be on the sales team for the opportunity. To make detail information visible, you can set up Siebel Assignment Manager to automatically add the channel manager to the sales team when a partner creates an opportunity, as described in the next example.

To view the opportunities of a partner company

1. In the Siebel PRM Manager, navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose opportunities you want to see.
3. Navigate to the Opportunities view.

   The partner's opportunities appear.

Examples for Collaborative Selling

The following topics look at three examples of how partners work on sales opportunities in collaboration with the brand owner:

- *Example of Brand Owner Creating Opportunities and Brand Owner and Partner Working Together on Them*
- *Example of Partner Creating Opportunities and Brand Owner and Partner Working Together on Them*
- *Example of Partner Creating Opportunities and Assigning Them to Brand Owner*
- *Example of a Customer Transferring a Shopping Cart From the Brand Owner's Web Site to a Partner*

Example of Brand Owner Creating Opportunities and Brand Owner and Partner Working Together on Them

This topic gives one example of how partners work on opportunities in collaboration with the brand owner. You might use this feature differently, depending on your business model

In this example, opportunities are created by the brand owner company and assigned to specific partner sales agents who work collaboratively on the opportunity with your sales agents.

This example is appropriate for you if you generate opportunities and you use partners' help in following up on opportunities. For example, you might generate opportunities through a national marketing campaign, and when you follow up on these opportunities, you might need help from partners who specialize in training or in systems integration.

This example consists of the following tasks:

- *Entering the Opportunities (Brand Owner)*
- *Assigning Opportunities to Brand Owner Sales Agents (Brand Owner)*
- *Assigning Opportunities to Partners (Brand Owner)*
- *Working Together on Opportunities (Brand Owner and Partner)*

Entering the Opportunities (Brand Owner)

You might gather opportunities in a number of different ways, for example, at trade shows, through marketing campaigns, or through your Web site. The first step in working with an opportunity is to enter it into your Siebel Business Application.

When you enter an opportunity through the Siebel PRM Manager, you are automatically added as the primary on the sales team. For more information about opportunities, see the chapter on opportunities in *Siebel Applications Administration Guide* .

To enter a new opportunity

1. Navigate to the Opportunities screen, then the Opportunities List view.
2. In the Opportunities list, add a new record.
3. Enter information about the opportunity in the new record.

Assigning Opportunities to Brand Owner Sales Agents (Brand Owner)

After you enter the opportunity, it must be assigned to the appropriate sales agent at your company. To assign an opportunity to a sales agent, you enter the employee's name in the Sales Team field of the Opportunity record. The opportunity is then visible in the My Opportunities view for that employee.

You can assign the opportunity manually, but it is best to use Siebel Assignment Manager to assign the opportunity by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Assigning Opportunities to Partners (Brand Owner)

Next, opportunities are assigned to the appropriate partner. You can do this manually or use Siebel Assignment Manager to assign the opportunity by creating rules based on partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

You can assign opportunities to partners in two ways:

- **Assign opportunities to the partner company.** To assign an opportunity to a partner company, you enter that company's organization in the Organization field of the Opportunity record. The opportunity is visible in the All Opportunities view for that organization, but it is not visible in the My Opportunities view for any employee of the organization. The partner company must designate an employee to find new opportunities in the All Opportunities view and assign them to the appropriate employee.
- **Assign opportunities to partner employees.** To assign an opportunity to a partner employee, you enter the employee's name in the Sales Team field of the Opportunity record. Then the opportunity is visible in the My Opportunities view for that employee.

You can either assign the opportunities manually, or you can set up Assignment Manager to assign them automatically. Assignment Manager can add partner organizations to the opportunity's Organization field or add partner employees to the opportunity's Sales Team field.

It is usually difficult for you to keep track of the special skills of individual employees in partner companies, so it is more common to assign the opportunity to the partner company and have someone there assign it to the appropriate employee. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Working Together on Opportunities (Brand Owner and Partner)

It is easier for you and the partner to work together on the lead, because both are on the sales team.

Whenever you display the My Opportunities view in the Siebel PRM Manager or the partner displays the My Opportunities view in the Siebel PRM Portal, the shared opportunity is included in the list. You can select the Opportunity record and do the following:

- **Share files.** You and the partner can share files (such as Microsoft Word documents) that are useful for this opportunity by navigating to the Attachments view and adding records to the Shared Attachments list.
- **Share activities.** You and the partner can log your activities as you work on this opportunity by navigating to the Activities view and adding records to the Activities list. You are always current about each other's activities. You can also add future activities to the Activities view or add activity plans to the Activity Plans view for this opportunity, in order to invite other members of the sales team to work on these activities.
- **Share notes.** You and your partner can share notes by adding activities to the opportunity and choosing the Note activity type.

- **Share revenue line items.** As the partner sales agents learn more about the opportunity, they can add to it revenue line items, which indicate the potential revenue, chance of success, and sales stage. These are visible to both partner companies.
- **Create customized sales tools.** You can use the brand owner's prebuilt proposal, presentation, and correspondence templates to create proposals, presentations, and letters based on this opportunity, giving you selling tools that are automatically customized for this opportunity and account.

Example of Partner Creating Opportunities and Brand Owner and Partner Working Together on Them

This topic gives one example of how partners work on opportunities in collaboration with the brand owner. You might use this feature differently, depending on your business model

In this example, opportunities are created by the partner companies, and the partners then call for help from sales agents at the brand owner company, so they can work in a joint selling effort.

This example is appropriate for you if your partners generate opportunities and need help working on the opportunity. For example, your partners might generate opportunities by attending trade shows, and when they follow up on these opportunities, they might need help from your sales agents who have special product knowledge.

This example consists of the following tasks:

- *Using Assignment Manager to Add Brand Owner Employees to the Sales Team (Brand Owner)*
- *Entering Opportunities (Partner)*
- *Working Together on Opportunities (Brand Owner and Partner)*

Using Assignment Manager to Add Brand Owner Employees to the Sales Team (Brand Owner)

To make it easier to work with your partner, set up Siebel Assignment Manager so it automatically adds the appropriate employees from your company whenever partners enter new opportunities. You would probably want to add the following employees from your company:

- **Channel manager.** Add the channel managers who are responsible for the partner companies that entered each opportunity, so they can track the opportunities. Because the channel managers are on the sales team of the opportunities generated by the partner companies they work with, they can track these opportunities by displaying the My Opportunities view.
- **Sales agents.** Add the appropriate sales agents to work with the partner sales agent who entered the opportunity. Assignment Manager can choose which of your sales agents to add to each opportunity based on your agents' location, product expertise, workload and availability, and other criteria.

For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Entering Opportunities (Partner)

Partners develop new opportunities and enter them into the Siebel PRM Portal. When a partner enters the opportunity, that partner is automatically added to the sales team as primary.

You can set up Siebel Assignment Manager so the channel manager and appropriate sales agents at the brand owner company are also added to the sales team automatically when the partner enters the record. Alternatively, the partner can assign the opportunity to these people manually.

To enter a new opportunity through the PRM Portal

1. Navigate to the Opportunities screen.
2. In the Opportunities list, the partner adds a new record to that list.
3. The partner enters information about the opportunity in the new record.
4. The opportunity can be assigned to appropriate sales agents manually or automatically as follows:
    - The partner can assign the opportunity to appropriate sales agents at the partner company and to the channel manager at the brand owner company by adding these people to the Sales Team field manually. Then, the channel manager would add sales agents at the brand owner company to the sales team.
    - You can set up Siebel Assignment Manager to add these people to the Sales Team field automatically.

Working Together on Opportunities (Brand Owner and Partner)

Having both your sales agents and partner sales agents on the sales team makes it easier to work together on the opportunity.

Whenever your sales agent displays the My Opportunities view in the Siebel Business Application or the partner displays the My Opportunities view in the Siebel PRM Portal, this opportunity is included in the list. Both your agents and your partner can select the Opportunity record and do the following:

- **Share files.** You and the partner can share files (such as Microsoft Word documents) that are useful for this opportunity by navigating to the Attachments view and adding records to the Shared Attachments list.
- **Share activities.** You and the partner can log the activities you have done to work on this opportunities by navigating to the Activities view plan and adding records to the Activities list. You and the partner are always up to date about each other's activities. You can also add future activities to the Activities view or add activity plans to the Activity Plans view for this opportunity, in order to invite other members of the sales team to work on these activities.
- **Share notes.** You and your partner can share notes by adding activities to the opportunity and choosing the Note activity type.
- **Share revenue line items.** As the partner sales agents learn more about the opportunity, they can add to it revenue line items, which indicate the potential revenue, chance of success, and sales stage. These are visible to both partner companies.
- **Create customized sales tools.** You can use the brand owner's prebuilt proposal, presentation, and correspondence templates to create proposals, presentations, and letters based on this opportunity, giving you selling tools that are automatically customized for this opportunity and account.

Example of Partner Creating Opportunities and Assigning Them to Brand Owner

This topic gives one example of how partners work on opportunities in collaboration with the brand owner. You might use this feature differently, depending on your business model

In this example, opportunities are created by the partner companies and assigned to employees of the brand owner company.

This example is appropriate for your company if your partners generate opportunities for you and you follow up on each opportunity. For example, your partners might generate opportunities by attending trade shows, and your company might follow up on these opportunities through your national sales force.

This example consists of the following tasks:

- *Entering the Opportunities (Partner)*
- *Assigning Opportunities to Brand Owner Sales Agents (Brand Owner)*
- *Notifying Sales Agents (Brand Owner)*
- *Working On the Opportunities (Brand Owner)*
- *Tracking opportunities (Brand Owner)*

Entering the Opportunities (Partner)

In this example, your partners develop new opportunities and enter them using the Siebel PRM Portal.

When partner sales agents enter the opportunity, they are automatically added to the sales team as primary. Though the partner sales agents remain on the sales team, they do not work on this opportunity.

To enter a new opportunity through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Opportunities screen.
2. In the Opportunities list, the partner adds a new record.
3. The partner enters information about the opportunity in the new record.
4. The partner assigns the opportunity to the brand owner company by adding a brand owner organization in the Organization field.

   The opportunity are visible to everyone in that brand owner organization who can display the All Opportunities view.

Assigning Opportunities to Brand Owner Sales Agents (Brand Owner)

Next, you assign opportunities to the appropriate sales agent in the brand owner company. Use Siebel Assignment Manager to assign each opportunity by creating rules based on the employee's special skill, product lines, geography, or other criteria. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Notifying Sales Agents (Brand Owner)

Optionally, you can notify the sales agent by email when an opportunity is assigned. You set up rules in Siebel Business Process Designer so it sends the email using the communication server when the rules are satisfied.

As with partners, you can notify the employee only when important opportunities are assigned. For example, you can create a workflow rule saying that email is sent when an opportunity is assigned that involves sales of over $200,000.

Working On the Opportunities (Brand Owner)

Once the opportunity has been assigned to a sales agent at the brand owner company, the employee can view it in Siebel Sales or another Siebel Business Application by displaying the My Opportunities view. Because Siebel products use the same database, you do not have to export this record from Siebel PRM to Siebel Sales.

To view a new opportunity

1. Navigate to the Opportunities screen, then the Opportunities List view.

2. Drill down on the name of the new opportunity in the Opportunities list and navigate to the appropriate views to view more details about the opportunity.

Tracking opportunities (Brand Owner)

As your employees work on these opportunities, you can track their progress using the Siebel PRM Manager.

To track an employee's opportunities

1. Navigate to the Opportunities screen, then the Opportunities List, and the My Team's Opportunities view.
2. Use a Query to search for the employee.
3. Drill down on the name of an opportunity you want to track, and navigate to the Revenues and Activities view.

   The revenue items and activities attached to that opportunity appear.

Example of a Customer Transferring a Shopping Cart From the Brand Owner's Web Site to a Partner

This topic gives one example of how partners work on opportunities in collaboration with the brand owner. You might use this feature differently, depending on your business model

Shopping cart transfer is used by companies that want to make sales through their own Web site but that want distributors, authorized resellers, or other partners to fulfill the orders. The customer can use Siebel Sales on your Web site to create a shopping cart. Then, the customer can transfer the shopping cart to a partner's site for fulfillment.

> **Note:** For this process to work properly, the same product must exist on both the brand owner and the partner site, with the same Part Number and the same Price. If the price is different, the Siebel Business Application uses the price from the partner site in the order.

This example consists of the following tasks:

- *Setting Up a Web Site to Sell to Customers (Brand Owner)*
- *Making a Purchase at the Brand Owner's Web Site (Customer)*
- *Fulfilling the Order (Partner)*

Setting Up a Web Site to Sell to Customers (Brand Owner)

Before customers can use shopping cart transfer, the brand owner must:

- Set up a Web site to sell products or services to customers.
- Set up the Application Services Interface (ASI) for shopping cart transfer.

In this example, the brand owner creates the Web site where customers make purchases. Partners who fulfill orders do not need to use Web sites to sell to customers.

The brand owner can set up this Web site using Siebel Sales. For more information, see *Siebel eSales Administration Guide* .

Shopping cart transfer uses Siebel's ASI to integrate the brand owner's and the partner's order systems. The partner does not need to use the Siebel PRM Portal to track and fulfill orders.

For information about setting up the ASI for shopping cart transfer, see *Setting Up Application Services Interfaces for Siebel PRM*

Making a Purchase at the Brand Owner's Web Site (Customer)

Customers make purchases at this Web site as they would at any Web site, by browsing the catalog and adding items to the shopping cart. The Web site displays an approximate price for the products or services they are ordering.

When they are ready to buy, customers click the Transfer Cart button and choose the partner who fulfills the order. Then they see the exact price that partner charges for their order.

To make a purchase using shopping cart transfer

1. The customer browses the catalog at the brand owner's Web site and adds products or services to the shopping cart.
2. The customer navigates to Transfer Cart.

   A list of partners who can fulfill the order appears.
3. The customer selects a partner to fulfill the order.

   A screen appears to allow the customer to confirm the order, with the exact price that the selected partner charges.
4. The customer confirms the order.

Fulfilling the Order (Partner)

After the shopping cart is transferred, it appears as an order in the partner's order management system. The partner company fulfills this order as it would any other order.

Opportunity Management Workflows

With any of the preceding examples that involve the brand owner and partner sharing opportunities, you can use the Siebel PRM opportunity management workflows to send email notification to the brand owner or partner employee who is assigned the opportunity and to that employee's manager when certain conditions are met.

The following opportunity management workflows are available:

- Opportunity Assigned Notification Process
- Opportunity Pending Notification Process
- Opportunity Inactive Notification Process
- Opportunity Pending Notification Process
- Opportunity Lost Notification Process
- Opportunity Won Notification Process

For more information about these workflows, see the topics about opportunity workflows in *Siebel Applications Administration Guide* .

Before you can use them, you must activate these workflows, as described in *Activating Workflows for Siebel PRM*.

Examples for Forecasting Partner Revenue

Forecasting lets you monitor the sales pipeline to predict future sales. When salespeople enter opportunities, they specify the total possible revenue and probability of success for that opportunity, which is the basis of forecasting.

By using the forecasting module, analysts at the brand owner company can define a forecast series covering virtually any example. They can specify the partners, accounts, products, opportunities, and other data to be included in the forecast series. Then, both brand owners and partners can use the predefined forecasting series to create forecasts of future revenues. For more information about forecasting, see *Siebel Forecasting Guide* .

Partner Forecasting lets you give forecasting credit to partners in multiple ways. You can give credit to a partner if that partner is the primary organization in the Organization field using the [Opportunity Primary Organization] search specification. You can also give credit to a partner if a partner employee is the primary on the opportunity sales team by using the [Sales Rep Organization] search specification. If you want to give credit to all partner organizations, you can give credit to partners who are the primary organization in the Organization field by using the [Opportunity Primary Organization Partner Flag] search specification. Alternatively, you can give credit to the partner organizations in which the primary sales representative works for a partner organization by using the [Partner] search specification. To support the last alternative, the Partner field must be completed on revenue line items to be included in the forecast.

The following topics provide examples that are specific to partner forecasting. Brand owners can forecast partner revenue and partners can forecast their own revenue. Administrators at the brand owner company can set up forecast series in different ways to automate forecasts, limit visibility, and allow modifications of forecasts at each level of the forecast.

The following topics provide examples of different ways in which the brand owner can forecast partner revenue:

- *Example of the Brand Owner Creating a Direct Annual Forecast of Revenue for One Partner Organization*
- *Example of the Brand Owner Creating a Rollup Forecast of Annual Revenue for a Partner Organization*
- *Example of the Brand Owner Forecasting Revenue for All Partners that a Partner Manager Oversees*

Example of the Brand Owner Creating a Direct Quarterly Forecast of All Partner Revenue

This topic gives one example of how the brand owner forecasts partner revenue. You might use this feature differently, depending on your business model

In this example, only one person at the brand owner company, typically the channel manager, creates a forecast.

The forecast series in this example covers quarterly revenues that have been committed where a partner employee is the primary on the sales team or the partner organization is the primary in the Organization field. Forecasts would be run once every month.

This example consists of the following tasks:

- *Creating the Forecast Series*
- *Creating the Forecast*

Creating the Forecast Series

Before running a forecast, you must create the forecast series. The forecast series defines forecasts covering all committed, quarterly partner revenue.

To create the forecast series

1. Navigate to the Administration - Forecast screen.
2. In the Forecast Series list, add a new record.
3. Enter the values in the following table in the fields of the new record.

Field	Description
Series Name	A name for the forecast, such as Channel Manager's Quarterly Partner Forecast.
Auto Forecast Search Spec	([Partner] is not NULL or [Opportunity Primary Organization Partner Flag] = 'Y') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'
Active	checked
Description	A description of the forecast, such as Channel Manager's Quarterly Partner Forecast - Committed.
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Month
Interval	1
Base Period Type	Quarter

4. Navigate to the Forecasts Series Dates view.
5. In the Forecast Series Dates list, add a new record.
6. Enter the values in the following table in the fields of the new record.

Field	Description
Forecast Date	The date when you want to begin running forecasts. This can be today's date.

Field	Description
Description	A description, such as Q1 Partner Forecast.
Start Date	The start date for the forecast period, such as 1/1/05.
End Date	The end date for the forecast period, such as 3/31/05.

7. To create additional forecast dates, you can select the record you just created, click the menu button, and then click Copy Record. By default, the new forecast date is one month later and the rest of the fields are the same as in the original record. Repeat this step as many times as you want; as you repeatedly copy records, the Forecast Date continues to change to later dates. Therefore, you might want to change the Start Date and End Date periods to reflect the time frames of the forecasts you want to generate.
8. Navigate to the Forecast Series Participants view, and in the Forecast Series Participants list, add a new record.

   The Add Participants dialog box appears.
9. In the Add Participants dialog box, use a query to find the channel manager, select the channel manager's record, and click OK.

Creating the Forecast

Once the forecast series has been set up, you can run the forecast.

To create the forecast

1. Navigate to the Forecasts screen.
2. In the Forecast list, add a new record.
3. In the Forecast Series field of the new record, select the forecast series you want to use, such as Channel Manager's Quarterly Partner Forecast.
4. Navigate to the Forecast Series Dates view.
5. In the Forecast Date field, click the Single Select button.
6. In the Pick Forecast Series Date dialog box, select the record with the forecast date you want and click OK.

   The forecast runs.

Example of the Brand Owner Creating a Direct Annual Forecast of Revenue for One Partner Organization

This topic gives one example of how the brand owner forecasts partner revenue. You might use this feature differently, depending on your business model

In this example, only one person at the brand owner company, typically the channel manager, creates a forecast.

For this forecast, the forecast series defines forecasts that would cover annual revenue of one specific partner (Partner X) and be run once every quarter. The forecast results would provide a running total of forecasted revenues for the year.

You create this forecast series and forecast in the same way that you do in the example *Example of the Brand Owner Creating a Direct Quarterly Forecast of All Partner Revenue*, with these exceptions:

- Because this is an annual forecast that is run on a quarterly basis, you need to set up the Forecast Series Dates accordingly.
- You enter the values in the following table in the fields of the Forecast Series record.

Field	Description
Series Name	A name for the forecast, such as Channel Manager's Annual Partner X Forecast.
Auto Forecast Search Spec	`([Sales Rep Organization] = 'Partner X' or [Opportunity Primary Organization] = 'Partner X') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'`
Description	A description of the forecast, such as Channel Manager's Annual Partner X Forecast - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Quarter
Interval	1
Base Period Type	Year

Example of the Brand Owner Creating a Rollup Forecast of Annual Revenue for a Partner Organization

This topic gives one example of how the brand owner forecasts partner revenue. You might use this feature differently, depending on your business model

In this example, partner employees whose revenues are included in the forecast can run the forecast. In the previous examples, only the channel manager could run the forecasts.

This example consists of the following tasks:

- Setting Up the Reporting Hierarchy
- Creating the Forecast Series
- Creating the Forecast

Setting Up the Reporting Hierarchy

In this example, forecasts are rolled up through the position hierarchy to the channel manager at the brand owner company. You must set up the position hierarchy so all partner employees whose revenue is included in the forecast report directly or indirectly to the channel manager at the brand owner company.

The position at the head of the partner company reporting hierarchy, the partner relationship manager, reports to the channel manager at the brand owner company. Partner sales agents whose revenue is included in the forecast report directly or indirectly to the partner relationship manager.

You can set up the positions hierarchy using the Administration - Partner Screen, Positions view. For more information about setting up the positions hierarchy, see *Siebel Applications Administration Guide* .

Creating the Forecast Series

The channel manager creates a forecast series that defines forecasts that covers annual revenue of one specific partner (Partner X) and be run once every month. If you have set up the reporting hierarchy correctly, you can create this forecast series to do a rollup forecast.

To create the forecast series

1. Navigate to the Administration - Forecast screen.
2. In the Forecast Series list, add a new record.
3. Enter the values in the following table in the fields of the new record.

Field	Description
Series Name	A name for the forecast, such as Rollup Forecast of Annual Partner X Revenue.
Auto Forecast Search Spec	`[Sales Rep Organization] = 'Partner X' and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'`
Description	A description of the forecast, such as Rollup Forecast of Annual Partner X Revenue - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	My Revenues

Field	Description
Interval Period Type	Month
Interval	1
Base Period Type	Year

4. Navigate to the Forecasts Series Dates view.
5. In the Forecast Series Dates list, add a new record.
6. Enter the values in the following table in the fields of the new record.

Field	Description
Forecast Date	The date when you want to begin running forecasts. This can be today's date.
Description	A description, such as June Rollup Forecast of Annual Partner X Revenue.
Start Date	The start date for the forecast period, such as 1/1/05.
End Date	The end date for the forecast period, such as 12/31/05.

7. If you want create additional forecast dates, you can select the record you just created, click the menu button, and then click Copy Record. By default, the new forecast date is one month later, and the rest of the fields are the same as in the original record.
8. Navigate to the Forecast Series Participants view, and in the Forecast Series Participants list, add a new record.

   The Add Participants dialog box appears.
9. In the Add Participants dialog box, query for the people in the brand owner and partner organization who would run the forecast, select these people, and then click OK.

   The positions of these people would include Channel Manager, Partner Sales Representative, Partner Sales Manager, and Partner Relationship Manager.

Creating the Forecast

Either the channel manager at the brand owner company, or any employee in the partner company who is under the channel manager in the reporting hierarchy, can run the forecast.

In order for the rollup forecast to run logically and to give employees the ability to adjust their forecasts, employees run and roll up forecasts in an order that is inversely related to their rank. The sales representative runs the forecast first, then the sales manager, then the partner relationship manager, and finally, the channel manager.

However, when managers run forecasts, Siebel PRM automatically runs their reports' forecasts, if the report has not already run the forecast.

To create the forecast

1. In the Siebel PRM Portal, partner sales representatives (employees with no reports) navigate to the Forecast screen, then the My Forecasts view.
2. The partner sales representative creates a new forecast.
3. The partner sales representative selects Rollup Forecast of Annual Partner X Revenue as the forecast series name.
4. The partner sales representative selects June Rollup Forecast of Annual Partner X Revenue as the forecast series date.
5. If the partner sales representative wants to adjust any of the revenue amounts that comprise the forecast, the partner sales representative navigates to the Details view and modifies the revenue amounts.
6. When the partner sales representative is satisfied with the forecast details, the partner sales representative clicks the Rollup button.

   The forecast is rolled up to the partner sales representative's manager, the sales manager.
7. In the Siebel PRM Portal, the sales manager repeats through Step 6, rolling up the forecast to the partner relationship manager.
8. In the Siebel PRM Portal, the partner relationship manager repeats through Step 6.
9. In the Siebel PRM Manager, the channel manager at the brand owner company repeats through Step 5.

   The channel manager's final rollup forecast includes information from all of the employees whose revenues contributed to the forecast.

Example of the Brand Owner Forecasting Revenue for All Partners that a Partner Manager Oversees

This topic gives one example of how the brand owner forecasts revenue for multiple partners. You might use this feature differently, depending on your business model

In this example, there are multiple channel managers at the brand owner organization. Each channel manager oversees partnerships with a distinct group of partner organizations.

A channel manager at a brand owner organization wants to track the revenues associated with his or her own partners, but does not want other channel managers to be able to view these forecasts. In this example, only the channel manager can see the forecast.

This example consists of the following tasks:

- Creating the Forecast Series
- Creating the Forecast

Creating the Forecast Series

The channel manager creates a forecast series that defines forecasts that would cover the annual revenue of three specific partners (Partner X, Partner Y, and Partner Z) and be run once every quarter.

To create the forecast series

1. Navigate to the Administration - Forecast screen.

2. In the Forecast Series list, add a new record.
3. Enter the values in the following table in the fields of the new record.

Field	Description
Series Name	A name for the forecast, such as Channel Manager's Annual Forecast of Partners X, Y, and Z.
Auto Forecast Search Spec	([Sales Rep Organization] = 'Partner X' or [Sales Rep Organization] = 'Partner Y' or [Sales Rep Organization] = 'Partner Z') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'
Description	A description of the forecast, such as Channel Manager's Annual Forecast of Partners X, Y, and Z - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Quarter
Interval	1
Base Period Type	Year

4. Navigate to the Forecasts Series Dates view.
5. In the Forecast Series Dates list, add a new record.
6. Enter the values in the following table in the fields of the new record.

Field	Description
Forecast Date	The date when you want to begin running forecasts. This can be today's date.
Description	A description, such as Q1 Partner X, Partner Y, and Partner Z Forecast.
Start Date	The start date for the forecast period, such as 1/1/05.
End Date	The end date for the forecast period, such as 12/31/05.

7. If you want to create additional forecast dates, you can select the record you just created, click the menu button, and then click Copy Record. By default, the new forecast date is one quarter later, and the rest of the fields are the same as in the original record. You then edit the record, for example, to change the description so it refers to the new quarter.
8. Navigate to the Forecast Series Participants view, and in the Forecast Series Participants list, add a new record.

   The Add Participants dialog box appears.
9. In the Add Participants dialog box, use a query to find the brand owner's channel manager, select this record, and click OK. In the Forecast Series form, click Save.

   Only the channel manager who was selected is able to run a forecast based on this forecast series.

Creating the Forecast

Only the channel manager at the brand owner organization can run the forecasts based on this forecast series.

After the forecast series has been set up, the channel manager can run the forecast.

To create the forecast

1. The channel manager navigates to the Forecasts screen.
2. In the Forecast list, add a new record.
3. In the Forecast Series field of the new record, the channel manager selects the forecast series to be used, such as Channel Manager's Annual Forecast of Partners X, Y, and Z.
4. In the Forecast Date field, select the forecast date.

Examples of Partners Forecasting Their Revenue Without the Brand Owner Viewing Forecasts

Previous examples focused on producing forecasts for the brand owner company, though the partner company could sometimes share the forecasts. In the following examples, forecasts are produced exclusively for the use of the partner company:

- *Example of the Channel Manager Creating a Direct Partner Forecast Series*
- *Example of Multiple Partner Employees Creating Rollup Forecasts*

Example of the Channel Manager Creating a Direct Partner Forecast Series

This topic gives one example of how the partners forecast revenue. You might use this feature differently, depending on your business model

In this example, the channel manager creates a forecast series that allows only the partner relationship manager to run a forecast of the partner's own revenue. The partner relationship manager does not share this information with the brand owner.

The steps are identical to the steps in *Example of the Brand Owner Creating a Direct Annual Forecast of Revenue for One Partner Organization*. The only difference is that instead of adding the channel manager to the Forecast Participants,

you add the partner relationship manager at the partner company. Then, only the partner company can run these forecasts of its annual revenue.

Example of Multiple Partner Employees Creating Rollup Forecasts

This topic gives one example of how the partners forecast revenue. You might use this feature differently, depending on your business model

In this example, multiple partner employees run a forecast of the partner company's revenue. The partner does not share this information with the brand owner.

The steps required for this example are identical to the steps in *Example of the Brand Owner Creating a Rollup Forecast of Annual Revenue for a Partner Organization*. The only difference is that the channel manager at the brand owner company is not included in the Forecast Series Participants list, so the brand owner does not automatically have visibility into the forecast.

Using Presentations and Proposals

Using the Siebel PRM presentation and proposal generation functionality, brand owners can standardize partners' proposals and presentations, make sure that partners are positioning brand owner products appropriately, and reduce the amount of time and money that partners spend generating new proposals or presentations. Using the proposal and presentation generation capabilities, partners can generate customized, professional proposals and presentations that reflect the most current and accurate information available, without having to write any original content themselves.

Use the Siebel PRM Manager to create templates for sales presentations and sales proposals. When your partners generate an actual presentation, proposal, or correspondence, these templates incorporate information about a specific opportunity or account.

Siebel Presentations generates Microsoft PowerPoint slide shows. You create the templates for slide shows about your products. When your partner generates a slide show, it is personalized with the customer's name or with other information that you specified when you created the template. The partner can further customize the slide show by changing the order of the slides or adding slides from the presentation library.

Siebel Proposals generates Microsoft Word documents. You create templates for typical sales proposals. When your partner generates a specific proposal, it is personalized with information from the Opportunity or Account record, and also with a quote, if it was included in the template. Your partner can customize it by changing the order of sections or adding sections from the proposal library.

Your partners do not need to have Microsoft PowerPoint or Microsoft Word installed locally to use Siebel Presentations and Proposals. Partners need these applications only if they want to edit presentations and proposals.

Your employees can use the same presentation and proposal templates as your partners.

The following scenario illustrates how you would typically create a proposal or presentation.

A sales executive at the brand owner company develops a conceptual plan for a generic template for a presentation or proposal to be standardized. The plan includes modularized sections that can be added or subtracted, depending on the nature of a specific opportunity. The proposal or presentation includes markers where fields, such as the account name, quote, product name, sales representative, contact, and so on, are to be inserted.

The sales executive's staff uses Siebel PRM Manager to create the presentation or proposal template, including bookmarks where fields are to be inserted. The staff also maps these bookmarks to fields from opportunity or account records in the Siebel database. These bookmarks are replaced by data from the account or opportunity on which the proposal is based. Finally, the staff saves the template in the presentation or proposal library. Then, partner sales agents can use the Siebel PRM Portal to generate the presentation or proposal. For more information about presentations and proposals, see *Siebel Correspondence, Proposals, and Presentations Guide* .

To generate a presentation or proposal

1. In the Siebel PRM Portal, the partner navigates to the Accounts screen.
2. The partner drills down on the name of the account on which the presentation or proposal is based.
3. The partner navigates to the Presentation or Proposal view.
4. The partner clicks Auto Presentation or Auto Proposal.

   The Siebel business application automatically selects the most appropriate presentation or proposal template for the account or opportunity and creates a new record.
5. The partner clicks Generate Draft to generate and display the presentation or proposal in Microsoft PowerPoint or Microsoft Word.
6. If the partner has the appropriate application installed locally, then the partner can drill down on the record to display the presentation or proposal in that application.

10 Managing Service Requests with Siebel PRM

Managing Service Requests with Siebel PRM

This chapter describes examples that illustrate different ways that you can use Siebel PRM to manage service requests. It includes the following topics:

- *About Managing Service Requests with Siebel PRM*
- *About Managing Customer Service Requests with Siebel PRM*
- *Examples for Partner-Led Customer Service*
- *Examples for Collaborative Customer Service*
- *Examples of Field Service with Siebel PRM*
- *About Managing Partners' Service Requests*
- *Solutions and SmartScripts with Siebel PRM*

About Managing Service Requests with Siebel PRM

This chapter describes examples that are examples of how you might use Siebel PRM to manage service requests.

You can use Siebel PRM to manage two types of service requests:

- **Customer Service Requests.** Customers sometimes log service requests that your partners are responsible for. You can refer customer service requests to partners, work on them collaboratively with partners, or track service requests that partners have logged on behalf of your customers.
- **Partner Service Requests.** Partners sometimes log service requests that you must respond to. For example, partners might have questions about your products or about the partnership, or they might need other forms of service.

These examples cover a number of methods to manage each type of service request.

To reduce the number of service requests you receive, you can create a repository of FAQs, solutions, and SmartScripts to help partners solve customers' problems and their own problems without logging service requests.

About Managing Customer Service Requests with Siebel PRM

The following topics provide two groups of examples for managing customer service requests:

- *Examples for Partner-Led Customer Service*. In these examples, the partner is responsible for responding to the service request.
- *Examples for Collaborative Customer Service*. In these examples, the brand owner and partner work together to respond to the service request.

Examples for Partner-Led Customer Service

There are two common situations where the partner responds to customer service requests:

- *Example of the Partner Receiving Service Requests and Logging Them for Tracking Purposes*
- *Example of the Brand Owner Receiving Service Requests and Assigning Them to the Partner*

Example of the Partner Receiving Service Requests and Logging Them for Tracking Purposes

This topic gives one example of how the partners respond to customer service requests. You might use this feature differently, depending on your business model

Partners might receive customer service requests directly and log them in the Siebel PRM Portal for tracking purposes. Then, partners can use the Siebel PRM Portal to manage service requests within their own organization, and at the same time, give you visibility to these service requests so you can track how well your partners are serving customers.

In this example, the partner acts as service provider on behalf of the brand owner, with no intervention from the brand owner. When customers have a problem with the product, they contact the partner with which they have a relationship.

For example, if a partner is a dealer or a value-added reseller, customers who have made purchases from the partner would call the partner directly with service requests.

Using the Siebel PRM Portal, the partner company can enter customer service requests, assign these service requests to the appropriate service agents, and track the service requests as the service agents work on them. Using the Siebel PRM Manager, the channel manager at your company can also track the progress of the service requests at partner companies.

Partners have access to a subset of the service management functionality that you have in the Siebel PRM Manager. Partners can log service requests, add activities and attachments to service requests, and associate solutions from the knowledge base with service requests.

Partners can get help in researching service requests by using the Siebel PRM Portal Solutions screen to display frequently asked questions (FAQs) and their solutions and to display troubleshooting instructions, as discussed later in this chapter. For more information about working with service requests, see the chapter on service requests in *Siebel Applications Administration Guide* .

This example consists of the following tasks:

- *Logging Service Requests (Partner)*
- *Assigning Service Requests (Partner)*
- *Fulfilling Service Requests (Partner)*
- *Tracking Service Requests (Partner)*
- *Tracking Service Requests (Brand Owner)*

Logging Service Requests (Partner)

In this example, your partners enter service requests using the Siebel PRM Portal. The partner might get these service requests through its call center or through other customer contacts.

To enter a new service request through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Service screen, then the Service Request List, and the My Customers' Service Requests view.
2. In the Service Requests list, the partner adds a new record.
3. The partner enters information about the service request in the new record.
4. Optionally, the partner entering the service request can assign it immediately by selecting a service agent in the Owner field, so the service request appears in the owner's My Service Requests view.

   If the service request is not assigned immediately, it is visible only in the All Service Requests view. The employee responsible for managing the service request queue would have to assign it later, as described in the following topic.

Assigning Service Requests (Partner)

If service requests are not assigned by the employee logging the service request, a partner employee would have the responsibility of managing the service request queue. This employee would regularly look at new service requests in the Siebel PRM Portal's All Customer Service Requests view, and would use the Owner field to assign each service request to the partner employee who is qualified to respond to it. The appropriate employee could be a service agent who contacts the customer by telephone or a field service agent who goes to the customer site.

The employee who manages the service request queue must have a responsibility that includes visibility to the All Service Requests view. For more information about using responsibilities to control visibility to views and about the responsibilities available in the seed data, see the topic about defining partner responsibilities in *Setting Up Siebel PRM*

To assign a service request to a partner service agent

1. In the Siebel PRM Portal, the partner navigates to the Service screen, then the Service Request List, and the All Customer's Service Requests view.
2. In the Service Requests list, the partner drills down on the name of the service request to be assigned.
3. In the More Info view, the partner clicks the Single Select button of the Owner field.

   The Pick Service Request Owner dialog box appears.
4. The partner selects a partner employee to be added as the owner of the service request and clicks OK.

Fulfilling Service Requests (Partner)

Partner service agents and field technicians who fulfill service requests would regularly navigate to the Siebel PRM Portal's Service screen, then the My Customers' Service Requests view. They would research and respond to new customer service requests.

Alternatively, they could be notified automatically by email whenever a new service request is assigned to them. The brand owner would set up Siebel Business Process Designer to send this email. For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

When they finish working on a service request, they change the status to closed.

Tracking Service Requests (Partner)

Managers at the partner company can use the Siebel PRM Portal to view the service requests that their direct reports own and track progress on them.

To view your report's service requests

- In the Siebel PRM Portal, the partner navigates to the Service screen, then the Service Request List, and the My Team's Customer's Service Requests view.

  The service requests owned by this partner company manager's reports appear.

Tracking Service Requests (Brand Owner)

Although your company does not develop or work on service requests in this example, your channel managers can view the service requests for the partner companies that they manage. This lets them track each partner company's progress in fulfilling service requests.

Optionally, you can also produce the Partner Operations report, which lists the service requests a partner is working on, as well as that partner's opportunities, accounts, and so on.

To view the service requests of a partner company

1. In the Siebel PRM Manager, navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose service requests you want to see.
3. Navigate to the Service Requests view.

   The partner's service requests appear.

Example of the Brand Owner Receiving Service Requests and Assigning Them to the Partner

This topic gives one example of how the partners respond to customer service requests. You might use this feature differently, depending on your business model

In this example, service requests are received and entered by the brand owner company and assigned to specific partners.

This example would be appropriate, for example, if the brand owner runs a call center where customers call to report problems with products they purchased directly from the brand owner or through a reseller. The call center agents log the service requests, which then are assigned either automatically or manually to a partner with the appropriate skills to solve the customer's problem. The partner to whom the service request was assigned retrieves the service request through the Siebel PRM Portal. This partner then assigns it either to a partner employee who is a service agent responsible for telephoning the customer, or to a partner employee who is a field service technician responsible for visiting the customer's house.

After solving the problem, the service agent changes the service request's status to closed using the Siebel PRM Portal. A service manager at the brand owner company can track the status of service requests to monitor customer satisfaction. For more information about working with service requests, see the chapter on service requests in *Siebel Applications Administration Guide* .

This example consists of the following tasks:

- *Entering Service Requests (Brand Owner)*
- *Assigning Service Requests to Partners (Brand Owner)*
- *Working on Service Requests (Partner)*
- *Tracking Service Requests (Brand Owner)*

Entering Service Requests (Brand Owner)

Your call center agents, field service representatives, or other employees who work with your customers receive service requests and enter the service requests in the Siebel Business Application that they use, which can be Siebel PRM Manager, Siebel Call Center, Siebel Service, or Siebel Field Service. Because Siebel Business Applications use the same database, these service requests are visible to you in Siebel PRM Manager even if they are entered in Siebel Call Center, Siebel Service, or Siebel Field Service.

To enter a new service request

1. Navigate to the Service screen, then the Service Request List view.
2. In the Service Requests list, add a new record.
3. Enter information about the service request in the new record.
4. Assign the service request to a partner service agent, as described in the next step.

Assigning Service Requests to Partners (Brand Owner)

Next, service requests are assigned to the appropriate partner. You can do this manually, but it is generally better to use Siebel Assignment Manager to assign the service request by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

For example, you might assign service requests from Spanish-speaking customers for one of your product lines to a partner company that has expertise in that product line and employees who speak Spanish.

You can set up Assignment Manager either to assign service requests to partner companies or to assign service requests to individuals who can be service agents at the partner company or at your own company, depending on which agent is most qualified to deal with each service request.

You can assign service requests to partners in two ways:

- **Assign service requests to the partner company.** To assign a service request to a partner company, you enter that company's organization in the Organization field of the Service Request record, which is in the More Info view. The service request is visible in the All Service Requests view for that organization, but it is not visible in the My Service Requests view for any employee of the organization. The partner must designate an employee to find new service requests in the All Service Requests view and assign them to the appropriate employee by entering the employee's name in the Owner field of the service request, in the More Info form.
- **Assign service requests to partner employees.** To assign a service request to a partner employee, you enter the employee's name in the Owner field of the Service Request record. The service request is visible in the My Service Requests view for that employee.

It is usually difficult for you to keep track of the special skills of individual employees in partner companies, so it is more common to assign the service request to the partner company and have an employee there assign it to the service

agent. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Working on Service Requests (Partner)

After the service request is assigned, the partner employees work on it using the Siebel PRM Portal, as follows:

- If the service request is assigned to a partner employee, that person is the owner of the service request and can see it in the My Service Requests view.
- If the service request is assigned to a partner organization, employees in that organization can see that service request in the All Service Requests view, but the service request does not appear in any employee's My Service Requests view until a partner employee is added in the Owner field.

When service agents resolve a service request, they change its status to Closed.

To view a service request and change its status to Closed

1. In the Siebel PRM Portal, the partner navigates to the Service screen.
2. In the Service Requests list, the partner selects the service request.
3. When the service request has been resolved, the partner selects Closed in the Status field.

Tracking Service Requests (Brand Owner)

You can track your partner's progress on its service requests by displaying the service requests and viewing the status fields to see which service requests have been closed.

To track a partner's service requests

1. In the Siebel PRM Manager, navigate to the Partner Operations screen.
2. In the Partners list, drill down on the name of the partner company whose service requests you want to see.
3. Navigate to the Service Requests view.
   The partner's service requests appear.
4. If you want to see more details about a service request, click its number in the Service Request list.

Examples for Collaborative Customer Service

The following topics describe two examples that let the partner work on service requests in collaboration with the brand owner:

- *Example of the Partner Logging Service Requests and Working on Them with the Brand Owner*
- *Example of the Partner Logging Service Requests and Transferring Them to the Brand Owner*

Example of the Partner Logging Service Requests and Working on Them with the Brand Owner

This topic gives one example of how the partners work on customer service requests in collaboration with the brand owner. You might use this feature differently, depending on your business model

In this example, the partner acts as the primary service provider but collaborates with the brand owner to get service issues resolved when the partner receives service requests that require expertise from the brand owner.

For example, you might use this example if your partner is a value-added reseller of your company's complex manufacturing equipment. Your partner's field service technicians are on site installing new equipment, and have a problem with the computer's software that require a software patch. The field service technician would log a service request in the Siebel PRM Portal's Self-Service screen to get help from the brand owner and to request the patch.

This example consists of the following tasks:

- *Logging Service Requests (Partner)*
- *Using Self-Service to Get Help (Partner)*
- *Responding to the Partner's Self-Service Request (Brand Owner)*

Logging Service Requests (Partner)

In this example, your partners enter service requests using the Siebel PRM Portal. The partner might get these service requests through its call center or through other customer contacts.

To enter a new service request through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Service screen.
2. In the Service Requests list, the partner adds a new record.
3. The partner enters information about the service request in the new record.

Using Self-Service to Get Help (Partner)

To get help in solving the problem that they logged, partners can enter a service request in the Self-Service screen of the Siebel PRM Portal.

To enter a new self-service request through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Self-Service screen.
2. In the service requests list, the partner adds a new record.
3. The partner enters information about the service request in the new record.

Responding to the Partner's Self-Service Request (Brand Owner)

The partner's self-service request is in the same queue as the other service requests that come to your company, and is assigned to a service agent in your company in the same way as other service requests are assigned. For example, you can configure Assignment Manager to assign the service request to a service agent based on your service agents' expertise, availability, or other factors.

Because your Siebel Business Applications share a single database, this service request appears in the Siebel PRM Manager or in any other Siebel Business Application that your service agents use to track service requests.

After your service agent responds to the self-service request, your service agent and the partner can continue to work together on the service request, if necessary, by logging updates to the service request.

To respond to a service request

1. Navigate to the Service screen, then the Service Request List view.

   The Service Request list appears, with the service requests that list you as owner.
2. After researching the service request, you as service agent can enter an activity, which appears as an update on the Siebel PRM Portal. Further updates logged by the partner through the Self-Service screen is visible to you in the Activities list in the Service screen of the Siebel PRM Manager.

3. You as a service agent can also add Attachments and Solutions to the Service Request record. The partner can view these through the Siebel PRM Portal as attachments to the service request in the Self-Service screen.

Example of the Partner Logging Service Requests and Transferring Them to the Brand Owner

This topic gives one example of how the partners work on customer service requests in collaboration with the brand owner. You might use this feature differently, depending on your business model

In this example, service requests are created by the partner companies and assigned to employees of the brand owner company. This example is appropriate for you if your partners receive customer service requests, and your company is responsible for fulfilling the service requests.

You might use this example in many different businesses. To give just one example, you could use it if your partners are resellers of satellite TV services, who take the orders for the service in the store, while the brand owner handles the actual installation of the satellite dish and the decoder. Whenever the reseller receives an order, the reseller logs a service request and assigns it to the brand owner so the brand owner can dispatch a field service technician to perform the installation.

This example consists of the following tasks:

- *Entering Service Requests (Partner)*
- *Assigning Service Requests to Brand Owner Employees (Brand Owner)*
- *Working on Service Requests (Brand Owner)*
- *Tracking the Service Request (Brand Owner)*

Entering Service Requests (Partner)

In this example, your partners receive new service requests and enter them into the Siebel Business Application using the Siebel PRM Portal.

You must set up Siebel Assignment Manager to assign service requests to the appropriate employee or organization in your company when partners enter service requests. Assignment Manager can assign service request based on employees' skills, product expertise, geography, or other criteria. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

To enter a new service request through the Siebel PRM Portal

1. In the Siebel PRM Portal, the partner navigates to the Service screen.
2. In the Service Requests list, the partner adds a new record.
3. The partner enters information about the service request in the new record.

   Assignment Manager has been set up to assign the service request to the appropriate organization or employee in your company.

Assigning Service Requests to Brand Owner Employees (Brand Owner)

If Assignment Manager has assigned the service request to an organization in your company, you must assign service requests to the appropriate service agent or field service technician in your company.

You can assign service requests manually. An employee at your company with access to the All Service Requests view can assign the service request to the appropriate employee, by choosing the employee name in the service request's Owner field.

Alternatively, you can have set up Assignment Manager to assign service requests to the appropriate employee automatically when they were entered by the partner.

In either situation, the service agent responsible for the request sees it in the My Service Requests view. For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide* .

Working on Service Requests (Brand Owner)

When the service request has been assigned to your service agent, the agent can view it in Siebel PRM Manager, Siebel Service, Siebel Call Center, or another Siebel Business Application by displaying the My Service Requests view of the Service screen. Because Siebel Business Applications use the same database, you do not have to export this record from Siebel PRM to other Siebel Business Applications.

To view a new service request

1. Navigate to the Service screen, then the Service Requests List view.
2. In the Service Requests list, drill down on the name of the new service request.
3. Navigate to the appropriate views to see more details about the service request.
4. After researching the service request and solving the customer's problem, the service agent chooses Closed in the Status field of the service request.

Tracking the Service Request (Brand Owner)

As your employees work on these service requests, you can track their progress using the Siebel PRM Manager, or their managers can track their progress using Siebel Service. Again, because Siebel Business Applications use the same database, you do not have to worry about exchanging data among different Siebel Business Applications.

You can track your employees' progress as they work on their service requests by displaying the service requests, viewing the activities attached to it, and checking the status field to see if the service request has been closed.

Your service agents' managers can track their reports' service requests by displaying the My Team's Service Requests view.

To track employee's service requests

1. Navigate to the Service screen, then the Service Requests List, and the My Team's Service Requests view.
2. In the My Teams Service Requests list, drill down on the name of a service request you want to track.
3. Navigate to the Activities view.

   The activities attached to that service request appear.

Examples of Field Service with Siebel PRM

Many brand owners use partners to provide field service and other types of service that require use of parts to service assets that customers have purchased. Siebel PRM provides the Inventory screen and the Assets screen to support this sort of service.

The following topics provide two typical examples for this sort of service:

- *Example of the Brand Owner and Partner Managing Inventory*
- *Example of the Partner Responding to Service Requests for Assets*

Example of the Brand Owner and Partner Managing Inventory

This topic gives one example of field service with Siebel PRM. You might use this feature differently, depending on your business model

Siebel PRM allows the brand owner and partners to work together to manage inventory, such as the spare parts that the partner needs to do repairs.

The brand owner can share inventory with the partner. The partner can locate inventory and use it to service customers. The brand owner can automatically warn the partner if the inventory of a given part is too low. For more information about working with inventory, see *Siebel Field Service Guide* .

This example consists of the following tasks:

- *Setting up an Inventory Location for the Partner (Brand Owner)*
- *Transferring Products to the Inventory Location (Brand Owner)*
- *Transferring Inventory to Inventory Sublocations (Partner)*
- *Finding Needed Parts (Partner)*
- *Monitoring Partner Inventory Level (Brand Owner)*

Setting up an Inventory Location for the Partner (Brand Owner)

First, the brand owner sets up one primary inventory location for each partner who uses inventory. The organization for this inventory location must be the partner's organization, so other partners cannot see this inventory.

To set up an inventory location for a partner

1. Navigate to the Inventory screen, then the Inventory Locations view.
2. In the Inventory Locations list, add a new record.
3. Fill in the fields of the new record as follows:
    a. In the Organization field, select the partner organization.
    b. In the Position field, select a partner position in the specified partner organization.

Transferring Products to the Inventory Location (Brand Owner)

Next, the brand owner associates products with the partner's inventory location. These can be transferred from the brand owner's inventory location, or they can be transferred from a virtual location that the brand owner created to hold products that are transferred to partners.

To transfer a product to the partner's inventory location

1. Navigate to the Inventory Transaction screen.
2. In the Inventory Transactions list, add a new record.
3. Fill in the fields of the new record as follows:
    a. In the Source Location field, choose either your own inventory location or the virtual location used to hold products for partners.

b. In the Destination Location field, choose the inventory location you created for the partner.
c. In the Commit field, add a check mark, completing the transaction.

Transferring Inventory to Inventory Sublocations (Partner)

The partner service administrator logs into the Siebel PRM Portal and sees that this inventory location has been assigned to him or her.

A small partner company with only one physical location for inventory could use this inventory location to represent its physical inventory location.

A larger partner company with several physical locations for inventory would create a subinventory location under this inventory location to represent each of its physical inventory locations. Then it would transfer the inventory from the inventory location that the brand owner created to these inventory locations.

To transfer inventory to product inventory locations

1. The partner service administrator navigates to the Administration - Inventory screen, then the Inventory Locations view.
2. In the Inventory Locations list, the partner adds a new record representing each of the partner company's physical inventory locations.
3. The partner navigates to the Inventory Transactions screen.
4. In the Inventory Transactions list, the partner adds a new record and fills in its fields as follows:
   a. In the Source Location field, the partner chooses the inventory location that the brand owner created.
   b. In the Destination Location field, the partner chooses one of the inventory locations created to represent the partner's physical inventory locations.
5. The partner continues to create new Inventory Transaction records until all of the inventory is transferred to locations representing the partner's physical inventory locations.

Finding Needed Parts (Partner)

Now, when a partner service agent needs a spare part, the agent can use the part browser to find where the part is located. The part browser limits the agent to the partner company's inventory locations.

Then, when the partner service agent creates a service order, the partner associates it with the inventory location where this part was found.

Siebel PRM automatically adjusts the quantity of that part in inventory to reflect the fact that parts were used in service orders.

To find a needed part

1. The partner service agent navigates to the Part Browser screen.
2. The partner searches for the part and finds its locations.

   Now, the partner can go to the nearest location that has the part in inventory to get it.

Monitoring Partner Inventory Level (Brand Owner)

The brand owner can monitor each partner's inventory for each part by navigating to the Part Browser screen and to the All Parts Across Organizations view.

The brand owner can monitor each partner's inventory locations by navigating to the Inventory screen and to the All Inventory Locations Across Organizations view. Then, the brand owner can navigate to the Product Inventory view and see if the partner is short of inventory by looking at the following fields in the Product Inventory Record:

- **Safety.** When inventory reaches the amount in this field, it is time for the partner to reorder.
- **Min.** This is the absolute minimum inventory. If the partner orders correctly the inventory does not reach the amount in this field, because the partner is expected to reorder parts when the inventory reaches the safety level.

The brand owner can set up Siebel Business Process Designer to automatically send the partner a notification telling the partner to reorder a part when the inventory of that part reaches the level in the Safety field. If the inventory of a part reaches the level in the Min field, Siebel Business Process Designer can send a more urgent warning to the partner, or it can send email to one of the brand owner's sales representatives who contacts the partner personally.

Example of the Partner Responding to Service Requests for Assets

This topic gives one example of field service with Siebel PRM. You might use this feature differently, depending on your business model

In this example, the partner uses the Assets screen to work with service requests for assets that customers have purchased. The brand owner can monitor the service requests for each asset.

This example consists of the following tasks:

- *Assigning Assets to a Partner (Brand Owner)*
- *Logging a Service Request Against the Asset (Partner)*
- *Looking at the History of the Asset (Partner)*
- *Monitoring a Partner's Service of Assets (Brand Owner)*

Assigning Assets to a Partner (Brand Owner)

A partner who services assets must have a list of assets that have been sold to each customer.

If the partner sells and services the product, the partner would create the asset record when it sells the product.

In this example, the brand owner sells products and the partner services them. When a brand owner sells a product, it assigns the asset to a partner company to be serviced.

To assign an asset to a partner company manually

1. Navigate to the Assets screen, then the List view.
2. In the Assets list, drill down on the name of the asset that you want to assign to the partner company.
3. In the More Info form, in the Organization field, select the organization of the partner company and click OK.

Logging a Service Request Against the Asset (Partner)

When a customer calls or comes in to request service on an asset, the partner service agent logs a service request against the asset.

The partner creates the service request record in the usual way, and associates it with an asset.

To log a service request against an asset

1. The partner navigates to the Service screen, then the Service Request List, and the My Customer's Service Requests view.
2. The partner creates a new Service Request record, and in the More Info form, in the Asset field, the partner chooses the Asset.

Looking at the History of the Asset (Partner)

To help in responding to the service request, the partner service agent uses the Assets screen to view all past service requests associated with the asset, see when the asset was installed, and look at other features of the asset's history.

To look at the history of the asset

1. The partner navigates to the Assets screen, then the List view.
2. In the Asset list, the partner drills down on the asset number for this asset.
3. The partner views information about the history of the asset in the Asset record and in the Activities, Notes, Service Requests, and Change Requests views.

Monitoring a Partner's Service of Assets (Brand Owner)

At any time, the brand owner can use the Siebel PRM Manager to view all the assets of a partner and to view the service requests associated with these assets, to monitor the partner's service of each asset.

To monitor a partner's service of assets

1. Navigate to the Assets screen, then the List, and the All Assets Across Organization view.
2. Drill down on the desired asset.
3. In the More Info form, in the Organization field, query for the partner organization.

   All assets for that partner company appear in the Assets list.
4. In the Assets list, select an asset.
5. Navigate to the Service Request view.

   All service requests for that asset appear.

About Managing Partners' Service Requests

Partners often encounter situations in which they need assistance from the brand owner because they have questions about the partnership, requests for marketing collateral, questions about commission payments, or other questions.

Your partners can use the Self-Service screen in the Siebel PRM Portal to log service requests, or if they have questions about the partnership, questions about using Siebel PRM software, or any other questions or needs that require personal service.

To reduce the number of service requests you receive, you can create a repository of FAQs, solutions, and SmartScripts to help partners solve their own problems without logging service requests. These are covered in *Solutions and SmartScripts with Siebel PRM*.

Note: Be sure to tell your partners to use the Self-Service screen of the Siebel PRM Portal to log their own service requests. The Service screen is used to log customer service requests.

Assigning Service Requests

Your company's service requests are listed in the Siebel PRM Manager and other Siebel Business Applications in the All Service Requests view of the Service screen. As they are received, each request is assigned to the appropriate service agent. After the service agents resolve service requests, they change their status to Closed.

You can assign service requests in two ways:

- **Assignment Manager.** You can set up Siebel Assignment Manager to assign service requests to the appropriate service agent at your company using criteria such as expertise, availability, and workload.
- **Manual assignment.** Service requests logged by the partner are displayed in the All Service Requests view in the Siebel PRM Manager. An employee at the brand owner company with access to this view can assign the service requests manually to the appropriate service agent.

For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*. For more information about working with service requests, see *Siebel Applications Administration Guide*.

Scenario Using Partner Self-Service

The following scenario shows how a partner might use a service request to get marketing materials.

One of your partners wants to organize a marketing event such as an executive seminar about partner relationship management. It needs to get appropriate marketing material from you for this event, where it displays both your brand name and its own brand name.

The partner logs a service request for the marketing materials through the Self-Service screen in the Siebel PRM Portal.

The service request is routed to the appropriate person at the brand owner company by Assignment Manager, or it is assigned manually by the person responsible for assigning service requests at the brand owner company.

The service agent fulfilling the service request follows up by finding the appropriate marketing material and routing it to the partner.

Solutions and SmartScripts with Siebel PRM

You can help partners solve problems by creating solutions or Siebel Troubleshooting or Instruction SmartScripts. Solutions or SmartScripts can help partners solve:

- **Customer problems.** Partners can use solutions or SmartScripts rather than getting help from the brand owner to solve customer service requests.
- **Partnership problems.** Partners can use solutions or SmartScripts to solve their own problems, rather than using the Self-Service screen to enter service requests.

Solutions and SmartScripts are discussed in the following topics:

- *Scenario Using Solutions and SmartScripts to Help Partners*
- *Making Solutions Available to Partners*
- *Making Troubleshooting or Instruction SmartScripts Available to Partners*

Scenario Using Solutions and SmartScripts to Help Partners

The following is a scenario showing how a partner might use solutions and SmartScripts that you have set up.

One of your partners is planning to organize a seminar to educate executives about partner relationship management. The partner wants to know whether the brand owner agrees to refund the cost of this marketing event.

The partner navigates to the Solutions screen in the Siebel PRM Portal, browses the frequently asked questions (FAQs), and searches on keywords to find relevant solutions.

The partner finds an FAQ that says there is a SmartScript with a series of questions and answers that let you identify whether marketing events qualify for reimbursement.

The partner navigates to the Solutions screen in the Siebel PRM Portal and runs this SmartScript. It asks a series of questions about the type of event being organized, the partner company's partnership level, and other parameters that determine whether a marketing event qualifies for reimbursement.

The partner finds that the seminar qualifies for reimbursement. However, the partner still needs some help from the brand owner, such as marketing material and permission to use its logos. To get this help, the partner navigates to the Self-Service screen and logs a service request, as described in *About Managing Partners' Service Requests*.

Making Solutions Available to Partners

Service solutions are answers to frequently asked questions (FAQs). You can create solutions that your customers, employees, or partners can use. You can associate a solution with related solutions and resolution documents, so users can navigate among these related documents. A service agent can associate a solution with a service request or a change request to make it available to the user who logged the request.

Solution records can be published internally, externally, or both:

- Solutions published internally are accessible to your employees.
- Solutions published externally are accessible to customers.

You publish solutions internally to make them available to partners, because Siebel PRM treats partner employees as your employees.

Use access control to make solutions accessible to a specific partner or partner community. Use the Catalog Administration screen to add the solution to a catalog that is associated with the partner community for which you want to make it visible.

Your partners access these solutions through the Solutions view of the Solutions screen in the Siebel PRM Portal. Partners can browse through the solutions or use a keyword search to find the solution they need. The Solutions view shows a flat list of solutions, which is useful for a keyword search.

Alternatively, solutions can be added to catalogs and be made available to users through the InfoCenter screen. Navigation of the InfoCenter is more straightforward.

For information on creating and administering service solutions, FAQs, and resolution documents, see the topics on solutions and service requests in *Siebel Applications Administration Guide* .

Making Troubleshooting or Instruction SmartScripts Available to Partners

A SmartScript is a set of branching questions and instructions. The answer to each question determines which question or instruction appears next.

Siebel SmartScripts are often used by call center agents who perform troubleshooting. The SmartScript tells them what question to ask the customer. Depending on the customer's answer, the SmartScript tells them the next question to ask. The scripted series of questions and answers helps the agent identify and solve the problem.

You can also create SmartScripts to help your customers, employees, or partners solve problems.

After you have created and tested the SmartScript, you select the Active check box to make it available.

For information about creating and administering SmartScripts, see *Siebel SmartScript Administration Guide* .

To make a Troubleshooting or Instruction SmartScript available to partners

1. Navigate to the Administration - SmartScript screen, then the Scripts view.
2. Add a new record to the Scripts list, and enter the following:
    a. Select Troubleshooting or Instructions in the Type field.
    b. Click the Active check box.
3. Add the SmartScript to the Service Catalog in the desired category.
4. Make sure the partner is in the Access group for that category.

    The SmartScript is visible to the partner in the Solutions screen of the Siebel PRM Portal. The partner can filter to display only Troubleshooting or Instruction SmartScripts.

11 Managing Marketing Campaigns with Siebel PRM

Managing Marketing Campaigns with Siebel PRM

This chapter describes scenarios that illustrate different ways you can use Siebel PRM to manage marketing campaigns. It includes the following topics:

- *About Managing Marketing Campaigns*
- *Collaborative Marketing with Partners*
- *About Marketing to Partners*
- *Marketing by Your Partners*

About Managing Marketing Campaigns

Siebel PRM can be used for three types of marketing:

- **Collaborative marketing with your partners.** The brand owner can work collaboratively with partners to market your products to customers.
- **Marketing to your partners.** The brand owner can direct marketing campaigns to your partners to help convince them to resell a new product that you are introducing, to join a specific partner program, or for other reasons.
- **Marketing by your partners.** Partners can use the Siebel PRM Portal to create and execute their own marketing campaigns.

This chapter describes some examples that are examples of ways that you might use Siebel PRM for marketing. Siebel Business Applications include marketing functionality that lets you create marketing offers, campaigns, and programs, that executes campaigns automatically, and that helps you manage responses. For more information about marketing, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Collaborative Marketing with Partners

You often want to work with your partners collaboratively to market your products to your customers. Use Siebel PRM for the following tasks:

- *Planning Collaborative Marketing Campaigns*
- *Managing Collaborative Marketing Campaigns*

Planning Collaborative Marketing Campaigns

You can use the Siebel PRM CHAMP Planning screen to plan collaborative marketing projects. This screen lets you do the following:

- Set specific marketing objectives, such as offering a 20% discount offer on a server product line in order to generate a 10% increase in revenue, or jointly hosting a conference about complementary products.
- Associate a detailed action plan with each objective, scheduling actions that you and your partner must take to meet the objective.
- Link each objective to a market development fund (MDF) to indicate the source of funding for the marketing program. Partners is able to link fund requests to the objectives so they can receive credit for money spent executing the marketing program.

For example, the brand owner and partner might decide to host an event to promote their complementary products or services. They use the CHAMP Planning screen to specify an agreed-upon action plan. Following the action plan, the partner organizes the event. As the partner incurs expenses in organizing the event, it submits MDF requests to receive credit against the fund. For more information about CHAMP planning, see *CHAMP Planning*. For more information about market development funds, see *Using Market Development Funds*.

Managing Collaborative Marketing Campaigns

Campaigns typically involve contacting current or potential customers to market your products. For instance, you might have a campaign to contact people and sign them up for a seminar, or a campaign to send out a promotional mailing requiring that the recipients call in if they are interested in your products or services.

Because campaigns are contact-intensive, they are often handled by a call center. Many Siebel campaign functions are designed to maximize a campaign's effectiveness in a call center environment. Siebel Business Applications let you create campaigns, specify lists and groups of people to call, specify quotas for the call center personnel, and track which employees have the skills needed for different campaigns.

Partner employees have access to call center campaigns through the Siebel PRM Portal in the same way that your employees have access through the Siebel PRM Manager. Partners can use the Siebel PRM Portal to update call status and outcome, refresh the contacts list, start SmartScripts, create campaign leads, and do the other things that your internal employees do when they work with campaigns.

You can also share other kinds of campaigns with partners, such as email, Web, or direct mail campaigns. For example, the brand owner could set up an email campaign, allow the partner to edit the contact list, close the campaign for editing, and then start the email campaign. In this situation, the brand owner executes the email campaign, but the partner has input on where the emails are sent.

You create collaborative campaigns and campaigns that your own company executes in the same way. The only difference is that, for collaborative campaigns, you add partner organizations to the campaign, as well as your own employees. Siebel PRM lets your partners use the same functionality that your own company uses to run campaigns.

After associating partner organizations with the campaign, you can use the Execution Options view of the Campaign Administration screen to assign campaign contacts to partners manually or by using Siebel Assignment Manager. Partners see only contacts that have been assigned to them. You can also use this view to specify whether partners can add and edit contacts for the campaign.

As an alternative method of assigning partners to campaigns, you can use the Administration - Campaign Management screen, Campaign Groups view to create groups of employees. For example, you can define a team of people within a

partner company who regularly execute campaigns as a campaign group. You can assign the groups to campaigns, by using the Campaign Management screen, Groups view. After you assign the campaign to the partner organization, the partner can also assign these groups to the campaign using the Siebel PRM Portal.

In one typical way of executing a collaborative campaign, the brand owner sets up the campaign and provides a contact list to the partner company, and the partner executes the campaign in its call center. For example, a collaborative campaign might involve the following scenario:

- Your company and your partner have sponsored an event collaboratively. You want to follow up by giving the attendees a phone offer to buy one of your products at a discounted price.
- You create the campaign and the offer using the Siebel PRM Manager's Campaign Management screen.
- You add the attendees at the trade show to the campaign's Contacts/Prospects list using the Siebel PRM Manager's Campaign Administration screen. Alternatively, you import a list of attendees using the Siebel list management functionality, which lets you import lists in many standard formats.
- You add one or more partner organizations to the campaign using the Siebel PRM Manager's Campaign Administration screen. All partner companies whose organizations have been added have visibility into the Campaign header using the Campaign Planning screen on the Siebel PRM Portal. A marketing manager at the partner company can then add employees at the partner company to the campaign team.
- Depending on the execution options, campaign contacts are assigned to the partners associated with the campaign either through Assignment Manager or manually. Other options determine whether partner organizations can or cannot add, remove or edit campaign contacts.
- The partner company's call center executes the campaign. Partner employees who are on the campaign team can see this campaign in the My Campaigns view of the Siebel PRM Portal's Campaigns screen. They can navigate to the views to display a summary of the campaign, the call guide, the offer, the list of prospects and contacts, and other information.

For more information about creating campaigns, see *Siebel Applications Administration Guide* .

To add partner organizations to the campaign team

1. Navigate to the Campaign Management screen, then the Campaign List view.
2. In the Campaign list, select the campaign that you want the partner to execute.
3. In the Organization field of the campaign, click the Multiple Select button and use the dialog box to select partner organizations.

   All partner organizations that were added can see information about the campaign through the Campaign Planning screen of the Siebel PRM Portal.

About Marketing to Partners

You can market to your partners to recruit more partners into your partner program, recruit existing partners into a new program, inform your partners about a new promotion or a new product introduction, invite partners to an event, ask partners to participate with you or sponsor an event, or for other reasons.

Siebel PRM and Siebel Marketing allow your marketing managers to market to partners through a variety of channels, and to market to partners in conjunction with their other marketing activities. It is common to perform the following tasks:

- *Creating and Executing Campaigns for Marketing to Partners*

- *Making Campaign Offers to Partners*

Creating and Executing Campaigns for Marketing to Partners

Campaigns are the key method of marketing to partners or to customers. You create campaigns with specific goals, such as introducing a new product, and offers that are part of each campaign, such as an offer to sell the product at a discount price.

You can use the Campaign Administration screen to create campaigns that are specifically targeted to your partners, create offers and associate them with the campaign, create a prospect list that consists of prospective or existing partners, and send the offers to the prospects through a variety of channels: direct mail, fax, email, Web, phone, or newsletter.

For example, if you are introducing a new product line and want existing resellers of other product lines to sign up as resellers of this new line, you might go through the following process:

- **Create a new campaign.** Navigate to the Campaign Administration screen, add a new record, and enter information describing the campaign.
- **Add contacts to the campaign.** Determine which partners you want to receive the campaign and add them to the campaign's contact list, or use list management to import a list of prospective partners.
- **Create an offer for the campaign.** Determine how you want the partners to get the news about this product introduction, and then navigate to the Offers screen to create an appropriate offer. For example, if you want to contact the partners by email, create an email offer and associate literature (such as a brochure and price list) with the offer. The email can also have a link to the Siebel PRM Portal, where they can find out more about the new product line and sign up as resellers.
- **Execute the campaign.** The email is sent, and partners respond if they are interested.
- **Create a followup campaign.** To follow up the email campaign, you might plan an event for partners to attend if they have signed up as resellers of this product. You could create and execute this followup campaign as you did the initial campaign, except that the contacts are only the partners who have signed up as resellers and the campaign is a phone campaign, so it is executed by your call center. Creating the followup campaign requires Siebel Marketing.

For more information about campaigns, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Making Campaign Offers to Partners

When you do collaborative marketing with partners, you generally create phone offers and have the partners execute the phone campaign. When you market to your partners, you can use a variety of offers, including:

- eNewsletters
- eMail Offers
- Direct Mail Offers
- Web Offers
- Fax Offers
- Phone Offers

Offers can be used for marketing and for communicating with partners.

For example, you can create eNewsletters that update partners on the latest information about your company, or create eNewsletters that are delivered on a regular schedule. The eNewsletters can have a variety of purposes: you can use them for regular newsletters, news releases, quarterly financial results, special promotions, or for other purposes.

Offers have content that can be personalized for each recipient. The Offers screen lets you create sections for each type of offer and to specify rules that determine which sections the recipient sees.

For information about working with offers, see *Siebel Marketing User Guide* .

Marketing by Your Partners

The Campaign Planning screen of the Siebel PRM Portal allows partners to create their own campaigns and execute them independently of the brand owner.

Partners create campaigns as the brand owner does. They use the Campaign Planning screen to create a new Campaign record, and to create the following records that are associated with the campaign:

- **Lists.** This record allows the partner to add external lists of contacts or prospects to the campaign.
- **Offers.** This record allows the partner to specify offers that the campaign makes to customers, including phone, direct mail, email, fax, media, and other types of offers.
- **Contacts/Prospects.** This record allows the partner to add existing Siebel Contacts to the campaign.
- **Owner Audit Trail.** This record allows the partner to track ownership of campaign contacts.
- **Quotas.** This record allows the partner to set targets for the campaign, such as the number of calls each hour.
- **Responses.** This record allows the partner to track responses to the campaign, if it is a campaign with a response type of *Response*.
- **Team.** This record allows the partner to specify the employees working on the campaign.
- **Groups.** This record allows the partner to add predefined lists of employees to the campaign team.

Other partners cannot see a campaign created by a partner company. The brand owner can see all partners' campaigns by navigating to the Campaign Administration screen, All Campaigns Across Organizations view.

The Campaign Planning screen of the Siebel PRM Portal is similar to the Campaign Administration screen in Siebel PRM Manager, but without a number of views. For more information about how the Campaign Administration screen is used, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

Siebel Marketing Manager for Partners is an additional product that offers more extensive marketing functionality for partners than Siebel PRM. For more information about this product, see *Siebel Marketing Installation and Administration Guide* and *Siebel Marketing User Guide* .

12 Managing Partner Commerce

Managing Partner Commerce

This chapter describes how you can use Siebel PRM to manage partner commerce. It looks at ways that you can use partner commerce to sell to partners, and at ways that partners use partner commerce to sell to customers. It includes the following topics:

- *About Partner Commerce*
- *Setting Up Partners for Standard, Power, and Personal Commerce*
- *About Standard Partner Commerce*
- *Disabling Partner Commerce Workflows*
- *Removing the PRM Portal Shopping Cart Toolbar*

About Partner Commerce

Siebel PRM supports the following types of partner commerce:

- **Standard Partner Commerce.** Allows partners to create quotes and orders using a shopping cart, as customers do using Siebel Sales. Standard partner commerce is straightforward and can be used by partners with little or no training.
- **Power Partner Commerce.** Allows partners to create quotes and orders using the Quotes and Orders screens, as your own employees do using Siebel Partner Manager, Siebel Sales or other Siebel Business Applications. Power partner commerce might require more training and has more capabilities.
- **Personal Partner Commerce.** Allows partners to buy only on their own account, not on behalf of a customer.

Setting Up Partners for Standard, Power, and Personal Commerce

Whether partner employees use standard partner commerce, power partner commerce, or personal partner commerce views depends on their responsibilities.

- **Responsibility** controls which views the partner can use. You assign partners a responsibility that allows them to access the standard partner commerce views or a responsibility that allows them to access the power partner commerce views.

To set up a partner employee as a standard partner commerce user

1. Navigate to the Administration - User screen, then the Employees view.
2. In the Employees list, drill down on the name of the partner.

3. In the More Info form, in the Responsibility field, click the Multiple Select button.
4. In the Responsibilities dialog box, add a new record.
5. In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Standard User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

Use the following procedure to set up a partner employee as a power partner commerce user.

To set up a partner employee as a power partner commerce user

1. Navigate to the Administration - User screen, then the Employees view.
2. In the Employees list, drill down on the name of the partner.
3. In the More Info form, in the Responsibility field, click the Multiple Select button.
4. In the Responsibilities dialog box, add a new record.
5. In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Power User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

Use the following procedure to set up a partner employee as a personal partner commerce user.

To set up a partner employee as a personal partner commerce user

1. Navigate to the Administration - User screen, then the Employees view.
2. In the Employees list, drill down on the name of the partner.
3. In the More Info form, in the Responsibility field, click the Multiple Select button.
4. In the Responsibilities dialog box, add a new record.
5. In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Personal User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

About Standard Partner Commerce

Your partners can use standard partner commerce to shop in two ways:

- *Partners Shopping for Themselves*. The partner is your customer.
- *Partners Shopping for Customers*. The partner is your sales agent, selling your products to customers.

In both of these methods, partners use the Siebel Sales catalog to choose products. For more information about setting up and using Siebel Sales, see *Siebel eSales Administration Guide* .

Partners Shopping for Themselves

Partners can place orders for themselves to replenish their store inventory or to order new products that the brand owner has made available to them as product offers.

After shopping, partners use the My Quotes and My Orders views in the Quotes and Orders screens in the Siebel PRM Portal to track the quotes and orders that they created.

Partners shop for themselves in the same way whether they use standard partner commerce or power partner commerce.

If partners are using personal partner commerce, the Siebel CRM system skips the step that asks the partners whether they are shopping for themselves or for customers, because they can only shop for themselves.

To shop for themselves

1. In the Siebel PRM Portal, the partner navigates to the Product Catalog screen.
2. The partner browses the catalog and adds an item to the Shopping Cart.

   The New Cart form appears, with the question Who are you shopping for?
3. The Partner clicks My Company.

   The shopping cart appears.
4. The partner continues to browse the catalog and add items.
5. While browsing, the partner can click the Shopping Cart icon at any time to display the shopping cart.
6. In the shopping cart, the partner can click Check Out to complete the purchase, or the partner can click Save Cart to save the cart as a quote.
7. If the partner has saved the cart as a quote, it can be viewed by navigating to the My Quotes view.

Partners Shopping for Customers

Partners with Standard Partner Commerce have only the easiest to use method of shopping for customers. Partners with Power Partner Commerce have additional methods of shopping for customers.

Shopping for Customers Using Standard Partner Commerce (partner)

Your partners' sales agents can use the Siebel PRM Portal to shop, provide quotes, and place orders for their customers, for example, if the partners are resellers of your products. This is more complicated than shopping for themselves, because resellers could have different price lists for different customers, based on geography, account, or other factors.

After shopping, partners use the My Customer Quotes and My Customer Orders views in the Quotes and Orders screens in the Siebel PRM Portal to track quotes and orders that they created.

To shop for customers using Standard Partner Commerce, the partner uses the shopping cart and product catalog.

This method gives the partner a simple shopping process. It does not allow the partner to specify line item Ship To addresses.

To shop for customers using Standard Partner Commerce (partner)

1. In the Siebel PRM Portal, the partner using Standard Partner Commerce navigates to the Product Catalog screen.
2. The partner browses the catalog and adds an item to the Shopping Cart.

   The New Cart form appears, with the question Who are you shopping for?
3. The Partner clicks A Customer.

   The Customer Information form appears.
4. In the Customer Information form, the partner selects the customer's account, last name, price list, and to link the sale to an opportunity. After selecting the customer's account, the partner can select a price list for that account.
5. In the Customer Information form, the Partner clicks Next.

   The Shopping Cart form appears, with the Customer Information form.
6. The partner continues to browse the catalog and add items for the customer.
7. When the shopping cart is displayed, the partner can edit the information in the Customer Information form.

8. In the shopping cart, the partner can click Check Out to complete the purchase, or the partner can click Save Cart to save the cart as a quote.
9. If the partner has saved the cart as a quote, it can be viewed by navigating to the My Customer Quotes view in the Quotes Screen.

Shopping for Customers Using Power Partner Commerce (partner)

Your partners' sales agents can use the Siebel PRM Portal to shop, provide quotes, and place orders for their customers, for example, if the partners are resellers of your products. This is more complicated than shopping for themselves, because resellers could have different price lists for different customers, based on geography, account, or other factors.

After shopping, partners use the My Customer Quotes and My Customer Orders views in the Quotes and Orders screens in the Siebel PRM Portal to track quotes and orders that they created.

To shop for customers using Power Partner Commerce, the partner can follow any of the following three processes:

- Use the Shopping Cart and Product Catalog
- Use the Quotes Screen and the Product Catalog
- Use the Quotes Screen without the Product Catalog

Using the Shopping Cart and Product Catalog

This is the best option if the partner does not have to specify line item Ship To addresses and if you want a simple shopping process.

When they use this method, partners with Power Partner Commerce shop for customers in the same way as partners with Standard Partner Commerce. For instructions on how this is done, see the topic *Partners Shopping for Customers*.

Using the Quotes Screen and the Product Catalog

This is a good option if you have partners who are experienced users. The Quotes screen provides additional functionality, such as the ability to specify due date, effective date, through date, or different bill to and ship to addresses than the defaults for the account.

This option is only available to Power Partner Commerce users.

To shop using the Quotes screen and the Product Catalog

1. In the Siebel PRM Portal, the partner using Power Partner Commerce navigates to the Quotes screen.
2. The partner clicks the My Customer Quotes link.
3. The partner creates a new quote and enters Quote Header information, such as the account, contact, price list, and so on.
4. In the Quote Header form, the partner clicks Browse Catalog.
5. The partner browses the catalog and adds items to the cart.
6. In the catalog, the partner navigates to the Quote Detail view.
7. The partner reviews and, if necessary, edits line items in the quote.
8. The partner navigates to the Orders view.
9. The partner clicks Sales Order or Service Order to turn the quote into an order.

Using the Quotes Screen Without the Product Catalog

This is also a good option if you have partners who are experienced users. It provides the same functionality as the previous option. The difference is a matter of preference: some brand owners think the product catalog is easier for partners to understand and work with, so they use the previous method. Other brand owners think that it is faster for partners to make choices from a flat list of products, so they use this method.

This option is only available to Power Partner Commerce users.

To shop using the Quotes screen without the Product Catalog using Standard Partner Commerce

1. In the Siebel PRM Portal, the partner using Power Partner Commerce navigates to the Quotes screen.
2. In the Quotes form, the partner clicks the My Customer Quotes link.
3. In the Quotes list, the partner creates a new quote and enters Quote Header information, such as the account, contact, price list, and so on.
4. The partner navigates to the Line Items view.
5. In the Line Items list, the partner adds a new line item to the quote.
6. The partner selects a product for the new line item, enters the quantity, discount, and other information.
7. The partner continues to create a new line item for each product being purchased.
8. The partner navigates to the Orders view.
9. The partner clicks Sales Order or Service Order to turn the quote into an order.

Note: Partners can manage large quantities of quotes and orders for their customers using the bulk request functionality. For more information about bulk requests, see *Siebel Order Management Guide Addendum for Communications* .

Disabling Partner Commerce Workflows

When a partner adds an item to a new shopping cart, both standard partner commerce and power partner commerce call workflows that ask whether the partner is shopping on behalf of a customer or on their own behalf.

You can turn off this functionality by deleting the following parameter:

```
PostAddToCartLogic = eChannelShoppingScenarios
```

You must delete this parameter in both the Server Administration screen and the Siebel Server.

To disable the message that asks partners who they are shopping for

1. Use any text editor to open the configuration file for the Siebel PRM Portal, which is the file *installation directory*\siebsrvr\bin*lang*\scw.cfg.
2. In the [InfraShoppingService] section of the file, delete the following line:

   ```
   PostAddToCartLogic = eChannelShoppingScenarios
   ```
3. Change this parameter in the Server Administration screen:
   a. Navigate to the Server Administration screen, then the Components.
   b. Navigate to the Component Parameters view.
   c. In the Components list, search for eChannel Object Manager in the Name field.
   d. In the Component Parameters list, find the parameter *PostAddToCartLogic* and delete it.
4. Restart your server.

Removing the PRM Portal Shopping Cart Toolbar

The standard method of removing toolbars is not used for removing the Shopping Cart toolbar from the Siebel PRM Portal.

This topic gives high-level instructions for removing this toolbar. Do this only if you are experienced at working with Siebel Tools. For more information, see *Using Siebel Tools*.

To remove the PRM Portal shopping cart toolbar

1. In Siebel Tools, navigate to:

   Web Page = Page Container Partner Portal Web Page

   Web Page Item = Shopping Cart
2. Set Inactive = TRUE.

13 Partner-to-Partner Collaboration

Partner-to-Partner Collaboration

Other chapters of this book describe ways in which Siebel PRM allows the brand owner to work with partners. This chapter describes ways in which your partner companies can use Siebel PRM to collaborate with other partner companies. The brand owner can track the collaboration, but does not have to participate in it.

- **Partner Collaboration.** Provides a powerful way for partners companies to share information with employees or organizations of other partner companies.
- **Siebel Projects.** Provide a simple way for partner employees to share information with employees of other partner companies.

It includes the following topics:

- *About Partner Collaboration*
- *Example of Partner Collaboration*
- *About Siebel Projects*
- *Example of Using Siebel Projects for Partner-To-Partner Collaboration*

You can also configure visibility using Siebel Tools to allow partners to share information in other ways. For more information, see *Configuring Visibility for Siebel PRM*.

About Partner Collaboration

Partner collaboration allows partners to share information with either employees or organizations of other partner companies. It can be used to share information among two or more partner companies.

It also provides partners with an automated process of requesting and accepting collaborations. After using the Partner Locator to find partners it wants to collaborate with, the partner navigates to Request Collaboration to send a message to these partners. The invitee partners can see these collaboration requests in the Collaborations screen and can accept or reject them by changing the value of the Status field.

When a request is accepted, a Collaboration record is created. Partners associate this collaboration with resources, employees, or organizations that work on the collaboration.

The partner does not need to create a new collaboration whenever it has to collaborate on a new opportunity. After the collaboration and resources have been established, the partner can use resources on any new opportunities (or on other data) for the duration of the collaboration.

After the collaboration is set up, the partner companies that are collaborating can share opportunities, service requests, quotes, orders, campaigns, accounts, contacts, projects, and other information.

Example of Partner Collaboration

The following is an example that describes how a partner can work on opportunities in collaboration with other partner companies. This example consists of the following tasks:

- *Locating Other Partners and Sending Collaboration Requests (Initiating Partner)*
- *Accepting the Collaboration Request (Invitee Partner)*
- *Creating a Collaboration (Initiating Partner)*
- *Adding Resources to the Collaboration (Initiating and Invitee Partner)*
- *Sharing Opportunities (Initiating and Invitee Partner)*
- *Monitoring Their Collaborations (Initiating and Invitee Partner)*
- *Monitoring All Collaborations (Brand Owner)*

Locating Other Partners and Sending Collaboration Requests (Initiating Partner)

As the first step, the partner who is the initiator of the collaboration uses the Partner Locator and enters criteria to find other partners to collaborate on this project. For example, it might look for other partners in a specific location with a specific expertise.

After the initiator has located other partners, it navigates to Request Collaboration to send them a message asking them to collaborate. Because the initiator does not necessarily know individuals in the partner company they are inviting to collaborate, the message is sent to the organizations of the invitee.

To locate partners and send collaboration requests

1. The initiating partner navigates to the Partner Locator screen.
2. In the Partner Locator, the partner enters criteria to identify other partner companies for this collaboration and clicks Search.

   The Partner Locations list appears, listing all partners that match the criteria.
3. The initiating partner selects the records of all the partner organizations in the list to be invited to collaborate.

   The initiating partner checks the Available column of the Partner Locator to see whether a partner organization can be involved in a collaboration.
4. The partner clicks Request Collaboration.

   The Outbound Request form appears.
5. The partner fills out the Outbound Request form with the information in the following table, and navigates to Send Request.

Field	Description
Initiator	Displays the organization that is initiating the collaboration.

Field	Description
Recipients	Displays the partner companies being invited to participate in the collaboration. This list includes the partner companies that were chosen in the Partner Locator. The partner can also click the Multiple Select button and use the Collaboration Organizations dialog box to add or remove partners from the recipient list for the request.
Description	Enter a description of the collaboration that gives other partners enough information to decide whether they want to join the collaboration.
Request Type	Select the type of collaboration.
Request Date	Enter the date of the request. The default is the date created.
Expiration Date	Enter the date the request becomes inactive. If the recipients do not respond by this date the request is removed from the recipients' inbox.
Name	Enter a name for the collaboration request.
Created By	Displays the login of the creator of the request.
Created	Displays the date the request was created.

Accepting the Collaboration Request (Invitee Partner)

The collaboration request is in the Inbound Request list of each invitee partner. The partner can accept or reject the request by changing the value in its Status field. The default status of a new request is Pending. The partner changes this value to Accepted or Rejected.

The initiating partner checks the Status field of the request in the Outbound Requests view to see if the request was rejected or accepted.

To accept or reject a collaboration request

1. The invitee partner navigates to the Partner Collaboration screen, then the Inbound Collaboration Requests view.
2. In the Inbound Request list, the partner drills down on the name of a new request.
3. In the Request Status view, in the Status field, the partner chooses Accepted or Rejected.

Creating a Collaboration (Initiating Partner)

After invitee partners accept the collaboration, the initiating partner creates the collaboration. When the initiating partner clicks the Create button, the collaboration is created and all the invitees who have accepted the collaboration are copied as participants of the collaboration.

To create a collaboration

1. The initiating partner navigates to the Partner Collaboration screen, then the Outbound Collaboration Requests view.
2. In the Outbound Request list, the partner selects the request that has been accepted.
3. The partner clicks Create Collaboration.

   A Collaboration record is created based on the request, and all the invitee partners who accepted the request are copied as participants of the collaboration.
4. The partner fills out the other fields in the Collaboration form.

Adding Resources to the Collaboration (Initiating and Invitee Partner)

When an invitee partner has accepted the collaboration request, a collaboration record is created. The next step is for both the initiating partner and the invitee partner to add resources to the collaboration.

Resources can be the positions of employees in the partner's company or organizations in the partner's company. Each partner in the collaboration adds positions and organizations in its own company.

To add resources to the collaboration

1. Both the initiating and the invitee partners navigate to the Partner Collaboration screen.
2. In the Collaborations list, the partner selects a collaboration.
3. The partner navigates to the Resources view.
4. In the Resources list, the partner adds a record and selects resources, using the following fields.

Field	Description
Primary	Select a resource from this list.
Resource Name	The name of the resource, entered automatically when you select the resource using the Primary list.
User ID	If the resource is a position, the employee's login ID is entered automatically when you select the resource using the Primary list.

Field	Description
Organization	If the resource is an organization, the organization is entered automatically when you select the resource using the Primary list.
Type	The type of the resource, position, or organization, entered automatically when you select the resource using the Primary list.
Description	The description of the resource, entered automatically when you select the resource using the Primary list.
Start Date	The date when the resource becomes available, entered automatically when you select the resource using the Primary list.
End Date	The date when the resource is no longer available, if one exists, entered automatically when you select the resource using the Primary list.

Sharing Opportunities (Initiating and Invitee Partner)

After the collaboration is set up, the partner companies that are collaborating can share opportunities, service requests, quotes, orders, campaigns, accounts, contacts, projects, and other information.

For example, when a partner company in the collaboration works on an opportunity, it can share the opportunity and associated information with the other partner company, assigning the opportunity to any employee or organization in the other partner company that is a resource in the collaboration.

To share an opportunity with another partner company

1. The partner navigates to the Opportunities screen.
2. The partner drills down on an existing opportunity or creates a new opportunity and enters information in the record and More Info form.
3. The partner clicks Collaborate.

   The Grant Access to Collaboration Resources dialog box appears, listing all positions and organizations in other partner companies with which this partner employee has a relationship.
4. In the dialog box, the partner selects Resources and clicks OK.

   Partner positions that were selected are added to the sales team for the opportunity and can see it in the My Opportunities view. Partner organizations that were selected are added to the organization team for the opportunity and can see it in the All Opportunities view.

Monitoring Their Collaborations (Initiating and Invitee Partner)

At any time, a partner company can get an overview of all its collaborations.

To monitor its collaborations

1. The partner navigates to the User Profile screen, then the Company Profile view.
2. The partner navigates to the Collaborations view.
   A list of all the partner company's collaborations appears.
3. In the Collaboration list, the partner selects a collaboration.
   All of the resources for this collaboration are displayed in the Resources list, which appears after the Collaboration list.

Monitoring All Collaborations (Brand Owner)

Throughout the process, the brand owner can view all collaborations that partners have created, to monitor partner collaborations.

The brand owner can also view the opportunities, service requests, and other information being shared in the collaboration by using the appropriate view, such as the All Opportunities Across Organizations view.

To monitor all partner collaborations

1. Navigate to the Partners screen, then the Partner List view.
2. Drill down on the name of a partner company whose collaborations you want to see.
3. Navigate to the Collaborations view.
   A list of all the partner company's collaborations appears.
4. In the Collaboration list, select a collaboration.
   All of the resources for this collaboration are displayed in the Resources list, which appears after the Collaboration list.

About Siebel Projects

Siebel Projects is a virtual work space that allows direct partner-to-partner collaboration among employees of different partner companies. Partners can use it to work together on software deployment, installation of equipment, sales opportunities that require involvement of multiple partners, and many other types of projects.

All partner employees who are part of the project can view information associated with the project, so employees of different partner companies can use the project to share information and work together.

The brand owner also has visibility across all projects on which the partners are working. Brand owners can monitor the status of the project based on project time lines, project budget, and key risk areas. For more information about Siebel Projects, see *Siebel Project and Resource Management Administration Guide* .

Example of Using Siebel Projects for Partner-To-Partner Collaboration

The following is a example that describes how a partner that specializes in deploying software applications uses Siebel Projects to work with a partner that specializes in hardware. Because these partners are part of the same project, they can share information and work collaboratively on the project.

This example has the following tasks:

- *Creating a New Project (Initiating Partner)*
- *Locating Other Partners and Adds Them to this Project (Initiating Partner)*
- *Adding Their Employees to the Project (Initiating and Invitee Partners)*
- *Working Together on the Project (Initiating and Invitee Partners)*
- *Tracks the Partners' Work (Brand Owner)*

Creating a New Project (Initiating Partner)

In the example used in this scenario, a partner company that specializes in implementation has won a contract to deploy the brand owner's software. This partner uses the Siebel PRM Portal to create a project, which it can use to work with the brand owners and with other partners.

To create a project

1. In the Siebel PRM Portal, the partner navigates to the Projects screen.
2. In the Projects list, the partner adds a new record.
3. The partner confirms that its own organization has been added to the project by making sure that it is listed in the Organization field of the new project record.
4. In the new project record, the partner fills out the fields with information about the project, such as project description, time lines, budget, and key contacts.

Locating Other Partners and Adds Them to this Project (Initiating Partner)

The partner company that created the project realizes that it needs the help of a partner that specializes in hardware to work on this project.

The partner can locate appropriate partners and add them to the project in two different ways:

- Use the Partner Locator to find partners with relevant skills, and create a collaboration with those partners, as described in *About Partner Collaboration*.
- Use the Partner Locator to find partners with relevant skills, and have the brand owner add them to the project team.

When they use the Partner Locator, partners can find appropriate companies by searching based on expertise, location, and other criteria. In this situation, the partner would enter a criterion such as Partner Type = Hardware.

After the initiating partner has found the appropriate partner to work with, the two partners can initiate a collaboration. Assuming the hardware partner accepts the collaboration, the initiating partner can add the hardware partner to the project team.

Alternatively, they can request the brand owner to add the hardware partner to the project team using the All Projects Across Organizations view in Siebel PRM Manager.

To use the Partner Locator

1. In the Siebel PRM Portal, the partner navigates to the Partner Locator screen.
2. The partner enters the appropriate search criteria, and clicks Search.

   A list of partners who match the criteria appears.

Adding Their Employees to the Project (Initiating and Invitee Partners)

Once the partner companies that need to be involved in a project have been added to the project, each partner company can add its own employees as users of the project. These users form the virtual project team.

> **Note:** All partner companies in the project must add their own employees to the project, to allow those employees to access information about the project.

To add partner employees to the project

1. In the Siebel PRM Portal, the partner navigates to the Projects screen.
2. The partner drills down on the name of the project.
3. The partner navigates to the Access view.
4. In the Access list, the partner adds a new records for each employee of that partner company who work on the project.

Working Together on the Project (Initiating and Invitee Partners)

All of the partner employees who have been added to the project can use the Siebel PRM Portal to view information about the project, such as the project summary, and to add information to the project, such as activities, contacts, invoices, notes, risks, service requests, status reports, tasks, and other information.

Any partner employee who is on the project can see the information that the other partners have added.

To add or view information about the project

1. In the Siebel PRM Portal, the partner navigates to the Projects screen.
2. The partner drills down on the name of the project.
3. The partner navigates to the appropriate views to add or view information about the project.

Tracks the Partners' Work (Brand Owner)

The brand owner can view the project to track its progress, even though the project was set up by partners independent of the brand owner.

The brand owner can view all projects, even if it has not explicitly been made a member.

To track the partners' work on the project

1. In the Siebel PRM Manager, the brand owner navigates to the Projects screen, then selects All Projects Across Organizations.
2. In the Projects list, the brand owner selects the project.
3. The brand owner navigates to the appropriate views to view information about the project.

14 Managing Design Programs

Managing Design Programs

This chapter describes how to use Siebel PRM to create and manage design programs. It contains the following topics:

- *About Design Programs*
- *Scenario for a Partner or Distributor Creating a Design Program*
- *Scenario for a Vendor Creating a Design Program*
- *Roadmap for Managing a Design Program*

About Design Programs

A design program is a collaborative activity involving two organizations:

- The first organization makes products that can be included as a component in various products.
- The second organization manufactures products that might include the former's components.

Often, but not always, design programs also involve a third organization, which is a business partner (distributor, reseller, and so on) of the first organization. Typically, the first organization is referred to as the component manufacturer (or, component supplier), and the latter as the Original Equipment Manufacturer (OEM).

A design program is an opportunity business component that includes one or more design opportunities. A design opportunity is a convenient mechanism to divide a design program into smaller activities, so that you can track and manage them independently. For example, different people might have to approve different parts of a design program. Subdividing the design program into several design opportunities allows you to accomplish assign it to different people.

In addition, a design opportunity might include one or more design registrations. A design registration is a mechanism to establish exclusive rights over a design opportunity. The design registration process is designed, so that a design opportunity can have only one approved design registration at any time.

Note: A design registration is always associated with a design opportunity, which in turn is always associated with a design program.

About Design Program Users

The following users use design programs:

- **Component manufacturer.** Refers to the organization that manufactures products (components) that can be included in other products. Typical examples of component manufacturers are companies that produce semiconductor chips (included in electronic devices), special light bulbs (used in automobiles), and so on. Component manufacturers are sometimes also referred to as component suppliers or vendors. In the context of this chapter, the terms component manufacturer, component supplier, and vendor are synonymous, and refer to the organization that has deployed Siebel PRM to interact with its business partners.

- **Distributor.** Refers to an organization that has a business relationship with the component manufacturer. The nature of the business relationship typically includes, but is not restricted to, reselling the component manufacturer's products to other organizations, such as OEMs, other distributors or resellers, retail end customers, and so on.
- **Original Equipment Manufacturer (OEM).** Refers to a company that includes components made by one or more component manufacturers within its own products. A typical example of an OEM might be the manufacturer of a computer that includes the semiconductor chip as one of its components. This chip is made by a component manufacturer.

Scenario for a Partner or Distributor Creating a Design Program

In this scenario, a technology company is selling its products through an indirect sales network that consists of partners or distributors around the world.

A licensed partner of this technology company specializes in reselling the latter's memory chips, video cards, transistors, capacitors, and so on to several OEMs in the high-tech industry. A sales representative at the partner company has developed a good working relationship with several OEM contacts. He gets information that one of the OEMs that the partner company supplies to is designing a high-end server. He gathers that the design is still at an early stage, and the OEM is actively sourcing suitable components to include in the final design. He realizes that some of the components manufactured by a technology company are good candidates for inclusion in the new server product.

The sales representative logs in to Siebel Partner Portal, and creates a new design program. He indicates that he is working with an established design firm with an in-depth knowledge of a technology company's products, during the design phase.

After creating the design program, he identifies the technology company products that might be considered for inclusion in the new server product. Because several technology company products are likely to be evaluated by the OEM for inclusion in its server, he logically groups them by some criteria, such as function, win probability, and so on. For each logical product group, he creates a design opportunity. The design program now consists of one or more design opportunities, with each opportunity encapsulating a set of a technology company products.

After creating the design opportunities, the sales representative registers them with the technology company. Registering the design opportunity formally establishes that it belongs to the partner company, thus preventing poaching by other partners or even by the direct sales force of the technology company. A formal establishment of ownership is also crucial to earn expected financial incentives, such as commissions, bonuses, discounts, and so on.

The design registration administrator at the technology company logs in to Siebel Partner Manager and navigates to the Design Registrations List view and drills down to the specific registration. The drill-down presents the administrator with a single-page view of the design registration, which includes details about the registration, the parent design opportunity, the grandparent design program and any potential duplicate registrations. This information enables her to make an informed decision on whether to approve, reject or return the design registration.

The design registration administrator is satisfied that the design registration provides a legitimate option to expand the company's business, and gives her approval.

The technology company's approval indicates that the technology company has accepted the partner company's claim of ownership of the specific design opportunity, and is a crucial pre-requisite for subsequent financial compensation if the initiative eventually succeeds.

As the design progresses, the partner company sales representative adds notes, records activities, and uploads attachments to both the design program as well as the appropriate design opportunities. He also captures any changes that might be pertinent to the design program, such as the number of servers estimated to be sold annually by the OEM.

Once the partner company sales representative and the OEM team finalize the configuration of the server, the sales representative logs back in to Siebel Partner Portal, and requests concurrence from the technology company to upgrade the status of the design opportunity to Design Win. The technology company has configured their Siebel Business Application in such a manner that requests for upgrading to Design Win have to be approved by a design registration administrator. Therefore, the administrator is notified that a design opportunity must be approved. She logs in to Siebel Partner Manager, checks the details specified on the design opportunity, and approves it. The status of the design opportunity is updated to Design Win.

Around the same time, the OEM finalizes the design for its server and decides to move it into production. This represents the beginning of a constant revenue inflow for the technology company because its components are present in the new server product. Therefore, from the technology company's perspective, this is a business event of substantial significance. To reflect this fact, a sales representative updates the phase of the design program to Production. This update triggers two processes - creation of a revenue template and creation of a forecast series. The revenue template contains a line item for every product on every design opportunity that brings in revenue. Simultaneously, a forecast series is also created for the design program. The period on the forecast series is set to be the same as that of the design program by default, and the search specification is set to include only the revenue directly associated with the design program.

As the OEM begins to ramp up the manufacture of its new high-end server, it has a need for the technology company's components. Therefore, the OEM gets in touch with the partner company and requests to buy the technology company’s components that are included in the server. The partner company’s sales representative requests a Special Pricing Authorization from the technology company, so that he can get a higher margin when reselling to the OEM. For more information about Special Pricing Authorization, see *Working with Special Pricing Authorization*.

Scenario for a Vendor Creating a Design Program

In this scenario, distributors are not involved, and the component manufacturer interacts directly with the OEM. Because design registrations are a mechanism for distributors to specify that a noncompetitive situation exists for their design opportunities, they are typically not required in such situations. Additionally, special pricing authorizations are not required in this scenario, because there are no distributors involved. However, for the purposes of internal revenue forecasting and tracking, the vendor might still create the design program (and the associated design opportunities) using Siebel Partner Manager.

A technology company produces many different products, such as printers, motherboards, servers, circuit boards, and so on.

The OEM is the end customer that buys products from the technology company to include within their own products, and subsequently sells them under their own brand name.

- The technology company sales representative establishes direct contact with the OEM to find out more about the new server they are designing and developing. After gathering sufficient information, he logs in to Siebel Partner Manager, and creates a design program.
- The sales representative creates design opportunities to logically group components that the OEM is considering to include in its new server. He works with engineers in his company (or, through an external design firm) to finalize a configuration that is compatible with the new server product. The OEM evaluates the proposed configuration and, after further refinements to the design, accepts it. The sales representative

updates the design opportunity status and design program phase appropriately. A revenue template and forecast series are created in the background when the design program is updated to Production, thus facilitating forecasting. The OEM now places its order with the technology company.

Roadmap for Managing a Design Program

To manage a design program, perform the following process and tasks:

1. *Process of Setting Up a Design Program*
2. *Creating a Design Program*
3. *Creating a Design Opportunity (Partner)*
4. *Creating a Design Registration (Partner)*
5. *Approving a Design Opportunity*
6. *Approving a Design Registration*

Process of Setting Up a Design Program

To set up a design program, perform the following tasks:

1. *Configuring Design Opportunity Status*
2. *Defining Design Opportunity Approvers*
3. *Defining Design Registration Approvers*

Configuring Design Opportunity Status

You can configure the statuses associated with a design opportunity, and you can modify them to suit specific business requirements. You can rename the status values and their associated win probabilities. You can also specify whether a specific design opportunity status is treated as being open, won, or lost. This feature is important, because the values that you specify influence the approval process, revenue figures, and so on.

Design opportunities use the status values associated with only two sales methods: design opportunity sales method and design opportunity won sales method. Therefore, limit your configuration changes to these two sales methods only.

To configure a design opportunity status

1. Navigate to the Administration - Data screen, then the Sales Methods view.
2. Query for the Sales Method of either Design Opportunity or Design Opportunity Won, and make changes as appropriate.

Defining Design Opportunity Approvers

Define a list of users who must approve a design opportunity before the status changes to win.

To define a design opportunity approver

1. Navigate to the Administration - Application screen, then the Approval Admin view.
2. Query for the Approval Item of Design Opportunity Approval.
3. In the Approval Stage list, add records and specify users or positions who must give their approval for a design opportunity to be considered a win.

You can also specify whether the approval process is sequential or parallel. In the sequential process, all listed users must approve. In the parallel process only one user must approve. For more information on the approval administration process, see *Siebel Applications Administration Guide* .

Defining Design Registration Approvers

Define users or positions that must approve a design registration.

To define a design registration approver

1. Navigate to the Administration - Application screen, then the Approval Admin view.
2. Query for the Approval Item of Design Registration Approval.
3. In the Approval Stage list, add records and specify users or positions who must give their approval for a design registration to be considered a win.

Creating a Design Program

Before you can create a design registration, you must create a design program.

This task is a step in *Roadmap for Managing a Design Program*.

To create a design program

1. Navigate to the Design Programs screen.
2. In the design programs list, add a new record.
3. Complete the necessary fields. Some fields are described in the following table.

Field	Description
End Customer	Name of the organization for which the design program is being considered.
Partner	The partner or distributor organization that acts as the liaison between the component supplier and the end customer. This field typically remains blank if the component supplier interacts directly with the end customer. **Note:** This field is informational and does not control access to the design program. In Siebel Partner Portal, this field displays the organization of the active position by default. It is always read-only. In Siebel Partner Manager, this field does not display any value by default. Additionally, it can be modified, enabling the partner manager to specify a partner.
Potential Revenue	The sum of open revenue and won revenue.
Phase	The current stage of the design program.

Field	Description
Production Probability	Denotes the probability that the design program might result in revenue for the component supplier.
Organization	This field is set to the organization of the active position of the creator in both Siebel Partner Manager and Siebel Partner Portal by default. This field controls access to the design program; that is, users of organizations specified in this field can gain access to it.
Estimated Units	Estimated units for each period. This field is an estimate of how many units of the program the end customer is likely to manufacture in the unit of time specified in (time units); that is, month, quarter, year, and so on.
Probability Reason	Description of the reasoning behind the specified production probability.
Primary Design Account	Name of the design firm designing the product. Frequently, the end customer is also the design firm, but OEMs also work with a design firm or OEM.
Time Unit	The values are: weeks, months, quarters, years.
Primary Design Rep.	Informational field. Indicates the main point-of-contact for the design program.
Assigned To	Informational field. The individual who has overall responsibility for the design program.

Several fields on a design program become read-only when the phase is one of the following: production, cancelled, or end of life. A design program has several views. Navigate to the different views to see more information about the design program.

Creating a Design Opportunity (Partner)

Design opportunities are used to divide a design program into smaller activities, so that you can track and manage them independently.

This task is a step in *Roadmap for Managing a Design Program*.

To create a design opportunity

1. In the Partner Portal, navigate to the Design Programs screen.
2. Select an existing design program for which you want to create a design opportunity.
3. Drill down on the design programs record, and navigate to the Design Opportunities view.
4. Enter the products you want to include in the design opportunity, as well as expected revenue. Complete the other fields as appropriate.

5. To submit the design opportunity for approval, click Submit for Win.
6. The design opportunity is routed to the configured approvers.

Creating a Design Registration (Partner)

Design registrations are used to establish exclusive rights over a design opportunity. The design registration process is designed, so that a design opportunity can have only one approved design registration at any given point in time.

This task is a step in *Roadmap for Managing a Design Program*.

To create a design registration

1. In the Partner Portal, navigate to the Design Programs screen.
2. Select an existing design program for which you want to create a design registration.
3. Drill down on the design programs record, navigate to the Design Opportunities view, and then to the Registrations view.
4. add a new record to create a design registration, enter information about the design, and save the record.
5. To submit the design registration for approval, select Submitted in the Status field.
   The design registration is routed to the configured approvers.

Approving a Design Opportunity

The approval process for a design opportunity is initiated when a partner or vendor selects the opportunity and navigates to Submit for Win.

This task is a step in the *Roadmap for Managing a Design Program*.

To approve a design opportunity

1. Navigate to Administration - Inbox screen, then the All Submitted Items view.
   A design opportunity that requires approval is displayed in the inbox of the current approver.
2. In the More Info form, in the Action field, select Approved or Rejected. opportunity.
   If and when the final approver approves, the status of the design opportunity changes to Win.
   When the status becomes Win, most of the information on the design opportunity becomes read-only.

Approving a Design Registration

The approval process for design registrations makes sure that a similar request has not been submitted by another partner. For example, several distributors might identify a potential opportunity and try to submit a design registration against it. The vendor might want to specify that only one distributor registers the opportunity, so it is essential to provide the approver with a mechanism to identify potential duplicates.

Potential duplicate design registrations are identified based on the following criteria:

- They have at least one product in common on the parent design opportunity.

- They have the same end customer.
- The status of the potential duplicate registration is Submitted, Approved, Pending Review, Rejected, or Expired.

Only those design registrations created in the past *n* days are considered. In the preconfigured version of Siebel PRM, *n* is 366 days by default. However, customers can modify this number to suit their business needs.

This task is a step in *Roadmap for Managing a Design Program*.

To approve a design registration

1. Navigate to Administration - Inbox screen, then the All Submitted Items view.

   A design registration that requires approval is displayed in the inbox of the current approver.
2. Drill down on the design registration to the single page view.
3. Check if there are potential duplicates by navigating to the Similar Registrations view.
4. In the More Info form, in the Action field, select Approved or Rejected.

   If and when the final approver approves, the status of the design registration changes to Approved.

15 Working with Special Pricing Authorization

Working with Special Pricing Authorization

This chapter describes how to set up and use Special Pricing Authorization (SPA). It contains the following topics:

- *About Special Pricing Authorization*
- *Scenario for Initiating an SPA Request*
- *Process of Setting Up Special Pricing Authorization*
- *Process of Managing SPA Quotes and Claims*
- *About SPA Workflows*

About Special Pricing Authorization

SPA (also referred to as Ship from Stock and Debit or Distributor Margin Management) is a collection of quote and claim processes designed to promote margin protection for the distributor. SPA includes the following two modules:

- Special Pricing Authorization Management
- Special Pricing Claims Management

Certain conditions can trigger an SPA request, for example:

- **Competitive pricing.** The distributor asks the supplier for lower, off-book pricing, to meet a specific competitive transaction. The off-book pricing is valid only for that unique, end-customer opportunity.
- **Supplier book price reductions.** When a supplier lowers book prices due to shifts in the overall market, the distributor requests a credit for the difference for any inventory or future purchases to maintain a reasonable margin.

Scenario for Initiating an SPA Request

This topic provides an example of how SPAs might be used. You might use SPAs differently, depending on your business model. In this scenario, a distributor initiates an SPA request.

A component manufacturing company specializes in the manufacture of a wide variety of electronic components used in personal computers, servers, and diagnostic equipment. It uses licensed distributors to distribute its products.

A sales manager in the licensed distributor learns of a potential opportunity with an OEM that OEM manufactures servers and personal computers and requires a specific type of computer chip that the component manufacturing company manufactures. The sales manager approaches the OEM with an offer of $300 for each chip. the OEM replies that a distributor for one of the component manufacturing company' competitors, is offering an equivalent chip for $275 for each unit. After extensive discussions with the OEM, it is clear to the sales manager that price is the deciding factor in the sale.

The licensed distributor bought the chips from The component manufacturing company for $250 for each unit and resells them for $300. This results in a 20% profit margin. If the licensed distributor were to match the CRMax price of $275, it would only make a 10% profit margin on the deal with the OEM.

To realize a profit margin closer to the usual twenty percent, the sales manager submits a Special Pricing Authorization request using Siebel Partner Portal. He suggests that the component manufacturing company sell the chips at $230 for each unit to the licensed distributor, which then resells them to the OEM at $275 for each unit. This sale would result in a 19.5% profit margin for the licensed distributor.

Using Siebel Partner Manager, a representative from the component manufacturing company reviews the SPA request from the licensed distributor. The representative then suggests that the licensed distributor pay $235 for each unit, and resell them to the OEM for $275. This sale would result in a 17% profit margin.

The sales manager accepts the price suggested by the component manufacturing company and offers to sell the chips at $275 to the OEM. The OEM accepts the offer, and the sale is completed.

Process of Setting Up Special Pricing Authorization

To set up SPA, perform the following tasks:

1. *Setting Up the SPA Approval Flow*
2. *Activating HTIM SPA Workflows*
3. *Setting Up Price Lists*
4. *Assigning a Price List to a Partner*

Setting Up the SPA Approval Flow

Setting up the SPA approval flow involves defining a list of users who are required to approve SPA quotes and defining whether SPA approval is parallel or sequential.

This task is a step in *Process of Setting Up Special Pricing Authorization*.

To set up the SPA approval flow

1. Navigate to the Administration - Application screen, then the Approval Admin view, and then click Query.
2. In the Approval Item field, enter SPA Quote Approval, and click Go.
3. In the Approval Flow Type field, do one of the following:
    - Select Parallel if only one user is required to approve an SPA quote.
    - Select Sequential if SPA quotes must be approved by multiple users.
4. In the Approval Stage subview, define the list of users or positions that are required to approve SPA quotes.

Activating HTIM SPA Workflows

This task is a step in *Process of Setting Up Special Pricing Authorization*.

To activate HTIM SPA workflows

1. Navigate to the Administration - Business Process screen, then the Workflow Deployment view, and then click Query.
2. In the Name field, enter HTIM SPA, and click Go.
3. Activate all the HTIM SPA workflow processes.

Setting Up Price Lists

If you want to use default product prices for SPA, you must set up the appropriate price lists.

This task is a step in *Process of Setting Up Special Pricing Authorization*.

To set up price lists

- Do one of the following:
  - Create a new price list, if necessary.

    For more information on creating price lists, see *Siebel Pricing Administration Guide* .
  - Use an existing price list, and verify that all products to be used in SPA are included.

Assigning a Price List to a Partner

The final SPA setup task is to assign a price list to each partner.

This task is a step in *Process of Setting Up Special Pricing Authorization*.

To assign a price list to a partner

1. Navigate to the Administration - Partner screen, then the Registered Partners view, and drill down on the appropriate partner.
2. In the More Info view, select the appropriate price list.

Repeat this procedure for all partners involved in SPA.

Process of Managing SPA Quotes and Claims

The distributor and supplier submit and manage SPA quotes and claims by performing the following tasks:

1. *Submitting an SPA Quote*
2. *Submitting an SPA Claim*
3. *Validating an SPA Claim*

Submitting an SPA Quote

Distributors must use Siebel Partner Portal to submit SPA quotes.

An SPA quote can contain multiple line items. Each line item represents a special pricing request for a specific product. The distributor must first create and save the SPA quote before adding line items to it. When the quote is complete, the distributor submits it to the supplier.

A vendor can create and submit an SPA quote on a partner's behalf using Siebel Partner Manager. The following steps apply to both Siebel Partner Portal and Siebel Partner Manager.

This task is a step in *Process of Managing SPA Quotes and Claims*.

To submit an SPA quote

1. In Siebel Partner Portal or Siebel Partner Manager, navigate to the SPA Quotes screen.
2. Add a new record to create an SPA quote, and enter information about the quote.

   Some fields are described in the following table.

Field	Description
Registration ID	The design program that is associated with the components for the project.
End Customer	OEM manufacturer in whose end products the components are used.
Resale Customer	The customer who buys the part. The customer is often a contract manufacturer. A contract manufacturer produces the final, finished product on behalf of an OEM manufacturer (end customer).
Total Exposure	Sum of all the Total Line Item Cost field values for all approved line items.
Last Name	The name of a contact at the distributor organization. This field is auto-populated with the login name. You can modify this field.

3. Click Save.
4. Drill down on the new SPA quote, and create a new record in the Line Item Detail form beneath the Line Items list.
5. Enter information about the line item.

   Some fields are described in the following table.

Field	Description
Product	Component for which the distributor is requesting special pricing.

Field	Description
Quantity	Total number of units for which the distributor is requesting special pricing.
Competitor Name	Name of the competitor for the component listed in the line item.
Competitor Product	Name of the competitive product.
Competitor Part Price	Price of the competitive product.
Purchase Cost	Price the distributor originally paid to purchase the components.
Requested Cost	Special (reduced) pricing that the distributor is requesting.
Authorized Cost	Cost authorized by the supplier.
Book Cost	Price at which the component was originally sold to the distributor by manufacturer.
MSRP	The manufacturer's suggested retail price.
Requested Resale Price	Resale price at which the distributor wants to sell the components.
Suggested Resale Price	Resale price suggested by the manufacturer.
Total Line Item Cost	Quantity of the line item multiplied by the difference between the authorized and requested costs.

6. Repeat Step *Submitting an SPA Quote* for each additional line item in the SPA quote.
7. When the SPA quote is completed and ready for approval, click Submit.

> **Note:** The Line Items view for the SPA quote becomes read-only. To enter or change line items, set the status to Recalled, and click Save. You can then modify the line items.

The SPA quote is automatically assigned to the partner manager responsible for the given distributor.

Reviewing and Approving SPA Quotes

When the supplier receives an SPA quote request, the partner manager reviews it, evaluating the individual line items, comparing it to similar quotes received for the same end customer, and finally either approves or rejects the quote.

Depending on how SPA was set up, multiple approvers might be required. For more information on the SPA approval flow, see *Setting Up the SPA Approval Flow*.

An approved quote automatically creates a pricing agreement. For more information about agreements, see *Siebel Field Service Guide* . The agreement is created by the Siebel HTIM SPA Quote Approval Workflow process. For more information about the SPA Quote Approval workflow process, see *HTIM SPA Quote Approval Workflow*.

This task is a step in *Process of Managing SPA Quotes and Claims*.

To review and approve or reject a pending SPA quote

1. Navigate to the SPA Quotes screen.
2. In the SPA Quotes list, drill down on an SPA quote that has a status of Submitted.
3. Review the line items for the selected SPA quote. For each line item:
   - Modify the Authorized Cost field, as needed.
   - Modify the Suggested Resale Price field, as needed.
   - Set the status as appropriate. Each individual line item must be reviewed before the entire SPA quote can be approved.
4. Navigate to the Similar Quotes view to see other SPA quotes that are potential duplicates.
5. Review the listed quotes to verify pricing on similar parts to maintain pricing integrity across quotes.
6. In the SPA quote form, set each line item to Approve, Reject or Return.
7. Click Commit Actions to automatically change the Status of the SPA quote.

   The following list describes the possible outcomes:

   - If a line item is set to Reject or Return, the Status is immediately updated to Rejected or Returned. No further approval action is required.
   - If a line item is set to Approve and no other approvers are required, the Status is immediately updated to Approved. Otherwise, the status remains Pending Review.
   - If any line items are still Pending Review, the entire SPA quote is routed to the next approver.
   - If there are no Pending Review items but at least one Returned item, the entire SPA quote is returned to the submitter.
   - If there are no Pending Review or Returned items, the SPA quote is fully approved, and a pricing agreement is created.

Use the following procedure to review an agreement for an SPA quote.

To review an agreement for an SPA quote

1. Navigate to the SPA Quotes screen.
2. Drill down on an SPA quote that has a status of Approved or Partially Approved.
3. Navigate to the Agreement view to see the agreement generated for the SPA quote.
4. Drill down on the agreement name for more information on the agreement.

   The Entitlements - Price Details view appears. Some of the fields in the Price Details list are described in the following table.

Balance Quantity	Number of parts not yet claimed through the SPA claim process. The value automatically decreases with each approved SPA claim.

Approved Quantity	Number of parts quoted in the approved SPA.
Field	Description
Purchase Cost	Price at which the distributor purchased the parts.
Suggested Resale Price	Price suggested by the distributor. This price prevents excessive margins.
Authorized Cost	The agreed, reduced-purchase cost, based on the SPA quote.

Note: The agreement entitlement is valid for three months starting from the day of approval. You can change the period by modifying the QUOTE_EXPIRATION_PERIOD LOV. See *Siebel eSales Administration Guide* for details on how to set the quote expiration dates.

Submitting an SPA Claim

An SPA claim is a request by a distributor to reimburse a lost margin. When SPA quotes have been approved by the supplier, and an agreement with SPA-approved pricing entitlements is generated, the distributor can submit SPA claims against the entitlement.

Distributors can submit claims through Siebel Partner Portal. You can also import the claim data from external systems into Siebel PRM by using Siebel EAI. For more information about Siebel EAI, see *Integration Platform Technologies: Siebel Enterprise Application Integration* .

Point-Of-Sale Reports and SPA Reports

SPA claims are submitted by the distributor as line items in an SPA report. Point-of-sale (POS) reports and SPA reports are directly related. Both reports contain multiple line items grouped together for transmission purposes only. Each line item describes a different sales transaction with an end customer. SPA reports contain line items identified as claims. The *claims* are transactions for which the distributor wants to be credited. Each claim line item must be verified against the appropriate entitlement by the supplier.

POS reports are used:

- By the distributor to report sell-through data to the supplier
- By the supplier to track end-customer sales, which is useful for marketing purposes
- By the supplier to estimate sell-through volumes for design registrations, which is useful to see how sales compare with the sales goals in the design registrations, and to increase the accountability of the sales representatives

SPA reports are used to substantiate SPA claim line items. After distributors submit claims for lost margins to the manufacturer, the SPA report gives the manufacturer proof of the end-customer purchase volumes, which are used to generate credits for the distributor when prices are lower than the guaranteed margin. For more information on SPA claims, see the following.and *Validating an SPA Claim*.

The distributor must first create and save the SPA report record before adding line items to it.

This task is a step in *Process of Managing SPA Quotes and Claims*.

To create an SPA claim through Siebel Partner Portal

1. In Siebel Partner Portal, navigate to the SPA Claims screen.
2. In the form beneath the POS/SPA Reports list, create a new SPA report record, and enter information about the report.

   Some fields are described in the following table.

   Note: You can see some of the following fields only after you save and drill down on the record.

Field	Description
Distributor Report ID	Report identifier for the distributor.
Mfg Report ID	Report identifier for the manufacturer.
Type	Distinguishes between POS and SPA Claim reports.
Distributor	Read-only name of distributor company, the parent organization of the current login.
Debit Note #	Typically, a number that comes from the supplier's accounting system. After the claim is approved, the accounting system generates a debit or credit note for payment to the distributor.
Claim Cost	The total value of the approved line items on a validated claim. This is the cost of the claim to the supplier, and the amount of the credit to the distributor.
Currency Code	Currency for the overall Claim/POS report, if not specified at the line item.
Exchange Date	Currency conversion date. Used to identify the internal currency conversion table.

3. Click Save.
4. Drill down on the SPA record, and create a new line item record in the Line Item Detail form.
5. Enter information about the line item.

   Some fields are described in the following table.

Field	Description
SPA Entitlement #	Pick list of approved and active SPA entitlements for the distributor.

Field	Description
Branch Office	Distributor's branch office.
End Customer	The OEM account related to the SPA claim.
End Customer Address	Address for the OEM account (end customer).
Resale Customer/Address	Account address to which the parts were sold and delivered.
Ship To Customer	Account to which the product identified on the line item was shipped.
Product	Manufacturer's product sold.
GTIN#	Global product identifier. A unique reference number for the manufacturer's product.
Shipped Quantity	Quantity shipped by the distributor to the end customer.
Ship Date	Distributor's ship date to the end customer.
Design Registration #	ID of the design registration under which this transaction was executed.
Transaction Status	Status of the individual line item.
Deviation	The difference between the amount submitted by the distributor on the claim and the amount originally agreed upon in the agreement. Sometimes the authorized price or purchase cost submitted on the claim differs from the values specified on the agreement, which generates a deviation.

Use the following procedure to submit an SPA Claim report.

To submit an SPA claim report

1. In Siebel Partner Portal, navigate to the SPA Claims screen, and select an SPA quote of status In Progress.
2. Set the status to Submitted, and click Save.

   The Line Items view for the SPA Claim becomes read-only.

Validating an SPA Claim

This task is a step in *Process of Managing SPA Quotes and Claims*.

To validate an SPA claim

1. Navigate to the SPA Claims screen, and select an SPA report of status Submitted.
2. Click Validate.

   This step triggers the workflow process, SPA Validate Claim Items. For more information about the HTIM SPA Validate Claim Items Workflow, see *HTIM SPA Validate Claim Items Workflow*. The claim status is updated according to the results of the workflow. On the form beneath the SPA Claims list, the Claim Cost field shows the aggregate value of all approved claim line items.
3. Drill down on the report to review the transaction status of the individual line items associated with the SPA report claim.

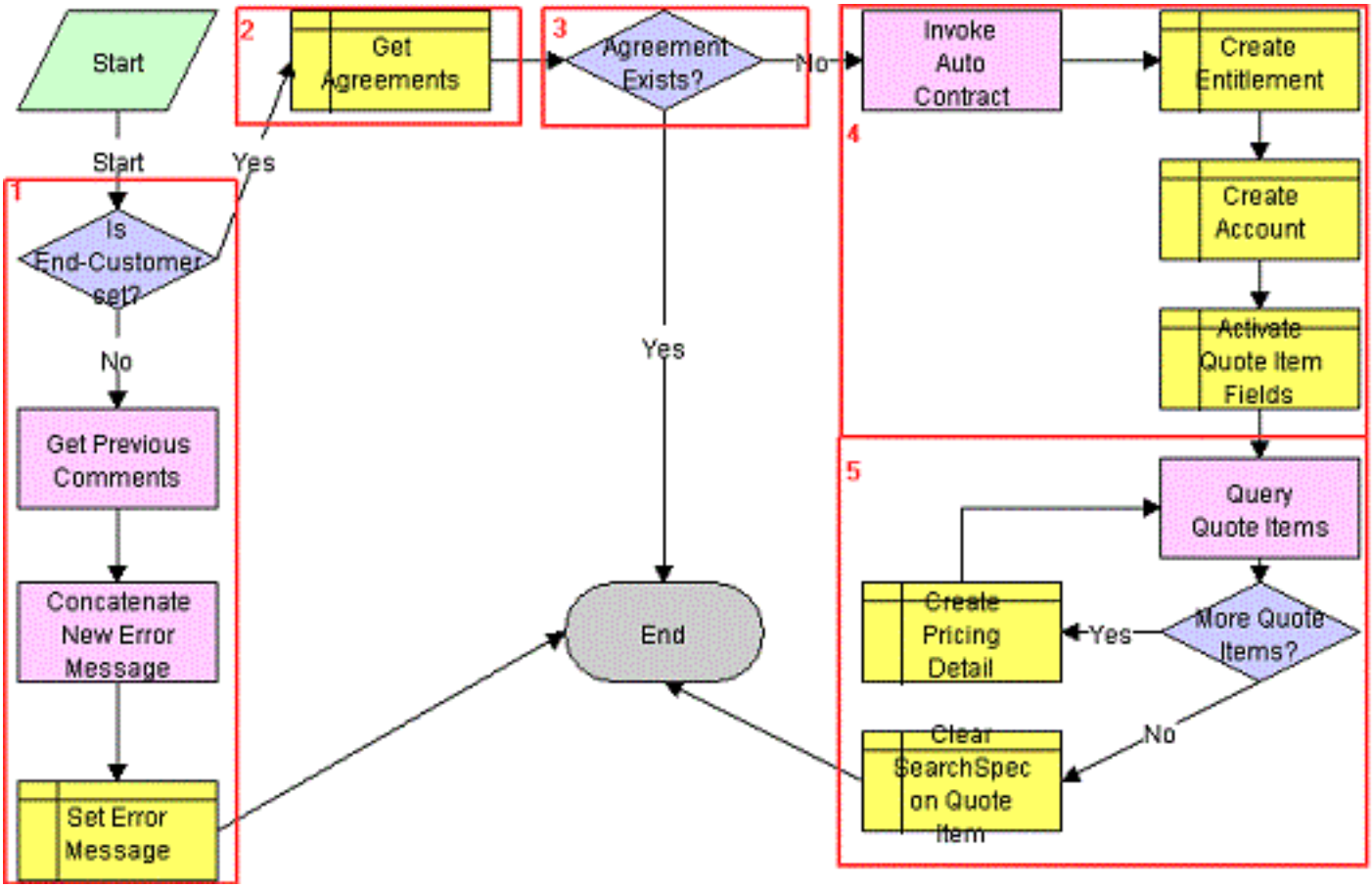
About SPA Workflows

Special Pricing Authorization includes the following workflows:

- *HTIM SPA Quote Approval Workflow*
- *HTIM SPA Validate Claim Items Workflow*

HTIM SPA Quote Approval Workflow

This workflow, illustrated in the following diagram, creates a pricing agreement when the status of an SPA quote is changed to Approved. The agreement is created with one entitlement for price changes and overrides the price list applicable for the given distributor account. For every SPA quote line item with status Approved in the SPA quote, an Entitlement Price Detail line item is created, stating the part number under consideration, the quantity approved, the balance quantity as well as the authorized price and purchase price (the price at which the distributor originally purchased the parts).



As shown in this diagram, the steps in this workflow are as follows:

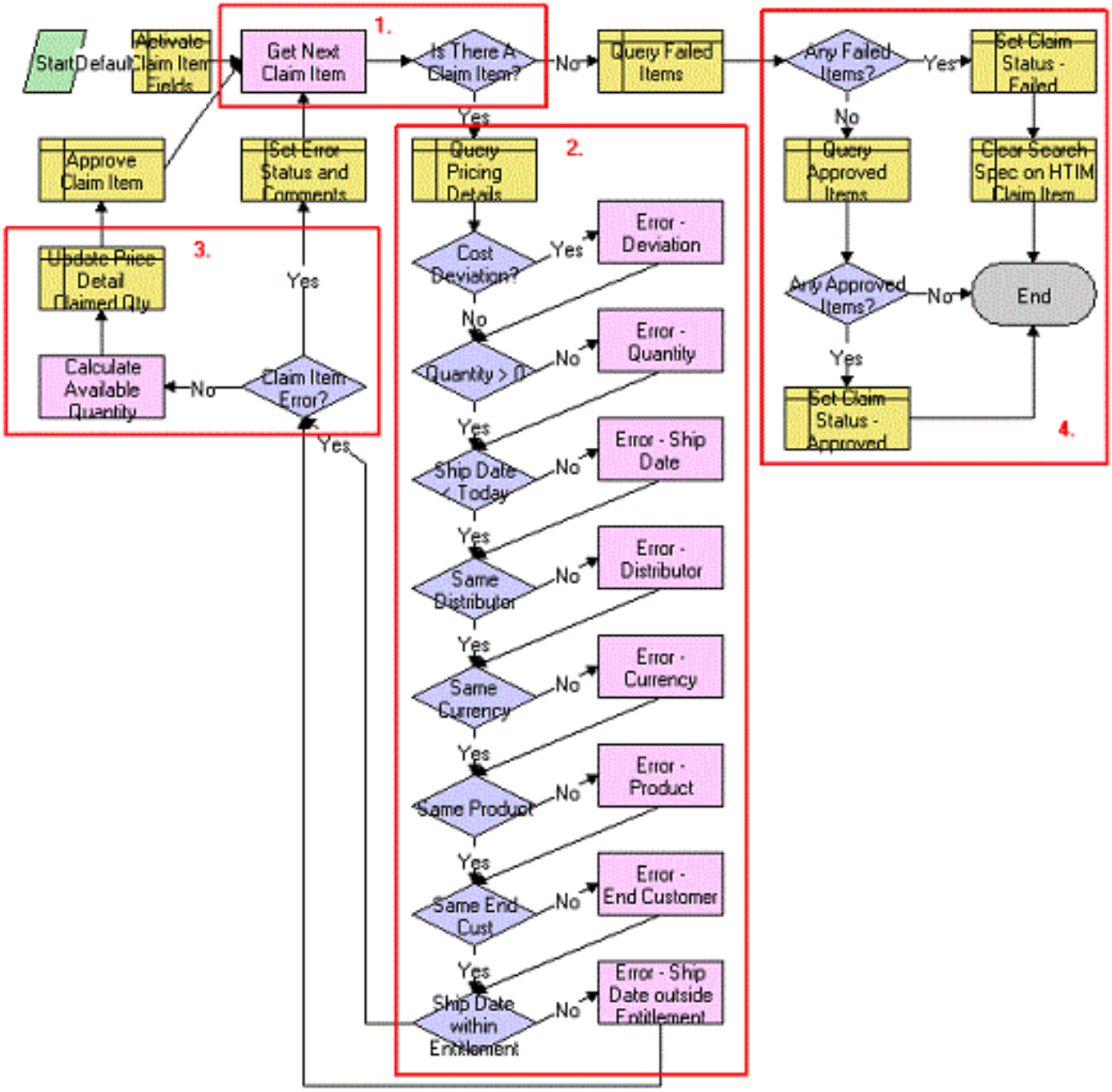
1. If no end customer is defined at the quote header level when the quote status is changed to approved, the workflow stops without generating an agreement and enter the value "End Customer must be set. No agreement generated" concatenated with other information in the Rejection Reason field for the quote back into Rejection Reason.

   The Siebel Business Application includes a state model that requires the end customer ID be specified for state transition from In Progress to Submitted or from Recalled to Submitted.
2. The Siebel CRM system verifies that there is no existing agreement for the given SPA by querying the list of agreements in the Siebel database. This step promotes integrity of the data.
3. If an agreement exists, the workflow ends. If no agreement exists, the workflow creates a new agreement.
4. After the agreement is created, one single entitlement is created under the agreement. This entitlement captures the pricing details for the different parts on SPA quote line items with status Approved. Under Accounts, the workflow adds the account record for the end customer, because this is the only account the given entitlement is applicable for. For more information about agreements, see the *Siebel Field Service Guide* .

5. After the entitlement is created, the workflow goes through the individual SPA quote line items one by one and:
    a. Creates a new Price Detail record for every quote line item with status Approved.
    b. Sets the corresponding pricing values, as agreed upon within the quote, such as part number, approved quantity, purchase cost, suggested resale price, and authorized cost. The balance quantity is initially set to equal the value of the approved quantity.

HTIM SPA Validate Claim Items Workflow

This workflow, illustrated in the following diagram, steps through a claim, line item by line item, and validates the line items against the corresponding SPA agreement.



As shown in this diagram, once started, the workflow goes through each line on the claim and performs the following operations:

Once started, the workflow goes through each line on the claim and performs the following operations:

1. The workflow identifies if there is another claim line item to validate or not.

2. If there is an additional claim line item to validate, the workflow performs the following checks:

    a. Looks up the corresponding agreement/entitlement for the line item under consideration based on the value stated on the claim line item and gets the corresponding "Price Details" as captured under the entitlement.
    b. Calculates the cost deviation between the values stated on the claim and the value as agreed upon under the agreement (that is, the difference between {Authorized Cost-Purchase Cost)*Quantity} on claim and price detail). The tolerance on the deviation is set to 0. You can set the value to the tolerance you deem acceptable by modifying the conditional expression behind the decision point.

        - If the deviation is acceptable, the workflow moves on to the next decision step.
        - If the deviation is not acceptable, the workflow sets the Rejection Reason on the claim line item to *Difference between Quoted Credit and Distributor Claimed Credit* and moves on to the next validation step.

    c. Verifies whether the claimed quantity is greater than 0.

        - If it is, the workflow continues with the next validation step.
        - If it is not, the workflow sets the Rejection Reason on the claim line item to *Claimed Quantity is <= 0* and moves on to the next validation step.

    d. Verifies whether the ship date is greater than today. Claims can only be submitted by the distributor after the product has been shipped to the end customer.

        - If it is, the workflow continues with the next validation step.
        - If it is not, the workflow sets the Rejection Reason on the claim line item to *Ship Date cannot be in the future*, and moves on to the next validation step.

    e. Verifies whether the distributor on the claim is the same as the distributor on the entitlement.

        - If it is, the workflow continues with the next validation step.
        - If it is not, the workflow sets the Rejection Reason on the claim line item to *Distributor does not match with Entitlement Distributor*, and moves on to the next validation step.

    f. Verifies whether the claim currency is the same currency as the agreement currency.

        - If it is, the workflow continues with the next validation step.
        - If it is not, the workflow sets the Rejection Reason on the claim line item to *Currency does not match with Entitlement Currency*, and moves on to the next validation step.

    g. Verifies whether the product ID on the claim line item corresponds to the product ID on the agreement.

        - If it does, the workflow continues with the next validation step.
        - If it does not, the workflow sets the Rejection Reason on the claim line item to *Product does not match any Price Detail Product in the Entitlement*, and moves on to the next validation step.

    h. Verifies whether the end customer on the claim corresponds to the end customer on the agreement.

        - If it does, the workflow continues with the next validation step.
        - If it does not, the workflow sets the Rejection Reason on the claim line item to *End Customer does not match with Entitlement End Customer*, and moves on to the next validation step.

    i. Verifies whether the ship date stated on the claim is within the validity period of the entitlement.

        - If it is, the workflow continues with the next validation step.
        - If it is not, the workflow sets the Rejection Reason on the claim line item to *Ship Date is not within Entitlement Start Date and End Date*, and moves on to the next workflow step.

3. If the line item was processed without errors, the workflow calculates the new balance quantity (original balance minus shipped quantity) on the corresponding entitlement price detail and sets the status of the claim line item to Approved.

   If not, the workflow continues with the next line item if available.
4. After all line items have been validated and set to a status of Approved or Failed, the workflow updates the status of the overall claim.
   - If any of the line items on the claim failed, the status of the claim is set to Failed.
   - If all line items were approved, the claim status is set to Approved.

You can extend the number of validation steps, if required. For instance, in certain situations, you might want to verify whether the resale price stated on the claim line item corresponds to the retail price requested by the manufacturer as captured in the agreement. This can be done by adding the validation step after the Ship Date within Entitlement validation step.

16 Working with Deal Registrations

Working with Deal Registrations

This chapter describes how to set up and use deal registrations. It contains the following topics:

- *About Deal Registrations*
- *Scenario for Registering a Deal*
- *Setting Up the Deal Registration Approval Flow*
- *Submitting a Deal Registration*
- *Approving a Deal Registration*

About Deal Registrations

Deal registration is a process by which a partner registers an opportunity with a vendor to make sure that the opportunity is not taken away or undercut by another partner or the vendor's direct sales force. Some of the key features of deal registration are as follows:

- **Flexible creation mechanism.** Both the vendor and partners can create and submit deal registrations. This mechanism enables partners who do not have access to Siebel PRM to enjoy the benefits of deal registration.
- **Configurable approval process.** The approval process associated with deal registrations is configurable. Approvers can be individuals or specific job roles. Approvals can be parallel or sequential. Multiple levels of approvals are supported.
- **Automatic expiration of approved registrations.** An expiration date can be set for a deal registration when it is approved. If a date was set, the deal registration automatically expires on the specified date. This feature enables the vendor to set expiration dates for deal registrations.
- **Approvers can view potential duplicates.** Deal registration includes built-in logic to identify potential duplicates. Before approving a deal registration, approvers can view other deal registrations that might be potential duplicates. This feature enables an approver to make an informed decision when approving a deal registration.
- **Enforcement of one approved registration for each opportunity.** The deal registration process automatically makes sure that an opportunity never has multiple, approved deal registrations.

Scenario for Registering a Deal

This topic provides an example of how deal registration might be used. You might use deal registrations differently, depending on your business model.

In this scenario, a partner creates a deal registration. A manufacturing company specializes in the manufacture of a wide variety of electronic components used in personal computers, servers, and software. It uses licensed distributor to sell its products.

A sales manager at one licensed distributor learns of a potential opportunity for a customer that requires several hundred CAD licences. Upon further discussion with the design team at the customer company, the sales manager is certain that their requirements can be met by one of the manufacturing company' products.

The sales manager wants to make sure that the time and effort he spends working on this opportunity is not wasted. The reality of the market is such that many companies compete for one opportunity. As such, he wants to make the manufacturing company aware of the fact that he was the first person to communicate with the design team at this customer about this opportunity. Submitting a deal registration with the manufacturing company makes sure that the opportunity is not poached by another partner or by the direct sales team at the manufacturing company.

The sales manager logs in to Siebel Partner Portal and creates a deal registration for the opportunity with this customer. He submits the deal registration for approval. One or multiple approvers at the manufacturing company review the deal registration. Among the various pieces of information that are reviewed is whether there are any other approved deal registrations for the same opportunity. The approvers find that all conditions have been met, and approve the sales manager's deal registration. He is now guaranteed that he has exclusive rights to this opportunity with this customer. Safe with the knowledge that he is the only person selling the manufacturing company' products to this customer for this specific opportunity, he now invests more time and effort in successfully closing the sale.

Setting Up the Deal Registration Approval Flow

Setting up the deal registration approval flow involves defining a list of users who are required to approve the deal registration, and defining whether the approval is parallel or sequential.

To set up the deal registration approval flow

1. Navigate to the Administration - Application screen, then the Approval Admin view, and then click Query.
2. In the Approval Item field, enter Deal Registration Approval, and click Go.
3. In the Approval Flow Type field, do one of the following:
    - Select Parallel only if one user is required to approve a deal registration.
    - Select Sequential if deal registration must be approved by multiple users.
4. In the Approval Stage subview, set the Approval Type, and define the list of users or positions that are required to approve deal registrations. Optionally, set the sequence of approvers.

Submitting a Deal Registration

Distributors must use Siebel Partner Portal to submit deal registrations. All deal registrations must be associated with a new or existing opportunity.

Vendors can submit a deal registration on a partner's behalf. The vendor uses Siebel Partner Manager. The following steps apply to both Siebel Partner Portal and Siebel Partner Manager.

To submit a deal registration

1. In Siebel Partner Portal or Siebel Partner Manager, navigate to Opportunities screen, then the List view.
2. Create a new opportunity, or drill down on an existing opportunity.

For more information on creating opportunities, see *Example of Partners Creating and Working on Opportunities*.

3. Navigate to the Registrations view.
4. Add a new record to create a deal registration, enter information about the deal, and save the record.
5. To submit the deal registration, change the status to Submitted.

The deal registration is sent to the vendor for review.

Approving a Deal Registration

When a deal registration is submitted, it is available for approval by the vendor.

To approve a deal registration

1. Navigate to the Administration - Inbox screen, then the All Submitted Items view.

   A deal registration that requires approval is displayed in the inbox of the current approver.
2. Drill down on the deal registration.
3. Check if there are potential duplicates by navigating to the Similar Registrations view.

   > **Note:** Opportunities identified as potential duplicates must share the same end customer and have at least one product in common.

4. Approve, reject or return the deal registration.

   If and when the final approver approves, the status of the deal registration changes to Approved.

Only one deal registration can be approved for each opportunity. If other deal registrations are submitted for the same opportunity, they appear in the registrations list, but you cannot approve them until the current approved registration expires.

17 Using Market Development Funds

Using Market Development Funds

This chapter describes how to use Siebel PRM to manage market development funds. It includes the following topics:

- *About Market Development Funds*
- *Creating Market Development Funds*
- *The Advanced MDF Option*

About Market Development Funds

Brand owners administer market development funds (MDFs) using Siebel PRM Manager, and partners can apply for market development funds on the PRM Portal. The Advanced MDF option provides additional partner program features. For more information on Advanced MDFs, see *The Advanced MDF Option*.

An MDF makes it possible to do joint marketing activities with one or more partners. For example, you might create an MDF to fund a joint advertising campaign with one of your large partners or to send several of your partners to a large trade show.

Process of Working with a Market Development Fund

To work with an MDF, perform the following tasks:

1. *Making Market Development Funds Visible to Partners*. You must configure the Siebel Business Application to make the fund visible in the partner portal.
2. *Creating Market Development Funds*. When you create a fund, you specify how much funding it has and which partners participate in it.
3. *Setting Up Fund Approval Authorization*. You must authorize your employees to approve fund requests. Employees have a fund request approval limit. If a request is greater than an employee's limit, that employee routes it to other employees for further review.
4. *Changing the Partner Manager Field*. Optionally, you can change the Partner Manager field to change the routing of fund requests for approval.
5. *Initiating a Fund Request*. After a fund has been created, employees of the partner company or from the brand owner company can request funding on behalf of partners who participate in the fund.
6. *Adding Attachments, Activities, and Activity Plans to MDF Requests*. It can be useful to add attachments, activities, and activity plans to an MDF request.
7. *Reviewing a Fund Request*. Your company must approve or reject funding requests. Optionally, you can use Siebel Business Process Designer to inform people by email when they must review a request or provide more information.
8. *Viewing a Fund's Checkbook*. The MDF checkbook lets you track the amount of credits, debits, and total funds available in a fund.

Making Market Development Funds Visible to Partners

This task is a step in *Process of Working with a Market Development Fund*.

Perform the following configuration in Siebel Tools to make the market development fund that the brand owner creates visible to partners using the Partner Portal:

- Define the following user property in Employee Limit Pick Applet
  - Name: Override Visibility: Siebel Partner Manager
  - Value: Sub-Organization

For more information about Siebel Tools, see *Using Siebel Tools* .

Creating Market Development Funds

Market development funds (MDFs) are created for a variety of reasons. For example, an alliance partner might agree to a fixed MDF as part of its alliance agreement, or you can do joint marketing with a partner and create an accrual MDF to which you contribute one percent of the partner's sales.

When you create a new MDF, you must specify which partners are participants in the fund and you must specify the fund type.

There are three types of MDFs:

- **Fixed Fund.** A fund that has a specific amount of money allocated to it.
- **Accrual Fund.** A fund that has money allocated to it based on the partner's performance. For example, partners can accrue funds based on the number of units sold of a specific product or product line, based on a percentage of their revenues, or based on other metrics you define.
- **Mixed Fund.** A fund that has both a fixed and an accrual element. It begins with a specific amount of money, and it also accrues additional money depending on partner performance.

When you create the Fund record, you must specify the type of fund. This determines where funds are added.

To create a new MDF, you perform the following tasks:

- *About Fund Design Lists*
- *Creating a New Fund Record*
- *Adding Partner Companies as Fund Participants*
- *Adding Funding to the Market Development Fund*

About Fund Design Lists

From the Fund Design screen a number of different fund design lists are available. The following table describes each list.

List	Description
My Fund Designs	This list displays all fund designs owned by the user.

List	Description
All Fund Designs	This list displays all fund designs of the partners in the same organization of the user.
All Fund Designs Across My Organizations	This list displays all fund designs of the partners in the same organization and sub-organizations of the user.
All Fund Designs Across Organizations	This list displays all the fund designs of the partners in all organizations.

Creating a New Fund Record

The first step in creating a new MDF is to add a new Fund record.

To create a new Fund record

1. Navigate to the Fund Design screen.
2. In the My Fund Designs list, add a new record to this list.
3. Enter information about the new fund in the new record and the More Info form, as shown in the table below.

Field	Description
Name	Enter a name for the fund (up to 50 characters) for your own use.
Type	Choose Fixed, Accrual, or Mixed to indicate how funding is allocated.
Fund ID	A unique identifier that is generated automatically.
Active	Indicates whether the fund is currently active, that is, whether partners can make fund requests against this fund. Generated automatically based on the start date and end date.
Locked	Lets you lock the fund record so no one can update it.
Period	Optionally, use the Pick Period dialog box to choose a predefined period from a picklist defined by the Siebel administrator, such as 2005 or Jan. 2005. If you select a period, the Start Date and End Date fields are filled automatically.
Start	The date when a partner can begin applying for money from this fund.
End	The last date when a partner can apply for money from this fund.
Target Amount	The amount of money targeted to be accrued to a fund. For a fixed fund, the amount of money agreed to in a fund.

Field	Description
Description	A text description of the fund for your own use. Enter up to 150 characters.
Total Credits	The total of all deposits into the fund. Read-only field calculated by the Siebel CRM system.
Total Debits	The total of all the approved withdrawals from the fund (actual amounts granted to partners). Read-only field calculated by the Siebel CRM system.
Fund Balance	The balance in the fund, calculated as Total Credits minus Total Debits. Read-only field calculated by the Siebel CRM system.
Fixed Credits	Credits from fixed deposits into the fund.
Accrual Credits	Credits from accruals to the fund.

Adding Partner Companies as Fund Participants

The second step in creating a new MDF is to add the partner companies that are fund participants to the fund. Partners must be added to the Fund Participation list because only fund participants (and employees at the brand owner company acting on their behalf) are authorized to spend against a fund.

Sometimes, partners contribute to MDFs for joint marketing activities with the brand owner. In these situations, the partner is usually the only participant in the fund.

Similarly, because accruals are used as incentive programs for partners, you generally have only one partner in each accrual fund. If you added multiple partners, one partner would accrue funds and the other partners could spend the funds accrued by the first partner.

If you add a partner company as a fund participant, there must be a partner manager defined for that partner company, so the partner's fund requests can be routed to the partner manager for approval. For more information, see *Registering the Partner Company*

To add a partner company to an MDF

1. Navigate to the Fund Design screen.
2. Select the appropriate fund design list and drill down on the name of the fund to which you want to add the partner company.
3. Navigate to the Fund Participation view.

   The Fund Participation view appears.
4. In the Fund Participation list, add a new record.

5. Enter information in the new record's fields about the partner company's participation, as shown in the following table.

Field	Description
Partner	In the Pick Channel Partner dialog box, choose the participating partner company.
Target Amount	Enter the target amount for this partner to receive from all its fund requests to this fund.
Period	Optionally, use the Pick Period dialog box to choose a predefined period, such as 2005 or Jan. 2005. When you do select a period, the Start Date and End Date fields are filled automatically.
Start	Enter the date when this partner can begin applying for money from this fund. The default value is the start date of the fund.
End	Enter the last date when this partner can apply for money from this fund. The default value is the end date of the fund.
Description	Optionally, enter a description (up to 150 characters) of this partner company's participation in this fund for your own use.

Adding Funding to the Market Development Fund

The third step in creating an MDF is to add funding to it. The type of funding you add depends on the choice you made in the Type field when you created the Fund record:

- **Fixed.** If the fund type is Fixed, add the funding amount in the Fixed Fund Administration view.
- **Accrual.** If the fund type is Accrual, add the funding amount in the Accrual Fund Administration view.
- **Mixed.** If the fund type is mixed, use both the Fixed Fund Administration view and the Accrual Fund Administration view to specify the amount of funding it has. The mixed fund contains the sum of the fixed and accrual funding that you specify.

Use the following procedure to add fixed funding to an MDF.

To add fixed funding to an MDF

1. Navigate to the Fund Design screen.
2. Select the appropriate fund design list and drill down on the name of a Fund that is Fixed or Mixed.
3. Navigate to the Fixed Fund Administration view.
4. In the Fixed Fund Administration list, add a new record.
5. Enter information about the fixed funding in the new record., as shown in the following table.

Field	Description
Name	A name for this funding for your own use, such as Initial Funding or Q2 Added Funding.

Field	Description
Amount	The amount of funding allocated to this fund for this transaction.
Period	Optionally, use the Pick Period dialog box to choose a predefined period, such as 2005 or Jan. 2005. When you do select a period, the Start Date and End Date fields are filled automatically.
Start	The date when partners can begin spending this funding. If this record is the initial allocation of money to this fund, then this date is the same as the start date for the fund. If this record is a supplementary allocation, it could be a different date. For example, if you have a yearly fund and you allocate extra funding for the third quarter, the start date for the extra funding could be the first day of the third quarter.
End	The last date when partners can spend this funding.

To add accrual funding to an MDF

1. Navigate to the Fund Design screen.
2. Select the appropriate fund design list and drill down on the name of a fund that is either an Accrual or a Mixed type.
3. Navigate to the Accrual Fund Administration view.
4. In the Partners list, select the partner company that accrues funding, or add a new record to add a new partner company to the list.
5. In the Accrual Definition list, add a new record.
6. Enter information about the accrual definition in the new record, as shown in the image below.

Field	Description
Type	Select the type of component on which the accrual is based. The default options are as follows: Orders (accrued funding based on all the orders of the partner) Product Line (accrued funding based on the orders of the partner for a specific product line) Product (accrued funding based on the orders of the partner for a specific product) Other options might have been added.
Product Line	If you choose Product Line in the Type field, in this field's dialog box, choose the product line on which accrued funding is based. If you do not choose Product Line as the type, this field is disabled.
Product	If you choose Product in the Type field, in this field's dialog box, choose the product on which accrued funding is based. If you do not choose Product as the type, this field is disabled.

Field	Description
Period	Optionally, use the list to choose a predefined period, such as 2005 or Jan. 2005. When you do select a period, the Start Date and End Date fields are filled automatically.
Start	The date when funding begins to accrue to this fund.
End	The last date when funding accrues to this fund.
Base	This field lets you tier funding by specifying the base amount at which the accrual begins. For example, if you want to give the partner accrual funding only after it sells $1,000,000, you can set the base at $1,000,000. Or, if you want to give the partner 1% of the first $1,000,000 it sells, and 2% of everything exceeding that, you can create one fund record with a base of $0 and a rate of 1% and a second fund record with a base of $1,000,000 and a rate of 1%. The second fund record would give an additional 1% beyond the 1% in the first fund record.
U/M	Select the unit of measurement on which the funding is based. For example, if you choose Pallet, Bag, or Dollar, the partner accrues the amount in the accrual rate field for each pallet, bag, or dollar of your product ordered. The units available here can be determined in the LOV administration view under UNIT_OF_MEASURE.
Accrual Rate	Enter an amount of funding that accrues for each unit sold.
Estimated Volume	Enter your goal, the volume of sales targeted for this accrual.
Actual Volume	Enter the actual volume of sales for this accrual.

Note: When you add an Accrual Definition record, the options available in the Type field can be defined in the List of Values view of the Applications Administration screen by adding values of type ACCRUAL_SRC_TYPE, and the options available in the U/M field can be defined by adding values of type UNIT_OF_MEASURE. For more information about list of value administration, see *Siebel Applications Administration Guide* .

Setting Up Fund Approval Authorization

This task is a step in *Process of Working with a Market Development Fund*.

Before your company can work with any MDFs, you must authorize the appropriate employees to approve fund requests.

Optionally, you can also change the Partner Manager field. The partner manager is the initial reviewer of the fund request, so specifying the Partner Manager field for a partner company determines how new fund requests from that company are routed.

Authorizing Employees to Approve Fund Requests

To authorize employees to approve fund requests, you specify the maximum amount of a fund request that each employee can approve.

Employees might get fund requests to review that are greater than the amount that they can approve. After reviewing those fund requests, they can route them to other employees in your company for approval.

For example, your channel manager for this company might be authorized to approve requests up to $10,000. If a partner submits a request for $5,000 and the channel manager approves it, then the approval process is finished. The request does not need any further approval.

However, if a partner submits a request for $50,000, it is still reviewed by the channel manager initially. The channel manager can either deny or route it to his or her manager for approval. Managers continue to have the option to deny the request or route it to their managers, until it reaches a manager who is authorized to approve the amount.

To route the request to the next employee in the approval process, select that employee's name in the Processed By field of the Fund Request record. The employee in this field is the only employee who can change the value of the record.

When you select an employee's name in the Processed By field, Siebel PRM automatically routes the Fund Request record to that employee, and it appears in that employee's My Funds Request view.

To authorize your employees to approve fund requests

1. Navigate to the Administration - User screen, then the Employees view.
2. Drill down on the name of the employee you want to authorize to approve fund requests.
3. In the More Info view, enter the amount for that employee in the Fund Approval Limit field.

Changing the Partner Manager Field

This task is a step in *Process of Working with a Market Development Fund*.

Optionally, you can change the Partner Manager field to change the routing of fund requests for approval.

The initial reviewer for a fund request logged by a partner is the employee selected in the Partner Manager field for that partner organization. This employee's name is automatically entered in the Processed By field of the fund request. This is the only use of the Partner Manager field, and you can change the initial reviewer of fund requests by selecting a different employee in this field.

To change the partner manager

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. In the Partner list, drill down on the name of the partner company for which you want to set the Partner Manager field.
3. In the More Info form, click the Single Select button for the Partner Manager field.

   The Pick Position dialog box appears.
4. Select the person you want as the partner manager, and click OK.

About Fund Request Lists

From the Fund Requests screen a number of different fund request lists are available. The following table describes each list.

List	Description
My Fund Requests	This list displays all fund requests owned by the user.
All Fund Requests	This list displays all fund requests of the partners in the same organization of the user.
All Fund Requests Across My Organizations	This list displays all fund requests of the partners in the same organization and sub-organizations of the user.
All Fund Requests Across Organizations	This list displays all the fund requests of the partners in all organizations.

Initiating a Fund Request

This task is a step in *Process of Working with a Market Development Fund*.

A fund request can be submitted either by a partner who enters it using the Siebel PRM Portal, or by an employee at your company who enters it using the Siebel PRM Manager. For example, it might be submitted by an employee in your company's marketing department who plans a marketing campaign involving MDFs.

Siebel Business Process Designer can be set up so that, when the request is initiated, the first employee who must approve it receives an email notifying that employee that the fund request has been submitted for approval. For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

To initiate a fund request

1. Navigate to the Fund Requests screen.
2. In the My Fund Requests list, add a new record.
3. Enter information in the fields of the new record and the More Info form, as shown in the table below.

Field	Description
Name	Enter a name for the request (up to 50 characters) for your own use.
Partner	In the Pick Channel Partner dialog box, choose the partner to which the request applies.
Fund	In the Pick Fund dialog box, choose the fund from which the money comes.
Tracking #	This field contains a unique number generated automatically, which you can use to track the request.

Field	Description
Campaign	Optionally, use the Pick Campaign dialog box to choose your company's marketing campaign for which this fund is being used.
Region	Optionally, choose a region (for example, Africa or North America) where the funding is spent.
Vertical	Optionally, choose an industry (for example, Automotive or Insurance) on which this funding is spent.
Category	Optionally, choose a category (for example, Advertising or Customer Event) on which this funding is spent.
Processed By	This field displays the name of the manager who is currently reviewing this request. When you enter a new request, the value in the field defaults to the Partner Manager for this partner organization, who is normally the first manager to review the request. To transmit the request to the next manager in the approval process, use the Pick Position dialog box to choose that manager's name. Only the employee whose name appears in this field can change the record (for example, to change the status to Approved or to Need More Information, or to route the record to the next person for approval).
Due	Enter the date when the funds are needed.
Status	In a new request, the status is New. During the approval process, the status of the fund request changes.
Owned By	This field holds the name of the person who initiated the fund request.
Amount Requested	Enter the amount of the request.
Amount Approved	During the approval process, approvers enter the approved amount in this field. They can approve the requested funding or a smaller amount. This field cannot be edited in a new request.
Actual Amount	This field displays the actual amount that has been debited to this fund request. This field cannot be edited in a new request.
Approval Log	Keeps track of the modifications to the fund request. Every time a user changes the status of the request or changes the amount approved, another record is added to the approval log.

Adding Attachments, Activities, and Activity Plans to MDF Requests

This task is a step in *Process of Working with a Market Development Fund*.

While you are working with a fund request, you might find it useful to add attachments, activities, or activity plans to the request.

Adding Attachments to Fund Requests

You can attach supporting documents to fund requests. For example, if you write a report that describes in detail how the partner plans to use the funding, you can attach it to the Fund Request record. Or, if the request is to fund a booth at a trade show, you can attach a brochure from the trade show using any convenient file format, such as Adobe Acrobat. Employees who review and approve the request can view these attached documents. Attach files to MDF Request records in the Fund Request Attachments view.

The partner to which an MDF request applies can view attachments to the request and can also add attachments to the request for the brand owner company to view.

To enter fund request attachments

1. Navigate to the Fund Requests screen.
2. Drill down on the name of the request to which you want to add the Attachment.
3. Navigate to the Fund Request Attachments view.
4. In the Fund Request Attachments list, add a new record.
5. In the Attachment Name field, select the file you want to attach to the record.

Adding Activities to Fund Requests

You can record a variety of activities that you perform as part of a Fund request, such as a meeting you must schedule with a partner to discuss the fund request. You can do this by attaching activities to the fund request.

To add an activity for a fund request

1. Navigate to the Fund Requests screen.
2. Drill down on the name of the request to which you want to add the activity.
3. Navigate to the Fund Request Activities view.
4. In the Fund Request Activities list, add a new record.
5. Fill in the fields with the details of the new activity.

Adding Activity Plans to Fund Requests

If you have a regular series of activities that you perform when you submit a type of fund request, such as a request for funding for a trade show, you can save time by using an activity plan. Activity plan templates define lists of activities that are often performed in sequence. If your company's Siebel Business Applications administrator has created appropriate templates, you can use a template to attach an activity plan to a fund request.

For information about creating activity plans, see the chapter on creating activity templates in *Siebel Applications Administration Guide* .

To enter an MDF request activity plan

1. Navigate to the Fund Requests screen.
2. Drill down on the name of the request to which you want to add the activity plan.
3. Navigate to the Fund Request Activity Plans view.
4. In the Fund Request Activity Plans list, add a new record.
5. In the Template field choose an existing template.

   The activities from that template are listed in the Activities list.

Viewing Fund Requests for a Partner Company

You can review a partner's performance periodically or view how many other fund requests from a partner are open before approving the current request. The Partner Fund view lets you look at a single list of the partner's fund requests, regardless of which MDF is involved.

To view a partner's fund requests

1. Navigate to the Partners screen, then the Partner List view.
2. Select the appropriate partner list and drill down on the name of the partner whose requests you want to display.
3. Navigate to the MDF Requests view.
   The MDF Requests list appears with that partner's fund requests from any MDF.

Viewing the Status of a Fund Request

You can use the Siebel PRM Manager check the status of a fund request after it has been submitted, and your partners can use the Siebel PRM Portal to view this information. For example, a partner who submitted a fund request can make sure that the approval process has started at the brand owner company. Employees who need to start work when the funding is available want to see if it is approved.

A fund request can have the status values shown in the following image.

To view the status of a fund request

1. Navigate to the Fund Requests screen.
2. Select the appropriate fund requests list and drill down on the name of the request whose status you want to check.
   The status appears in the Status field of the record.

Reviewing a Fund Request

This task is a step in *Process of Working with a Market Development Fund*.

After a fund request has been submitted, it must be routed in sequence to the employees who must review it. If the initial reviewer is authorized to approve the full amount in the request, only this approval is needed. However, if the request is larger than the initial reviewer can approve, the reviewer can either reject it or route it to another employee in the brand owner company for further review. If that employee is not authorized to review the entire amount, that employee can either reject it or route it to another reviewer.

To route the request for further review and approval, an approver selects Pending Approval in the Status field of the fund request and then selects that person's name in the Processed By field of the fund request. The fund request appears in the My Fund Requests view for that person. Only the reviewer whose name is in the Processed By field can modify the Fund Request record.

Rather than routing the request for further approval, approvers can also use the picklist in the Status field of the request to choose from among the following options:

- **Need More Information.** The approver needs more information to make the decision.

- **Rejected.** The approver rejects the fund request, and the request fails.
- **Approved.** The approver gives final approval to the fund request. This option is available only to an employee who is authorized to approve the full amount of the request.

When the status of a fund request is new, rejected, or need more information, all fields are editable.

When you change the status to another status, all fields become read-only, except for the Status, Comment, and Processed By fields.

After you change the status to approved, processed, fulfilled, or submitted for fulfillment, all fields become read-only, except for the Due Date, Amount Approved, and Actual Amount fields.

The possible values for the status of a fund request are shown in the table below.

Value	Description
New	The request has been submitted but has not yet been viewed by the initial approver.
Pending Approval	The request has been viewed by the initial approver.
Pending Approval 2	The request has been routed to a subsequent approver.
Pending Review	The request has been routed to the final approver. The final approver is called the reviewer.
Need More Information	One of the approvers has requested more information.
Rejected	The request has failed because an approver has rejected it.
Approved	The request has the required approvals.
Submitted for Fulfillment	The request has been submitted to the payments administrator for fulfillment.
Processed	The request has been processed by the payments administrator.
Fulfilled	The request has been fulfilled by the payments administrator. Funding has been sent to the partner.

Before you approve a fund request, you must look at the fund's checkbook to see the balance in that fund. Make sure the request is not larger than the remaining balance in the fund.

> **Note:** The balance in the checkbook is debited only after the Actual Amount field for a fund request is filled out. If you have approved a request and entered the approved amount, it is not necessarily reflected in the checkbook. It is visible only after you enter the actual amount.

To view the balance in an MDF

1. Navigate to the Fund Design screen.
2. Select the appropriate fund design list and drill down on the name of the fund whose balance you want to see.

3. For an accrual or mixed fund, navigate to the Accrual Fund Checkbook view.
   The Accrual Fund Checkbook view appears.
4. Click the Calculate Total button to update the total.
   The accrual balance in the fund appears in the Fund Balance field.
5. For a fixed or mixed fund, navigate to the Fixed Fund Checkbook view.
   The Fixed Fund Checkbook view appears.
6. Click Calculate Total to update the total.
   The fixed balance in the fund appears in the Balance field.

Use the following procedure to review a fund request.

To review a fund request

1. Navigate to the Fund Requests screen.
2. To reject the request, give final approval to the request, or ask for more information, choose a value in the Status field of the request you are reviewing.
   The Status field picklist gives you the option of approving the request only if its amount is less than the amount in the Fund Approval Limit field of your Employee record.
3. To route the request to another employee for further review and approval, do the following:
   a. Change the status to Pending Approval.
   b. Click the Single Select button next to the Processed By field to display the Pick Position dialog box.
   c. Select that employee's record, and click OK.

Viewing a Fund's Checkbook

This task is a step in *Process of Working with a Market Development Fund*.

You can use an MDF's Accrual Fund Checkbook view and Fixed Fund Checkbook view to display the balance remaining in the fund, as well as to display the details of how much of this balance comes from fixed funding, how much comes from accrued funding, and which funding requests have been debited against the fund.

The debits against the fund are shown in both the accrual fund checkbook and in the fixed fund checkbook.

> **Note:** The balance in the checkbook is debited only after the Actual Amount field for a fund request is filled out. If you have approved a request and entered the approved amount, it is not reflected in the checkbook. It is visible only after you enter the actual amount.

To view an MDF's checkbook

1. Navigate to the Fund Design screen.
2. Select the appropriate fund design list and drill down on the name of the fund whose balance you want to see.
3. If it is an accrual or mixed fund, navigate to the Accrual Fund Checkbook view.
4. Click Calculate Total to view the balance.
5. In the MDF Accrual Credits list, review the credits that have accrued to this fund. In the MDF Debits list, review the debits for this fund.
6. If it is a fixed or mixed fund, navigate to the Fixed Fund Checkbook view.

7. Click Calculate Total to view the balance.
8. In the Fixed Credits list, review the credits for this fund. In the MDF Debits list, review the debits for this fund.

The Advanced MDF Option

The advanced MDF option is described in the following topics:

- *Overview of Advanced MDF Option*
- *Key Features of MDF Management*
- *Scenario for MDF Management*
- *Process of Setting Up MDF Programs*
- *Creating an MDF Program and Program Account*
- *Setting Up a Program Account's First Snapshot*
- *Removing a Participant From an MDF Program*
- *Adding a Credit to a Program Account*
- *Creating a Preapproval*
- *Reviewing a Preapproval*
- *Creating a Claim*
- *Reviewing a Claim*
- *About MDF Debits*
- *HTIM MDF Period Ending Process Workflow*

Overview of Advanced MDF Option

In this MDF or co-op management process, the marketing manager sets up one or several programs and selects partners who can participate in the associated funds. This automatically creates program accounts for these partner participants so that partners can accrue funds or receive discretionary MDF amounts under the associated programs. Partners can request funding for marketing activities out of the funds accrued or received in their different program accounts. Partners request funding through the Siebel PRM Portal by creating a preapproval with one or more associated line items, identifying the different cost items associated with the marketing activity. These preapprovals are routed to the channel marketing manager, who can review and either accept or reject cost items at the line item level. Once approved, the partner can execute the corresponding marketing activity.

Partners can create claims through the Siebel PRM Portal to redeem the money in their program accounts for marketing activities against the preapprovals. When a claim is approved, the claim debits the program account. The claim amount can then be sent to the accounting system for payment processing. This process includes flexibility for routing and escalating approval requests to multiple people within brand owner organizations.

Key Features of MDF Management

MDF management includes the following features:

- **Program Management. P**rograms give the brand owner the ability to make marketing funds available to partners automatically. The brand owner can define a program with specific characteristics, such as activation

date, expiration date, eligible partners, target markets, target products, fund accrual rules and so on. After the participating partners are identified, the Siebel CRM system automatically generates all the program accounts for the participating partners. A pool of money made available to partners for the organization of marketing activities, for example, campaigns or events.

There are two programs types:

- **Co-Op Program.** A program under which the partner accrues credits based on performance. The co-op program is also known as an accrual fund. For example, resellers could accrue 2% of all product revenue into their account set up under this program.
- **MDF Program.** A program under which the partner receives discretionary funding from the brand owner. This is a nonperformance-based program. It is also known as a fixed fund. For example, after approval, this money could be spent on marketing activities for a specific product promotion.

- **Program Participant.** The account or organization participating in the program. For participating, the partner receives a program account for accrual of funds according to the program rules. This is temporary data used in selecting the partners that can be used for a program account.

  > **Note:** Participants can be selected only from accounts with the Fund Eligible check box selected. This check box appears in the Administration - Partner screen, Registered Partners view.

- **Program Account.** The individual account associated with the partner. Program accounts are child funds of the program. The partner accrues funds in a program account according to the program rules, or the channel account manager deposits discretionary amounts of money into the program account. Each partner can have multiple program accounts, one for each program in which the partner participates. Each partner can participate in the same program only once.
- **Credit.** This is a child of the program account used to represent the crediting of money to a particular program account. Credits are created manually.
- **Preapproval.** This is a request for funds. Partners request funding for marketing activities out of the funds accrued in their different program accounts. A preapproval can be associated with only one program account.
- **Claim.** This is a request for payment against a preapproval after a marketing activity has been executed. Claims go through an approval process at the brand owner's company. Claims are created against a specific preapproval. When the claim is approved, the claim debits the program account defined for the associated program account.
- **Debit.** Debits are read-only and created automatically only after a claim line item is approved.

Scenario for MDF Management

This scenario gives one example of how MDFs might be used. You might use MDFs differently, depending on your business model.

A program manager at the brand owner company is responsible for collaborative marketing with partners. She realizes that partners often have better insight into local markets and are therefore more suited to organize targeted marketing activities. Recently, her company's new product was introduced and in order to give resellers an incentive to resell this product, she has decided to set up a targeted program. This program lasts for six months, active immediately, and only specially certified dealers are eligible for participation. Under the program, resellers accrue 3% of their revenues for the server product line into their program account. All the funds accrued can then be used by the resellers to run marketing activities. However, her firm refunds only 50% of the total amount approved for every activity.

As part of the setup, the program manager selects the resellers eligible for participation and adds them to the program. By clicking the Generate button, individual program accounts are generated for each participating reseller.

The sales manager at one of the brand owner's resellers has noticed the new program set up by the brand owner. The sales manager decides to set up a local event to promote the new product to the existing client base. The plan is to invite the 20 most popular customers to a seminar to discuss the product. The sales manager creates and submits a preapproval to obtain approval from the brand owner to run the event.

After the event, the reseller collects invoices for the individual line items on his preapproval and submits a claim for payment. The reseller submits the claim, aware that the brand owner funds a maximum 50% of the total amount.

The channel account manager at the brand owner company reviews the claim. The manager sees that all conditions for payment are met. The manager sets the status of the claim to Accepted. However, because the channel account manager can only approve claims up to $1000, the claim status is not automatically set to Final Approved. Instead, the claim gets routed to his manager for review, who approves it.

Process of Setting Up MDF Programs

To set up MDF programs, perform the following tasks:

1. *Creating MDF Snapshot Periods*
2. *Making Partners Eligible for MDF Participation*
3. *Enabling the HTIM MDF Period Ending Process Workflow*
4. *Setting Up MDF Approval Authority Limits*

Creating MDF Snapshot Periods

Program account snapshots give an overview of all transactions for a given program account by period. They contain the amount of available and used funds in an MDF during each period. To use snapshots successfully, periods must first be set up in the Administration - Data screen, Periods view. For more information about creating periods, see the chapter that discusses ongoing applications administration tasks in *Siebel Applications Administration Guide* .

Before creating MDF programs, you must create at least six snapshot periods of type HTIM MDF Snapshot to cover the current month and the five following months.

To create snapshot periods

1. Navigate to the Administration - Data screen, then the Periods view.
2. In the Period Definition list, create a new record.
3. Enter a name for the period in the Period field.
4. From the Type list, select HTIM MDF Snapshot Month.
5. Complete any other necessary fields. For more information about these fields, see *Siebel Applications Administration Guide* .

   Repeat Step 2 to Step 5 for each subsequent period until you have created at least six HTIM MDF Snapshot Month periods. Each period you create must begin at the end of the preceding period.

   Note: You can edit snapshots in the Monthly Snapshot (Admin) view in the MDF Program Accounts screen.

Making Partners Eligible for MDF Participation

Prior to creating an MDF program, you must make sure that each partner you want to include in an MDF program is eligible for funds.

To make partners eligible for MDF programs

1. Navigate to the Administration - Partner screen, then the Registered Partners view.
2. Drill down on the record of the partner you want to include in a MDF program and then navigate to the More Info view.
3. Locate the Fund Eligible field.
   - If the Fund Eligible field is checked, this partner is already eligible for funds and can participate in an MDF program and no action is required.
   - If the Fund Eligible field is not checked, select the check box. The partner is now eligible to participate in an MDF program.

Enabling the HTIM MDF Period Ending Process Workflow

The HTIM MDF Period Ending Process workflow must be run as a server task (workflow manager task). It can be either a manual task or a repeated task running at the end of the period.

For more information about the HTIM MDF Period Ending Process workflow, see *HTIM MDF Period Ending Process Workflow* For information about how to activate workflows in Siebel Tools, see *Siebel Business Process Framework: Workflow Guide* .

Setting Up MDF Approval Authority Limits

You need to set up an approval authority limit in the Administration - User screen for each employee responsible for approving MDF programs.

To set up approval authority limits

1. Navigate to the Administration - User screen, then the Employees view.
2. Drill down on the employee for whom you want to set up approval authority limits.
3. Navigate to the More Info view.
4. In the Approval Authority section, in the Fund Approval Limit field, enter an approval amount.

Creating an MDF Program and Program Account

The program manager creates an MDF program and adds partners to it. A program account is then created automatically so the partner can take advantage of the MDF.

To create an MDF program and a program account

1. Navigate to the MDF Program screen, then the Programs view.
2. Create a new record and complete the necessary fields in the record and the More Info form. Some fields are described in the following table.

Field	Description
Aging Period (Month)	Number of days until new credits expire.
Start Date	Date preapprovals can start to be created against the program.

Field	Description
End Date	Date after which partners can no longer create preapprovals against the program. After this date, partners can still claim fund accruals in their Program Accounts (until the claim receipt deadline).
Amount	Total dollar amount committed to the program. Required if MDF is selected from the Type field.
Type	MDF or Co-op program.
Market	Market segment.
Program GL Code	General ledger account under which the program is created.
Participation Rate %	Indicates the percentage of activities organized under this program that the brand owner is willing to fund. This value transfers down to the preapprovals and claim line items.
Available Balance	Total Balance = [Total Credit] - [Total Debit] These values are rolled up from the credit and debit records through the snapshot, to the program account, and then to the program.
Credit	Rolled up from program account.
Debit	Rolled up from program account.

Note: Click the Rollup Snapshot button to refresh the sum of all the credits and debits for all MDF Program Accounts associated with the selected MDF program.

3. Navigate to the Program Participant view, and add a record.
4. In the Pick Account dialog box, select the partners you want to include in this program and click OK.
5. In the Program Accounts subview, click Generate.

   Program accounts are created automatically for each partner.

Setting Up a Program Account's First Snapshot

Before you can add credits to a program account, you must set up snapshot periods for the program account.

To set up a program account's first snapshot

1. Navigate to the MDF Program Accounts screen.
2. Locate and drill down on the program account for which you want to set up snapshots.
3. Navigate to the Monthly Snapshot (Admin) view and add a new record.
4. Click the Period select button.
5. In the Pick Period dialog box, query for Period Type of HTIM MDF Snapshot Month.
6. Select the period with the Start Date that is less than or equal to today's date, and the End Date less than or equal to today's date and then click OK.

Removing a Participant From an MDF Program

You might need to remove a participant from an MDF program.

To remove a participant from an MDF program

1. Navigate to the MDF Program screen.
2. Drill down on the program from which you want to remove a participant.
3. In the Program Participants list, select the participant you want to remove.
4. From the menu, select Delete Record.
5. In the warning dialog box, click OK to confirm deletion of this record.
6. Navigate to the MDF Program Accounts screen.
7. In the Program Accounts list, select the program account belonging to the participant you are removing.
8. In the program account form, from the menu, select Delete Record.
9. In the warning dialog box, click OK to confirm deletion of this record.

   The participant no longer has access to this MDF program.

Adding a Credit to a Program Account

Credits make funds available to resellers. You must create credits manually for each program account. In addition, the batch imports of the MDF credits can be performed using Siebel Enterprise Integration Manager. For information on batch imports, see *Siebel Enterprise Integration Manager Administration Guide* .

There are three types of credits:

- **Accrual**. Allows partners to accrue credit in their accounts.
- **Adjustment**. Allows program managers to apply an adjustment to an existing MDF accrual credit.
- **Reinstatement**. Allows program managers to extend MDF credit that was forfeited.

Note: Co-op program credits are incentive-based while MDF program credits are discretionary.

Use the following procedure to create an Accrual credit.

To create an Accrual credit

1. Navigate to the MDF Program Account screen, then the Program Account view.

2. Drill down on the program account record for the partner to whom you want to provide a credit.
3. Navigate to the Checkbook (RW) view and add a new record.
4. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Type	Indicates the nature of the credit.
Sub Type	Further indicates the nature of the credit. This field is optional and does not affect how the MDF credit is processed.
Market	Market segments relevant to this partner.
Amount	Amount of the credit.
Period Posted	Period during which this credit is posted. Note that the MDF credit is set to the current period regardless of what information is entered in the Period Posted field.
Expiration Date	Date on which this credit is no longer available for the partner's use.

Repeat for each partner or program account for which you want to provide a credit.

Use the following procedure to create an Adjustment credit.

To create an Adjustment credit

1. Navigate to the MDF Program Account screen, then the Program Account view.
2. Drill down on the program account record for the partner to whom you want to make an adjustment.
3. Navigate to the Checkbook (RW) view and add a new record.
4. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Type	Indicates the nature of the credit.
Sub Type	Further indicates the nature of the credit. The available values are Correction or Reallocation. This field is optional and does not affect how the MDF credit is processed.
Market	Indicates the market segments that are relevant to this partner.
Amount	Amount of the adjustment. Both negative and positive amounts are accepted.

Field	Description
Period Posted	Period during which this credit is posted. If the adjustment is a correction to an MDF credit, set the Period Posted date to the same date as the Period Posted date of the original MDF credit. If the adjustment is a reallocation, set the Period Posted date according to your business needs.
Expiration Date	Date on which this credit is no longer available for the partner's use. If the adjustment is a correction to an MDF credit, set the Expiration Date to the same date as the Expiration Date of the original MDF credit. If the adjustment is a reallocation, set the Expiration Date according to your business needs.

5. Repeat for each partner or program account for which you want to make an adjustment.

Use the following procedure to create a Reinstatement credit.

To create a Reinstatement credit

1. Navigate to the MDF Program Account screen, then the Program Account view.
2. Drill down on the program account record for the partner to whom you want to reinstate credit.
3. Navigate to the Checkbook (RW) view and add a new record.
4. Complete the necessary fields. Some fields are described in the following table.

Field	Description
Type	Indicates the nature of the credit.
Sub Type	Further indicates the nature of the credit. This field is optional and does not affect how the MDF credit is processed.
Market	Indicates the market segments that are relevant to this partner.
Amount	Amount of the reinstatement credit.
Period Posted	Period during which this credit is posted.
Expiration Date	Date on which this credit is no longer available for the partner's use.

5. Repeat for each partner or program account for which you want to make a reinstatement.

Overview of How Credits Affect the Monthly Snapshot

Adding a credit to a program account results in real-time changes to the current Monthly Snapshot. Some fields are described in the following table.

Field	Description
30	If the expiration date of the MDF credit is within the current period, the 30 field is increased by the new credit value.
60	If the expiration date of the MDF credit is within the second period, the 60 field is increased by the new credit value.
90	If the expiration date of the MDF credit is within the third period, the 90 field is increased by the new credit value.
90+	If the expiration date of the MDF credit is past 90 days, the 90+ field is increased by the new credit value.

Note: For adjustments, the values are either increased or decreased.

Creating a Preapproval

Using the Siebel PRM Portal, the reseller creates a preapproval so that it can request funds offered by the MDF.

The reseller creates a preapproval with several associated line items. Line items allow the partner to identify specific items required for the marketing activity and their estimated cost.

To create a preapproval

1. In the Siebel PRM Portal, navigate to the MDF Pre-Approvals screen, then the My Pre-Approvals view.
2. Add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Pre-Approval #	Automatically generated number for the preapproval.
Pre-Approval Name	Description of the preapproval.
Status	Approval status of the preapproval.
Program Name	Name of the program to which the program account associated with this preapproval belongs.
Program Account	Program account against which the preapproval was created.
Assigned To	Name of person responsible for reviewing and approving this preapproval.

Field	Description
Partner	Name of the partner account that is submitting the preapproval request.
Submitted By	Name of person who submitted this preapproval.
Total Amount Proposed	Sum total of the values in each Amount Proposed field in the line items.
Total Participation Amount	This value is equal to the participation rate multiplied by the amount proposed as part of the preapproval request. The participation rate value comes from the MDF program.
Total Amount Approved	Calculated field. The amount is rolled up from the preapproval line items.

3. Drill down on the Preapproval record and navigate to the Line Items view.
4. Add a new record for each component of this preapproval and complete the necessary fields. Some fields are described in the following table.

Field	Description
Category	Indicates the kind of item this is. Values include Advertisement, Seminar, Conference, Trade Show, and Collateral.
Market	Market segments relevant to this partner.
Vendor Name	Name of the vendor supplying the good or service indicated in the line item.
Start Date	Date the specified marketing activity starts.
End Date	Date the specified marketing activity ends.
Participation Rate	This value is inherited from the MDF Program Participation Rate.
Participation Amount	Calculated field indicating the maximum amount the brand owner contributes. The value comes from the participation rate multiplied by the proposed amount.
Amount Approved	Calculated field indicating how much the brand owner approves for a given line item. This defaults to the participation amount multiplied by the approved percentage.

Field	Description
Category	Indicates the kind of item this is. Values include Advertisement, Seminar, Conference, Trade Show, and Collateral.
Market	Market segments relevant to this partner.
Vendor Name	Name of the vendor supplying the good or service indicated in the line item.
Start Date	Date the specified marketing activity starts.
End Date	Date the specified marketing activity ends.
Participation Rate	This value is inherited from the MDF Program Participation Rate.
Participation Amount	Calculated field indicating the maximum amount the brand owner contributes. The value comes from the participation rate multiplied by the proposed amount.
Amount Approved	Calculated field indicating how much the brand owner approves for a given line item. This defaults to the participation amount multiplied by the approved percentage.

5. Navigate to the Activity or Activity Plans view to associate activities with this preapproval.
6. In the Status field of the preapproval form, select Submitted to submit the preapproval, and then save your changes.

Reviewing a Preapproval

After a preapproval has been submitted, the channel account manager reviews it. He or she can change amounts, reject line items, and approve as appropriate.

To review a preapproval

1. Navigate to the MDF Pre-Approval screen, then the All Pre-Approvals view.
2. Drill down on the preapproval you want to review.
3. Navigate to the Line Items view to review each line item.
4. In the Status field of each line item, select one of the following:
   a. If you approve the line item, select Accepted As Is.
   b. If you approve the line item but have made changes to it, select Accepted With Changes.
   c. If you do not approve the line item, select Denied.
   d. If you want the partner to make changes, select Returned.
5. In the preapproval form, the value in the Status field must be Submitted and can then be changed to one of the following:

- Accepted
- Rejected
- Pending
- Returned
- On Hold

Creating a Claim

After the partner has completed the activity for which it submitted the preapproval, the partner can create a claim and submit it to obtain the funds.

One preapproval can have several claims associated with it, but a claim can be associated only with one preapproval.

To create a claim

1. In the Siebel PRM Portal, navigate to the MDF Claim screen.
2. Add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Status	Status of the claim. Values vary depending on where the claim is in the review process.
Pre-Approval #	Indicates the preapproval against which this claim is being made. All claims originate from a preapproval.
Claim Name	Name of the claim.
Program Name	Name of the program from which this claim originates.
Has Enough Funds	If this check box is selected, it indicates that the internal available balance field is greater than or equal to the total amount approved field.
Total Amount Claimed	Total sum of money requested by the reseller.
Total Amount Approved	Total sum of approved line items.
Total Participation Amount	This value is equal to the participation rate multiplied by the amount proposed. The participation rate value comes from the MDF program.

3. Save the claim, drill down on it, and enter more information in the More Info form as needed. Some fields are described in the following table.

Field	Description
Claim Category	Choose from a variety of types of events to describe what this claim is for.
Pre-Approval Category	Type of preapproval event. This value comes from the preapproval record.
Promotion Name	Provide the name used to promote your event.

4. Navigate to the Line Items view, add a new record for each completed activity or task outlined in the preapproval, and complete the necessary fields.

Field	Description
Amount Claimed	Indicates how money much is being requested for this line item.
Name	Enter a name for this line item.

5. In the claim form, in the Status field, select Submitted to submit the claim.
6. Save your changes.

Reviewing a Claim

After the reseller submits a claim, the channel manager reviews it and decides whether it is approved.

To review a claim

1. Navigate to the MDF Claim screen.
2. In the Claims list, drill down on the claim you want to review.
3. Navigate to the Line Items view and review each of the claim's line items.
4. For each line item, enter values in the Amount Approved and Final Amount Approved fields.

> **Note:** Amount Approved could be different from Final Amount Approved if the final approver has to make changes. Final Amount Approved is the field used for back-office processing.

5. In the Status field of each line item, select one of the following:
   - If you approve the line item, select Accepted As Is.
   - If you approve the line item but have made changes to it, select Accepted With Changes.
   - If you do not approve the line item, select Denied.
   - If you want the partner to make changes, select Returned.

6. In the claim form, change the value from In Progress to one of the following:
    - If you approve the claim, select Accepted.
    - After you change the Status field to Accepted, the claim is processed. If there are sufficient funds and the employee has a sufficient approval limit, then the claim status is automatically set to Final Approval and the appropriate debits are created.

      > **Note:** The status of an accepted claim is not sent to Final Approval if the claim amount is higher than the approval limit of the channel manager. In this situation, the Reserved field in the current Monthly Snapshot is increased by the claim amount. The Reserved field is decreased by the claim amount when the claim is approved or rejected by a manager with the appropriate approval limit.

    - If you do not approve the claim, select Denied.
    - The claim cannot be edited any further.
    - If you want to make changes to the claim before approving, select Returned.
    - The reseller can change the status to Pending and continue to work on the claim.

About MDF Debits

Debits are read-only and created automatically only after a claim line item is approved. There are two types of MDF debits:

- **Paid.** This type of debit is created after an MDF claim is approved by the channel manager and the status is set to Final Approval by the Siebel Business Application.
- **Forfeiture.** Any unused credit for the current period is forfeited when the HTIM MDF Period Ending Process workflow is executed at the end of the current period. In this situation, a Forfeiture debit is created with the value of the unused credit.

Debit creation results in real-time changes to the Monthly Snapshot. The following table describes the changes that occur when a Paid debit is created.

Field	Description
Paid	The value is increased by the debit amount.
Ending Balance	The value is decreased by the debit amount.
Available Balance	The value is decreased by the debit amount.
30	If the available credit in this field is more than the MDF debit, the value is decreased by the debit amount. If the balance is zero (0) or less than the MDF debit amount, the balance remains 0 or is decreased to 0.
60	If the available credit in this field is more than the remaining debit amount after debiting available credit from the 30 field, this field is decreased by the remaining MDF debit. If the available credit is less than the remaining debit amount, the balance remains 0 or is decreased to 0.

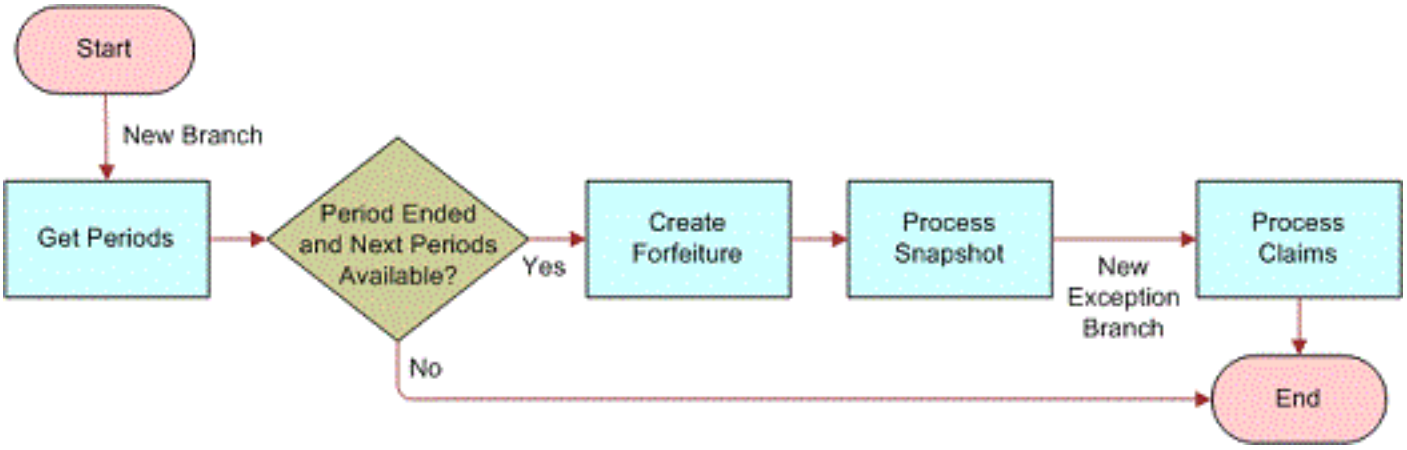
Field	Description
90	If the available credit in this field is more than the remaining debit amount after debiting the available credit from the 30 and 60 fields, this field is decreased by the remaining MDF debit. If the available credit is less than the remaining debit amount, the balance remains 0 or is decreased to 0.
90+	If the entire MDF debit was not used against the available credit balance in the 30, 60 or 90 fields, this field is decreased by the remaining debit amount.

The following table describes the changes that occur in the Monthly Snapshot when a Forfeiture is created.

Field	Description
Forfeited	The value is increased by the debit amount.
30	The value is decreased to 0.
Ending Balance	The value is decreased by the debit amount.
Available Balance	The value is decreased by the debit amount.

HTIM MDF Period Ending Process Workflow

On the last day of the current period, the MDF program account Monthly Snapshot for the current period is closed and a new Monthly Snapshot for the next period is created. This process is executed by running the HTIM MDF Period Ending Process workflow, which is illustrated in the following diagram. For information about enabling this workflow, see *Process of Setting Up MDF Programs*.



As shown in this diagram, the steps in this workflow are as follows:

1. Query for the next period with an end date that is less than or equal to the current date and where the type is HTIM MDF Snapshot Month.
2. Check if today is the end of the current period and if there are subsequent periods available:
    - If the period has not ended or there is no subsequent period available, the workflow ends.
    - If the period has ended and a subsequent period is available, the workflow creates a new Monthly Snapshot for each active MDF program account. Some fields in the new Monthly Snapshot are described in the following table.

Field	Description
Beginning Balance	Same value as the Ending Balance of the previous Monthly Snapshot.
Accrued	Total of all MDF accrual credits for the current new period. The value is always 0 when the new Monthly Snapshot is created.
Adjusted	Total of all MDF adjustment credits for the current new period. The value is always 0 when the new Monthly Snapshot is created.
Reinstated	Total of all MDF reinstatement credits for the current new period. The value is always 0 when the new Monthly Snapshot is created.
Paid	Total amount of all MDF debits paid for the current new period. The value is always 0 when the new Monthly Snapshot is created.
Reserved	Same value as the Reserved field in the previous Monthly Snapshot.
30	Same value as the 60 field in the previous Monthly Snapshot.
60	Same value as the 90 field in the previous Monthly Snapshot.
90	Value is TC90-TP90 where: TC90 is the Total Credits expiring within 60 to 90 days of this new period. TP90 is the Total Paid amounts equal or less than the total credits expiring within 60 to 90 days of this period.
90+	Value is TC90Plus-TP90Plus where: TC90Plus is the Total Credits expiring within 90+ days of this period.

Field	Description
	TP90Plus is the Total Paid amounts equal or less than the total credits expiring within 90-plus (+) days of this period.
Available Balance	Total of 30, 60, 90 and 90+ field values.

18 Managing Your Partners

Managing Your Partners

The other chapters of this book focus on how to share information with your partner. This chapter focuses on tools you would use to track information about your partners, to train your partners, and to communicate with your partners.

As part of your relationship with partners, you can use Siebel PRM to train partner employees, certify partner companies, plan partner management activities, measure partners' performance, and keep other records about your partners. It includes the following topics:

- *About Tracking Partner Information*
- *Process of Certifying Your Partners*
- *About Communicating with Your Partners*

About Tracking Partner Information

You can track partner information in the following ways:

- *Using the Partner and Partnership Profile*
- *Entering Partner Management Activities*
- *Entering Partner Agreements*
- *Adding Partner Company Attachments*
- *Entering Partner Contacts*
- *Entering Partnership Contacts*
- *Adding Notes About a Partner Company*
- *Creating a Partner Company Organization Chart*
- *Uploading Partner Logos*

Using the Partner and Partnership Profile

Siebel PRM lets you work with two profiles:

- **Partner Profile.** A partner profile includes information about the partner or prospective partner company's business.
- **Partnership Profile.** A partnership profile includes information about your company's relationship with the partner company.

The Partner Profile

You can use the Partner Profile screen to enter information about the partner company for your own use, such as its annual revenues, its number of employees, its sales revenues, and so on.

If this company applied to be a partner through your Siebel PRM Portal, it filled out a partner profile form. You can use the Partner Profile screen to view the information that it entered.

To enter or view a partner company profile

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner whose profile you want to display.
3. Navigate to the Profile view.
4. If the Partner Profile is not already displayed, navigate to Partner Profile view.
5. Enter or view the information in the following table about the partner company in the Partner Profile form.

Field	Description
Description of Business	A short description of the partner company's business and background.
Annual Revenue	The partner company's annual revenues.
Markets	The market segments in which the partner operates.
# of Employees	The number of employees at the partner company.
# of Sales Employees	The number of employees in the partner company's sales organization.
# of Service Employees	The number of employees in the partner company's service organization.
Growth Strategies	The partner's growth strategy.
Routes to Market	The partner's routes to market.
Expertise	A list of the partner company's special skills.
Other Program Membership	Other companies with which the partner has a relationship. (This partner is a member of these companies' partnership programs.)
Partner's Competitors	A list of the partner company's competitors.

6. In the Products list, enter the partner's products and services that are relevant to your company. Add new records to the list, and enter the information in the following table in their fields.

Field	Description
Name	The name of the partner's product or service.

Field	Description
Version	The version of the partner's product or service.
Description	A description of the partner's product or service.
Service Product	Select this flag if the product is a service.
Sales Product	Select this flag if the product is a sales-related product.
Part #	Enter the part number associated with the product or service.
Type	Enter the type of product.

7. In the Related Products list, add the brand owner company's products that are related to the partner's products that you entered. Add new records to the list, and enter the information in the following table in their fields.

Field	Description
Product	The name of the brand owner's product or service.
Relation	Indicates the relationship of the brand owner's product to the partner's product. Examples are Component, Bundled, and Cross-Promoted.
Integration Status	Indicates the status of integration between the brand owner's product and the partner's product. Examples are Integration In Progress and Integration Completed.
Description	A description of the product.
Vendor	Vendor name of the product.
Effective Start Date	The start date of the validated relationship between the brand owner's product and the partner's product.
Effective End Date	The end date of the validated relationship between the brand owner's product and the partner's product.
Orderable	Indicates whether the product is orderable.

Field	Description

To work with a partner company profile

- Modify a record by selecting a field and changing the information.

Entering the Partnership Profile

The Partnership Profile screen holds information about your relationship with the partner company and the way you work together, and so it supplements the partner profile, which holds information about the partner company itself.

When you are first planning how you can work together with a partner company, the Partnership Profile screen lets you clarify your future relationship by discussing the items on this screen with people at the partner company.

To enter or view a partnership profile

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner whose partnership profile you want to display.
3. Navigate to the Profile view.
4. Navigate to Partnership Profile view, if the partnership profile is not already displayed.
5. Enter or view information in the following table about this partnership in the Partnership Profile form.

Field	Description
Description of Partnership	Enter a general description of the partnership.
Channel Sales Growth Rate	Enter the annual growth rate of the partner's sales of your products.
Yearly Channel Sales	Enter the partner's yearly sales of your products.
Quarterly Channel Sales	Enter the partner's quarterly sales of your products.
Start Date	Enter the date when the partnership was initiated.
End Date	If the partnership is terminated, enter the termination date.
Renewal Date	Enter the date when the partnership is to be renewed.
Fees Paid	Select this flag to indicate that the partner has paid membership fees.
Internal Benefit	Enter the benefit of this partnership to your company.

Field	Description
Partners Benefit	Enter the benefit of this partnership to the partner company.
Satisfaction Index (1 - 10)	The channel manager can use this field to rate this partnership on a scale of 1 to 10.
Joint Markets	Select the market segments in which you and this partner jointly operate.
Joint Routes to Market	Enter a description of your company's and the partner's joint routes to market.
Joint Growth Strategy	Enter a description of your growth strategy for this partnership.

6. In the Product Line list, enter your product lines that are relevant to this partnership, such as lines of products that you expect the partner to resell. Add new records to the list, and enter the information in the following table in their fields.

Field	Description
Product Line	Choose a product line from a list of your company's product lines.
Description	A description of the product line is entered automatically.
Products	A list of products in this product line is entered automatically.
Product Line Manager	The name of the product line manager is entered automatically.

Entering Partner Management Activities

You often want to record activities that you perform to manage your partners, such as a telephone call you must make or a meeting you scheduled. You can list these activities on the Partners screen, Activities view. For more information about activities, see *Siebel Applications Administration Guide* .

Activities you add in the Partners screen are generally for your own use. However, you can also assign them to your own employees or to partner employees by selecting an employee's name in the Assigned To field.

To enter a partner management activity

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner to which the activity applies.
3. Navigate to the Activities view.

4. In the Activities list, add a new record.
5. Fill in the fields with the details of the new activity.

Use the following procedure to work with partner management activities.

To work with partner management activities

- Modify a record by editing the information in its fields.
- Delete a record by selecting it, clicking the menu button, and then clicking Delete Record.
- To display a list of your activities, including your partner management activities, navigate to the Activities screen.

Entering Partner Management Activity Plans

Siebel business Applications make it possible to create activity plans, which are templates that include lists of activities that are often performed in sequence. Using activity plan templates makes it easier to create complicated series of activities. If your company's Siebel Business Applications administrator has created these templates, you can use them through the Partner Activity Plans view.

For example, you might often organize marketing events together with your partners. Organizing a marketing event requires a sequence of activities that are fairly standardized. You can create an event organization activity plan that includes these standard activities.

When you want to organize an event, use this activity plan, and assign each activity in it to the person who is responsible for it. For more information about activity plan templates, see *Siebel Applications Administration Guide* .

Generally, the activity plans that you add in the Partners screen are for your use. However, you can also assign these activities to your own employees or to partner employees by selecting an employee's name in the Activity record's Assigned To field.

To enter a partner management activity plan

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner to which the activity plan applies.
3. Navigate to the Activity Plans view.

   The Activity Plans list appears.
4. In the Activity Plans list, add a new record.
5. Fill in the fields with the details of the new activity. Use the Template field list to choose an existing template.

   The activities from that template are listed in the Activities list.

Use the following procedure to work with partner management activity plans.

To work with partner management activity plans

- Delete a record by selecting it, clicking the menu button, and then clicking Delete.
- To display a list of your activities, including activities from your partner management activity plans, navigate to the Activities screen.

Entering Partner Agreements

It is often useful to have a list of the agreements that you have made with a partner company to refer to when you want to look up a specific agreement. Use the Partner Agreements view to record the agreements that you have made with your partners. For more information on agreements, see the chapter on agreements in *Siebel Applications Administration Guide* .

Note: The partner agreements that appear in the Partners screen are not to be confused with service agreements with your customers. Partner agreements are agreements between the brand owner and partner company.

To enter partner agreements

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner with which you have made the agreement.
3. Navigate to the Agreements view.
4. In the Agreements list, click the menu button, add a new record Record to add a new record to this list, and then enter the details of the agreement.

Use the following procedure to work with partner agreements.

To work with partner agreements

- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it, clicking the menu button, and then clicking Delete.

Adding Partner Company Attachments

When you attach documents to a partner company's record, you can access them when you are working with that partner company. For example, if you write a report about a partner company, you can attach it to that company's record. Use the Partner Attachments view to attach files to partner records.

The attachments you add in the Partners screen are for your company's use. Your partners cannot access them. To share files with a partner, you must add attachments to Account, Contact, or Market Development Fund records, which the partner can access.

To enter partner company attachments

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner to which you want to add the attachment.
3. Navigate to the Attachments view.
4. In the Attachments list, add a new record.

   The Attachments Form appears.
5. In the Attachments Name field, click the Multiple Select button.

   The Add Attachment File dialog box appears.

6. Browse to locate the file you want to attach to the partner company record and click Open.

   The name of the file is entered in the File Name field of the new Add Attachment dialog box.
7. Add a record.

   The name of the file appears in the Attachment Name field.
8. Fill out the other fields in the Attachments record.

Use the following procedure to work with partner attachments.

To work with partner attachments

- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it, clicking the menu button, and then clicking Delete.
- Display the contents of the attached file by clicking its name in the Name field.

Entering Partner Contacts

The Contacts list keeps track of your business contacts at the partner company.

Partner employees must be in the Contacts list to be included in partner organization charts. You can also add contacts when you are creating an organization chart; these new contacts are added to the Contacts list. For more information on contacts, see *Siebel Applications Administration Guide* .

> **Note:** Adding a contact in the Partner Contacts view does not give that contact access to the Siebel PRM Portal. If you want partner contacts to have access to Siebel PRM, you must also add them in the User Assignments list of the Administration - Partner screen, or they must be added by the delegated administrator at their own company. For more information, see *Working with Partner Programs*.

To enter partner company contacts

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner company where the contact is an employee.
3. Navigate to the Contacts view.
4. In the Partner Contacts list, add a new record.
5. Enter information about the contact.

Entering Partnership Contacts

The Partnership Contacts list keeps track of the key people who manage this partnership. It includes the following:

- **Key partner contacts.** These employees of the partner company are responsible for managing the partner relationship.
- **Internal owners.** These employees of the brand owner company are responsible for managing the partner relationship.

For more information on contacts, see *Siebel Applications Administration Guide* .

Note: Partner employees must be in the partner Contacts list, described in the previous topic, for you to be able to select them to be added to the Partnership Contacts list.

To enter partnership contacts

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner company where the contact is an employee.
3. Navigate to the Partnership Contacts view.

   The Key Partner Contacts list appears.
4. In the Key Partner Contacts list, add a new record.

   The Key Partner Contacts form appears.
5. Click the Single Select button for the Last Name field.

   The Pick Contact dialog box appears, listing employees already added to the partner Contacts list.
6. Select the record for the contact you want to add, and click OK.

   The fields in the Key Partner Contacts form are filled out with information about this contact.
7. In the Internal Owners list, add a new record.
8. In the Add Positions dialog box, select the person in your company who is the internal owner of this partnership contact. You can select more than one internal owner.

Adding Notes About a Partner Company

Partner notes let you enter text information about partner companies. For example, if a partner gives you driving direction to its office, you can enter the information in a note added to that company's record.

This information can be exclusively for your use or can be shared with colleagues in your company:

- **Private Notes.** These notes are visible only to the person who entered them.
- **Shared Notes.** These notes are visible to anyone in the brand owner company who can see the partner's records.

You and others in your company can use the Partner Notes view to enter notes about your partners.

Note: Partner employees do not have access to shared notes. They are used for sharing information within the brand owner company.

To enter notes about a partner company

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner to which the note applies.
3. Navigate to the Notes view.
4. If the proper type of note is not already displayed, navigate to Private Notes or Public Notes view.
5. In the Notes list, add a new record.
6. Enter the note as text in the Description field of the new record.

Use the following procedure to work with notes about a partner company.

To work with notes about a partner company

- Modify a record by selecting a field and changing the information.
- Delete a record by selecting it, clicking the menu button, and then clicking Delete.

Creating a Partner Company Organization Chart

When you display a company organization chart of a large partner company, you can see every employee's position at a glance. Siebel PRM lets you define the hierarchy shown in the organization chart by specifying the manager for every contact. Select the appropriate person in the Manager field of the Contact record.

Everyone in the organization chart must be on your contact list for that partner company. You can add new contacts in the Partner Organization Analysis view while you are working on the organization chart, and they are also visible in the Partner Contacts view.

The lower form in the Partners Organization Analysis view has a list next to its name. Use this list to toggle between a Contacts view, which has a list of your partner contacts, and an Organization Analysis view, which has an organization chart. If the chart appears when you first open it, you must use this list to display the Contacts list in order to select each contact's manager. You can also use the Contacts list to add new contacts.

To create a partner company organization chart

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner company whose organization chart you want to create.
3. Navigate to the Organization Analysis view.

   The Partner Organization Analysis view appears.
4. If the lower form is Contacts list, go on to Step 6. If the lower form is Organization Analysis, select Contacts from the list.
5. Select the partner employee whose manager you want to specify.
6. Click the Single Select button for the Manager Last Name field.

   The Pick Manager dialog box appears.
7. Select the person's manager and click Pick.
8. Repeat Step 6 and Step 7 to select a manager for each of the partner contacts.
9. Select Organization Analysis from the list to display an organization chart for the partner company.

Use the following procedure to work with partner company organization charts.

To work with partner company organization charts

- Maintain the chart whenever the company's structure changes by using the Pick Manager dialog box to change Manager Last Name fields as needed.
- View the chart at any time by selecting the record of the partner company in the Partner screen and navigating to the Organization Analysis view.

Uploading Partner Logos

The Siebel PRM Portal allows a partner to upload its company logo. You can use the partner logo for collaborative presentations or proposals that you want to co-brand.

The partner can upload multiple logos, because you might need its logo in different formats to use in different media. For example, you use .gif or .jpg format to display on the Web, and you might need a higher quality format for printed material.

The partner uploads logos by clicking on the Profile link, displaying the Company profile, and then displaying the Logos list. The partner can add a record to this list and select the graphics file for the logo.

After these logos are approved by the brand owner, the partner can specify which logo is displayed in the Partner Locator by selecting it in the Partner Profile Logo field of the Company Profile form. The brand owner can also specify which logo is displayed in the Partner Locator by selecting it in the Partner Profile Logo field in the Partner screen of the Siebel PRM Manager. Both partner and brand owner can access this field, and can use it to select a logo of the type jpg, bmp, gif, or another Web format to be displayed.

You must approve logos that the partner has uploaded before they can be used. When a partner submits a logo, its status defaults to submitted. You approve it by changing the status to approved. The partner can view the status in the Siebel PRM Portal but cannot change it.

You use the Siebel PRM Manager to approve, access and use all the partner's logos.

To approve or access a partner logo

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, select the partner company whose logos you want to work with.
3. Navigate to the Logos view.
4. To approve a logo, in the Status field of its record in the Logos list, select Approved.
5. To access a logo, in the Logos list, click the file name.
6. When you drill down on the file name, the Logo Details view appears, where you can see the logo.

Process of Certifying Your Partners

You can set up partner certification programs to give your partners an opportunity to improve their skills and let your customers know which partners are most skilled.

For example, you might enroll new partner companies as silver partners. When a partner company's employees have taken ten training courses, answered 20 customer service requests, and generated $20 million in revenue, you might make the company a Gold partner. Or, when employees have taken 20 training courses, answered 40 customer service requests, and generated $50 million in revenue, you might make the company a Platinum partner.

A partner company can work on several certification programs at the same time. For example, a partner might work on becoming a certified reseller and a certified service provider.

To certify partners, perform the following tasks:

1. *Creating Certification Metrics*. Plan and create appropriate metrics for all of your certification programs.

2. *Creating Certification Templates*. Set up certification templates that specify the requirements for each level of certification in a certification program.
3. *Associating Certifications with a Partner Company*. Associate the appropriate certification template with each partner company.
4. *Recording Partners' Progress*. You can enter the courses partners have taken, or you can set up Siebel Business Process Designer to enter these values automatically. For example, when a partner uses the Siebel PRM Portal to take a training course, Siebel Business Process Designer can increment the value in the Actual# field for that partner's training courses.
5. *Checking a Partner's Progress*. Display a list of the certifications a partner company is working on, and check the progress on each certification.

You can also check information about partner certifications in the following ways:

- *Displaying Certified Partners*
- *Displaying Certifications Across Partners*

You can make partner certification easier with the following configuration: *Configuring Autopopulation of Partner Certification Criteria*.

Creating Certification Metrics

This task is a step in *Process of Certifying Your Partners*.

Before you can create any certification templates, you must create certification metrics.

A certification metric lets you find partners who are taking similar certification programs. For example, if you plan to develop a series of certification programs that require partners to take training courses, you could create a metric named # of courses taken. Then, when you evaluate partner performance, you can search on the metric field to list the certification programs that require training courses, and compare the performance of partners working on these programs.

A certification metric also lets you define the criteria for a particular certification. For example, you could define multiple criteria for a partner company to become a Certified Reseller. One of those criteria could be to generate $20 million in revenue. You would define this criterion by choosing a predefined metric named Sales Revenue and assigning a target amount value of $20 million.

A certification metric is not a mathematical formula that measures performance. Performance is measured using the Target and Actual fields of each certification definition. A metric lets you categorize criteria, so you can compare the performance of different partner companies measured using similar criteria.

To add a new certification metric

1. Navigate to the Administration - Application screen, then the List of Values view.
2. In the List of Values list, add a new record.
3. Click the Single Select button.
4. The Pick Value Type dialog box appears.
5. Choose CHAMP_METRIC_CD, and click OK.
6. In the Order field, enter the order in which this metric appears on the list of values in the list for the Metric field of Certification Criteria records.
7. In the Display Value field, enter the name for the metric to appear in the list for the Metric field of Certification Criteria records.
8. Click Language Name, and select the language for this record.
9. Other fields are optional and are not generally used in certification criteria. Fill them out only if you have a special reason to do so.

This metric is added to the Metrics picklist in Certification Criteria records.

Creating Certification Templates

This task is a step in *Process of Certifying Your Partners*.

A certification template includes general information about a certification program, such as its name and description, and a list of the criteria required for that certification.

For example, you could create a template for companies that want to become Gold partners with two criteria: that a partner company's employees must take ten training courses and answer twenty customer service requests.

There are three fields that define criteria for certification:

- **Target #.** Enter the target number here when you create the certification template, and enter the actual number in the Actual # field as the certification program is being completed. For example, if you require a partner to resell one hundred of your computers to become a Gold partner, the measurement is the number of computers that a partner sells, so you would enter 100 in the Target # field.
- **Target Amount.** Enter the target amount here when you create the certification template and enter the actual amount in the Actual Amount field as the certification program is being completed. For example, if you require a partner to resell $100,000 of your computers to become a gold partner, the measurement is the amount of revenue for a partner's sales, so you would enter 100,000 in the Target Amount field.
- **Condition Clause.** If the criterion has a condition, enter a brief description of the condition that the partner company must satisfy when you create the certification template and select True or False in the Condition Met field as the certification program is being completed. For example, if the condition is to have the partner go to a trade show to display your computers, you would select True when the partner goes to the show.

In addition, if you are using the Target # or Target Amount field, you can optionally specify what the target refers to in the Training Course or Product field.

For example, in one certification definition, you might enter 100 as the target number and select Laptop computers as the product, showing that 100 refers to this product. In a second definition, you might enter 100 as the target number and select Printers as the product, showing that 100 refers to this product. Then, the partner would have to resell one hundred laptop computers and one hundred printers to receive this level of certification.

To create a certification template

1. Navigate to the Partner Certifications screen, then the Certification Templates List view.
2. In the Certification Templates list, add a new record.
3. Enter information in the following table about the certification template in the new record.

Field	Description
Template Name	Enter the name of the certification template.
Validity (months)	Enter the number of months that a certification, once gained, is valid.
Created	Displays the date when this certification record was created.

Field	Description
Created By	Displays the employee who created this template record.
Updated	Displays the date when this certification record was last updated.
Updated By	Displays the employee who last updated the certification template.
Active	Leave this field unchecked while you are working on the template. When the template is done, check the field to make the template active, so your partners can see it.
Description	A description of this certification for your own use.

4. Drill down on the name of the new record.
5. Navigate to the Certification Criteria view.
6. In the Certification Criteria list, add a new record.
7. Enter the criteria from the following table in the new record's fields.

Field	Description
Condition Clause	If you are using a condition as the target, enter it here.
Metric	Select a metric, which you use to categorize and define your certification criteria.
Target #	If you are using a quantity as the target, enter the target number here.
Target Amount	If you are using an amount as the target, enter the target amount here.
Training Course	Optionally, choose the training course that must be completed as part of the criteria.
Product	Optionally, choose the product that the partner must have sold or been trained on, as a part of the criteria.

Associating Certifications with a Partner Company

This task is a step in *Process of Certifying Your Partners*.

You can create a certification record for each of your partners and associate these records with certification templates.

You can also set up Siebel Business Process Designer to automatically enter the value Certified in the Status field of the Certification record when values are filled in the Certification Criteria list that satisfy all the requirements of the certification, making the partner company a certified partner. For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

To create a certification record and associate it with a partner

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner company for which you want to create a certification.
3. Navigate to the Certifications view.
4. In the Certifications list, add a new record.
5. Enter information from the following table in the fields.

Field	Description
Template Name	Click the Single Select button and select a predefined template. The criteria in the Certification Criteria form are automatically filled based on the template chosen.
Certification Name	Enter a name for the certification.
Description	Enter a description of the certification.
Partner	Enter the name of the partner company.
Active	This field is automatically set to true if the End Date is greater than today.
Status	Indicates the status of the certification: In Progress, Not Started, Certified.
Certified Date	The date on which the status is set to Certified is entered automatically when you select this status.
End Date	The end date is entered automatically, set based on the certified date and the validity (in months) defined for the certification template.

Recording Partners' Progress

This task is a step in *Process of Certifying Your Partners*.

Partner employees can view certification programs in the Certification view of the Siebel PRM Portal. This view has Actual#, Actual Amount, and Condition Met fields in addition to the Target#, Target Amount, and Condition clause fields whose values you entered when you created the template. Your partners can view these fields to see a certification program's requirements.

You can configure Siebel Business Process Designer to fill out these fields automatically, based on actions that partner employees take when they register for training courses, or work with Opportunity records, or work with Service Request records, and so on. For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide* .

Checking a Partner's Progress

This task is a step in *Process of Certifying Your Partners*.

At any time, you can look up each certification a partner company is working on and how much progress has been made on each one.

To look up a partner company's certifications

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner company whose certifications you want to check.
3. Navigate to the Certifications view.

   Certification view appears.
4. Select any certification record in the Certifications list.

   The criteria for that certification are displayed in the Certification Criteria list.

   In the Certification Criteria list, compare the Target#, Target Amount, or Condition Clause field for each record with the Actual#, Actual Amount, or Condition Met field for each record.

Displaying Certified Partners

You can display the partner companies that have achieved each of your certification levels in the Partner Certification screen.

To display certified partners

1. Navigate to the Partner Certifications screen, then the Certification Templates List view.
2. In the Certification Templates list, drill down on the name of a certification template.
3. Navigate to the Certified Partners view.

   The Certified Partners list includes the partners with that certification.

Displaying Certifications Across Partners

You can display the certifications all of your partners have completed or are working on in the Partner Certifications screen. The list includes the status of each certification.

To view certifications across partners

- Navigate to the Partner Certifications screen, then the Partner Certifications List screen, then the All Certifications Across Partners view.

  The partner certifications appear.

Configuring Autopopulation of Partner Certification Criteria

When the user adds a Certification child record to a Partner record in the Partner Certification - Certifications Detail view of the Partners screen, the criteria associated with the template selected are automatically populated in the Certification Criteria list.

This autopopulation depends on the following user properties in the Partner Certification business component:

- Child Attribute BC
- Template Definition BC

Autopopulation also requires that the following business components are configured in the Channel Partner business object using the appropriate links:

- Partner Certification
- Partner Certification Criteria
- Partner Certification Template
- Partner Certification Template Definition

The user properties and the business components must be consistent.

About Communicating with Your Partners

Siebel PRM allows you to use partner satisfaction surveys to measure how satisfied your partners are with their working relationship with your company. For more information, see *Administering Partner Satisfaction Surveys*.

Administering Partner Satisfaction Surveys

Partner satisfaction surveys allow you to measure how satisfied your partners are with their working relationship with your company.

Partners employees can go to the Partner Satisfaction screen of the Siebel PRM Portal, click a link to display the survey, answer a series of multiple-choice questions, enter free-form comments, and submit the survey.

Viewing the Results of Partner Satisfaction Surveys

The brand owner can use the Partners screen to display the results of these surveys. These results help them develop plans to improve their working relations with their partners.

To view the results of partner satisfaction surveys

1. Navigate to the Partner screen, then Partner List view.
2. In the Partners list, drill down on the name of the partner company whose training courses you want to see.
3. Navigate to the Survey view.

   A list of all surveys submitted by employees of that partner company appears, with fields that represent overall satisfaction and the questions in each survey.
4. Select a record in the Survey list and scroll down to see the Partner Satisfaction Survey form, which includes the full questions and answers for the survey, and the Satisfaction Level form, which lets you view several charts of the overall satisfaction level for the survey.

Configuring Partner Satisfaction Surveys

You can use the partner satisfaction surveys that are provided with Siebel PRM, or you can change these surveys by configuring them using Siebel Tools.

For more information about using Siebel Tools, see *Using Siebel Tools* .

19 Reporting on Partner Performance

Reporting on Partner Performance

This chapter describes the ways that you can use Siebel PRM to produce reports about partner companies, and to analyze partner performance. It includes the following topics:

- *About Partner Performance and Reporting*
- *Using CHAMP Planning and Partner Performance Reports*
- *Using Assessments to Evaluate Partner Performance*
- *Using Siebel PRM Reports*
- *Oracle Business Intelligence Enterprise Edition Partner Reports*

About Partner Performance and Reporting

Siebel PRM gives you a number of ways to analyze partner performance, including the following:

- **CHAMP Planning and Partner Performance Reports.** CHAMP planning lets you create initiatives and joint business plans with your partners. Because these plans have clearly defined objectives and action plans, you can create and use CHAMP metrics to measure the success of each partner company in achieving its objectives. You can also use the Partner Performance view of the Partners screen to see reports about a partner's performance. For more information, see *Using CHAMP Planning and Partner Performance Reports*.
- **Assessments.** Assessments let you evaluate partner performance based on criteria that you specify in assessment templates. They let you define any criteria that meet your needs. For more information, see *Using Assessments to Evaluate Partner Performance*.
- **Siebel PRM Reports.** Siebel PRM includes many built-in reports that let you integrate information and performance results from different tools. These prebuilt reports include Smart Reports, which incorporate recommended practices from sales and call center applications, and Parameterized Reports, which let the user customize the report at runtime. For more information, see *Using Siebel PRM Reports*.
- **Partner Analysis.** Partner Analysis uses Oracle Business Intelligence Enterprise Edition and the Siebel Data Warehouse. Partner Analysis includes nearly 200 prebuilt, partner-specific reports to help brand owners assess individual partner performance and the success of the partnership program as a whole. In addition, Siebel PRM includes hundreds of prebuilt reports for sales analysis, service analysis, marketing analysis, and executive analysis within your organization. The reports focus on key performance indicators across a large number of predefined metrics. Oracle Business Intelligence Enterprise Edition also lets users design new reports. For more information, see *Oracle Business Intelligence Enterprise Edition Partner Reports*.

You can use one or more of these methods of reporting or evaluating partner performance, depending on your business needs.

Using CHAMP Planning and Partner Performance Reports

Channel and Alliance Management Process (CHAMP) is an established process that allows brand owners to work collaboratively with partner organizations and evaluate the partner's performance. CHAMP planning involves creating partnership initiatives and partner plans with clearly defined objectives and action plans, so you can measure the success of each partner company in achieving these objectives.

After you execute the plan, you measure partner performance against the established objectives. For more information about CHAMP planning and reporting, see *CHAMP Planning*.

Performance reports measure partner performance as you do in CHAMP planning, without going through the entire process of setting up CHAMP initiatives and action plans. You have to enter objectives and metrics only.

These reports are read-only. In order to create objectives for a partner and measure them, you have to first create a dummy CHAMP Plan for this partner in the CHAMP Planning screen and add objectives to this plan. At the end of the objective time period, you enter the actual values. The Partner Performance Reports display the objectives that you created for this partner. You can filter these objectives based on the Plan, Plan Period, and the Metric fields.

The advantage of using these performance reports is that you do not have to create comprehensive CHAMP plans with highlights and action plans, and you do not have to work closely with the partner to jointly approve the plans. This approach would make sense when you have hundreds or thousands of second- or third-tier partners and you want to track their performance, but you do not want to engage in detailed planning sessions with each partner.

The Partner Performance view is driven by CHAMP objectives. It uses the objectives' metrics, target number and actual number, target amount and actual amount, condition clause and condition met in the same ways as CHAMP objectives.

Each partner performance report measures the success of one or more objectives, which work like CHAMP objectives. The report is based on the target number or target amount that you entered when you created the objective. For example, if the objective is to sell computers, the target number might be 1000 computers sold in the quarter, or the target amount might be $2 million in sales for the quarter.

At the end of the performance report period, you can manually enter the actual number or actual amount for the objective (for example, if 1124 computers were sold, or if $2,231,426 of computers were sold). However, it is best to create workflow rules or business services to calculate the actual values automatically based on transactional data such as opportunities, service requests, orders, and so on.

The sample database includes an example of such a workflow. Its name is eChannel CHAMP Update Metrics workflow. The name of the corresponding business service is eChannel CHAMP Services.

To create performance reports

- **Create a sample CHAMP plan.** In this situation, the user is creating this plan just to serve as a placeholder for the performance objectives. The plan must be created because performance objectives cannot exist without being associated with a plan. For more information on creating a CHAMP plan, see *CHAMP Planning*.
- **Create performance objectives.** Use the Plan Objectives view to create performance objectives. For more information on creating performance objectives, see *CHAMP Planning*.
- **View the partner's performance.** Use the Partner Performance view of the Partners screen to see reports on the performance of the partner company.

Use the following procedure to view partner performance.

To view partner performance

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner whose performance you want to evaluate.
3. Navigate to the Partner Performance view.
4. Click Performance Over Time.
5. Use the lists to choose the time periods for which you want to display a chart and the type of chart you want to display.

   Charts are displayed showing the partner's performance during the time period as measured by an amount metric or by a quantity metric.
6. Click Performance On A Metric.
7. Choose the metric, the partner, the plan, and the plan period that you want to measure performance on.
8. Choose the chart you want to display.

   Charts are displayed showing the partner's performance against this metric for an amount metric or for a quantity metric.

Using Assessments to Evaluate Partner Performance

Assessments give you a quick way to evaluate the performance of partner companies based on the criteria that you specify. First, your Siebel business Applications administrator must create one or more assessment templates that specify the factors to use to evaluate the partner. You can then attach a template to the partner's record and see how well the partner scores.

You can use assessments to evaluate accounts, opportunities, and contacts based on the criteria in the assessment template. You can define any criteria that meet your needs.

For information about creating assessment templates, see the topics on setting up assessment templates in *Siebel Applications Administration Guide* .

To enter a partner company assessment

1. Navigate to the Partners screen, then the Partner List view.
2. In the Partners list, drill down on the name of the partner that you want to assess.
3. Navigate to the Assessments view.
4. In the Assessments list, add a new record.
5. Fill in the fields with the details of the assessment. In the Template field, choose an existing assessment template.

   The factors that are evaluated by that template and the score for each factor are listed in the Assessment Attributes list.
6. In the Assessment Attributes list, enter the actual values for the assessment attributes.
7. To see how well the partner did overall, view the values in the Score, Percent, and Max Possible Score fields of the Assessments record.

Use the following procedures to work with partner assessments.

To work with partner assessments

- Modify a record by selecting a field and changing the information.
- Delete a record by clicking the menu button and then clicking Delete Record.

Using Siebel PRM Reports

Siebel PRM lets your employees and partner employees run and distribute reports in batch or interactive mode. Users can schedule reports so they run periodically at a specified time, or can run long reports at off-peak times.

Siebel Business Applications' prebuilt reports include Smart Reports, which incorporate recommended practices from sales and call center applications, and Parameterized Reports, which let the user customize the report at runtime.

To optimize performance, report output is generated in DHTML format and sent to the browser one page at a time.

There are a wide variety of reports available that Siebel PRM shares with other Siebel Business Applications. The following reports are specific to Siebel PRM:

- **Partner Profile.** This report gives the full partner profile for the current or selected partner record. It is available in the Siebel PRM Manager's partner list views (My Partners, My Team's Partners, and so on).
- **Partner Report Card.** This is a full report of how the partner has met its CHAMP objectives, including lists of objectives for each plan in which the partner participates and charts of the partner's targets and actuals. It is available in the Siebel PRM Manager's partner list views (My Partners, My Team's Partners, and so on), CHAMP Plan view.
- **Marketing Funds Detail.** This is a report that lists the funds and gives details on each fund, including the fund type, the current balance, totals for debits and credits, and a list of transactions. It is available in the Siebel PRM Manager's Fund Design view.
- **Fund Request Summary.** This report lists market development funds and summarizes the fund requests for each one, including request details such as amount requested, amount approved, approver, and status. It is available in the Siebel Partner Manager's Fund Request view and the Siebel PRM Portal's Fund Request view.

Use the following procedure to produce a report.

To produce a report

1. Navigate to one of the screens where that report is available.
2. If necessary, perform a query to filter the data.
3. Click the Reports button.
4. In the Reports list, select the report that you want to run and click Run.

Oracle Business Intelligence Enterprise Edition Partner Reports

The Siebel PRM Manager and Siebel PRM Portal use Oracle Business Intelligence Enterprise Edition to provide a variety of different types of reports.

For more information about Oracle Business Intelligence Applications Fusion Edition, formerly known as Siebel Business Analytics Applications, see the relevant documentation for the version of the software that you are running:

- For versions earlier than 7.9, see Oracle's Siebel Business Analytics Applications documentation.
- For versions 7.9 or later, see the Oracle Business Intelligence Applications Fusion Edition documentation.

For more information about the analytics platform on which your analytics application runs, see the relevant documentation for the version of the platform that you are running:

- For versions earlier than 10.1.3.2, see Oracle's Siebel Business Analytics Platform documentation.
- For versions 10.1.3.2 or later, see the Oracle Business Intelligence Enterprise Edition documentation.

Siebel Partner Analysis

Siebel Partner Analysis includes predefined reports that you can use to gain insight into your company's and partners' performance. It also includes the ability to create ad hoc reports so you can produce the reports you need.

Oracle Business Intelligence Enterprise Edition's predefined reports cover most business reporting needs.

The following is a scenario showing how a marketing manager, channel manager, or other executive at the brand owner company might use Siebel Partner Analytics to analyze partner performance:

- The channel manager at a brand owner company wants to evaluate performance of partner organizations, in order to find out the following:
    - Which partners are bringing in the most revenue
    - Which types of partners are bringing in the most revenue
    - Which partner tiers have the highest margins and the greatest sales volume
    - Which products and product lines partners are selling
    - Which partners are closing deals most quickly
    - Which partners are responding to service requests quickly
    - Which partners are creating the most quotes
    - Which partners are engaging in the most (or fewest) activities for each deal
    - Which partner territories have the greatest number of opportunities
    - Which partners have the greatest expected revenue this quarter
- In the Siebel PRM Manager, the brand owner's channel manager navigates to the Partner Analytics screen to view available prebuilt reports. The brand owner navigates to on the view for the report category to display a list of reports in that category, and then navigates to on a report link to bring up that report with charts.
- The brand owner can analyze information further by using filters based on business objects. For example, if all partners are displayed in the report initially, the brand owner can analyze information by partner type (such as reseller, consulting partner, VAR), tier (such as Platinum, Gold, Silver), and territory. The brand owner also can analyze information by account, product, month, quarter, and year.
- If there is not a prebuilt report that displays the information the brand owner wants, the brand owner can navigate to the Ad Hoc Analysis view to create a new report. This view allows you to select and move tools used to develop the new report.

Viewing Available Oracle Business Intelligence Enterprise Edition Reports

In addition to Partner Analytics, the Siebel PRM Manager has several screens with Oracle Business Intelligence Enterprise Edition reports for a variety of purposes. Visibility to these analytics screens and views depends a user's responsibility, so all users might not see all screens.

Use the following procedure to view available Oracle Business Intelligence Enterprise Edition reports.

To view available Oracle Business Intelligence Enterprise Edition reports

1. Navigate to one of the following screens or views:
    - Executive Analytics
    - Marketing Analytics
    - Partner Analytics
    - Sales Analytics
    - Service Analytics
    - Partner Analytics screen, Commerce Analytics view
    - Partner Analytics screen, Segmentation Analytics view
    - Partner Analytics screen, Partner Marketing Analytics view
2. Select the categories of the reports you want to view.

Siebel Portal Analytics

Oracle's Siebel PRM Portal provides Oracle Business Intelligence Enterprise Edition reports for your partners which they can use to analyze their performance in sales, service, marketing, commerce, and training.

The PRM Portal Analytics incorporates visibility rules to make sure that one partner does not have access to another partner's reports.

The PRM Portal Analytics screens and views visible to the user depends on the user's responsibility, so all users might not see all of these views.

To view available Oracle Business Intelligence Enterprise Edition reports

1. The partner navigates to the Analytics screen, then the Partner Analytics view and to one of the following views:
    - Executive Analytics
    - Sales Analytics
    - Service Analytics
    - Marketing Analytics
    - Commerce Analytics
    - Training Analytics

2. The partner selects a report category.

20 Siebel Cross-Industry PRM

Siebel Cross-Industry PRM

This chapter describes the features of Siebel Cross-Industry PRM that are different from the features of Siebel PRM. It includes the following topics:

- *About Siebel Cross-Industry PRM*
- *Differences of Siebel Cross-Industry PRM from Siebel PRM*

About Siebel Cross-Industry PRM

Siebel Cross-Industry PRM allows you to work with partners as efficiently as you work with employees of your own company.

- To set up Siebel PRM, you, as a brand owner, go through the process of enrolling partner companies. The brand owner can add these companies' employees or can assign this task to a delegated administrator at each company.
- Then, the brand owner can share business information with partner employees as you do with your own employees.
  - The brand owner's employees work with this information using Siebel Partner Manager, which lets them manage this information in the same way they do using their Siebel Business Application.
  - Partner employees view and work with this information using Siebel Partner Portal.
- The brand owner can also use Siebel Partner Manager to:
  - Send information about special promotions and Web messages to partners.
  - Work collaboratively with partners to develop plans to meet strategic goals.
  - Analyze partner effectiveness, forecast revenue, and analyze performance.

Differences of Siebel Cross-Industry PRM from Siebel PRM

This document covers only features of Siebel Cross-Industry PRM that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM in this book.

The most important differences are:

- **Account Hierarchy.** The account hierarchy allows you to create multiple billing accounts and service accounts for a single customer. This feature gives greater flexibility in providing service and sending invoices and statements to multiple account sites.

- **Multiple Accounts and Contacts with One Address.** In Siebel PRM, the user must enter a new address for each new account and contact (even if it is the same as an existing account or contact address). In Siebel PRM for SIA, the user can choose an existing address for a new account or contact; there is one pool of unique addresses, and the user can choose one of these for a new account or contact.

For information about accounts and subaccounts and about associating accounts with contacts, see *Siebel Life Sciences Guide* .

For information about configuring, administering, and using Siebel PRM, see the documentation for Siebel PRM in this book.

Several chapters of this book describe possible scenarios that illustrate ways the brand owner and partner company might use Siebel PRM, including *Managing Sales with Siebel PRM*,*Managing Service Requests with Siebel PRM*, *Managing Marketing Campaigns with Siebel PRM*, and *Managing Partner Commerce*. The scenarios are meant to illustrate many possible uses of Siebel PRM. Many of these scenarios might not apply in your industry.

21 Siebel Public Sector Provider Portal

Siebel Public Sector Provider Portal

This chapter describes the features used to manage public sector service providers that are different from the features of Siebel Partner Relationship Management (PRM). It includes the following topics:

- *About Managing Public Sector Service Providers*
- *Differences Between Siebel Public Sector and Siebel PRM*
- *Scenario for Using Siebel Public Sector to Work with Service Providers*
- *Tasks for Setting Up Siebel Public Sector to Work with Service Providers*
- *Process of Setting Up New Service Providers*
- *Process of Referring Benefits Cases to Service Providers*
- *Agency Tasks*
- *Service Provider Tasks*
- *Workflow Reference for Siebel Public Sector Provider Portal*

About Managing Public Sector Service Providers

Public agencies can use Siebel Public Sector and Siebel Public Sector Provider Portal to refer benefits cases to third-party service providers and to share information about these benefits cases with these service providers. For example, public agencies can use these applications to assign children in need of foster homes to service providers who provide foster homes.

Overview of Setup and Use

To use the product

1. The public agency sets up Siebel Public Sector and sets up service providers.
2. The public agency shares business information with service providers through the Web:
    - The agency's employees work with this information using Siebel Public Sector.
    - Service provider employees view and work with this information using Siebel Public Sector Provider Portal, which they access through the Web.

Types of Information That Agencies and Service Providers Share

The important types of information that agencies and service providers share include:

- **Products.** A *product* is a type of service that the service provider provides. For example, if the service provider is a foster home, its product might be Foster Care Standard Bed. When the agency sets up Siebel Public Sector to work with service providers, it defines the products that it wants from third-party service providers.
- **Contracted Products.** The agency negotiates with the service provider to purchase products at a specific price. When the agency and the service provider have agreed a price for a product, it is called a *contracted product.* For example, if the agency contracts with a foster home to provide a Foster Care Standard Bed for $100 for each week, the bed is a contracted product.
- **Assets.** The service provider is able to provide a specific number of any product, and each individual instance of the product is called an *asset.* For example, if a foster home provides the product, Foster Care Standard Bed, and it has a total of four beds, each of those four beds is an asset. The service provider maintains an inventory showing how many of these four beds are already taken and how many are available at any time.
- **Referral Orders.** When an agency refers a client to a service provider, it creates a *referral order*, which is a formal request from the agency to use one of the service provider's assets for a specific period. For example, if an agency refers a child to the foster home for one year, it creates a referral order for one Foster Care Standard Bed for one year.

Differences Between Siebel Public Sector and Siebel PRM

This chapter covers only the features of Siebel Public Sector used for managing service providers that are different from the features of Siebel PRM.

Differences that apply to the entire book are:

- **Terminology.** The chapters about Siebel PRM in this book use the terms *brand owner*, *partner*, and *customer*. In Siebel Public Sector, these terms have the following meanings:
  - Brand owner refers to the *public agency*.
  - Partner refers to the *service provider.*
  - Customer refers to the *contact* or *citizen* who receives social services.
- **Cross-references.** This book often refers to *Siebel Applications Administration Guide* for more information. For Siebel Public Sector, in addition to this book, see *Siebel Public Sector Guide* .

Differences in Managing Service Providers and in the Siebel Public Sector Provider Portal

About Siebel PRM describes the PRM-specific screens of the Siebel Partner Manager and the screens of the Siebel Partner Portal used by Siebel PRM. There are a number of differences in the Siebel Public Sector screens used for managing service providers and in Siebel Public Sector Provider Portal.

Siebel Public Sector Screens for Managing Service Providers

In addition to the screens of Siebel PRM, Siebel Public Sector has the following new or modified screens and views used for managing service providers:

- **Service Providers screen.** The Service Providers screen is similar to the Partners screen in Siebel PRM. Many of the views in this screen are used in the same way as the equivalent view of the Partners screen in Siebel PRM, so their use is not described in detail in this chapter. Some views are new or modified for Siebel Public Sector, and they are described in this chapter. The similar and modified views are:
  - **Providers Home.** Similar to the Partners Home view in Siebel PRM.
  - **Service Provider List.** Similar to the Partners List view in Siebel PRM, but with the following major changes:
    - The Sales Team field is renamed the Team field, and it is used in the same way to determine who has access to this Service Provider record.
    - The Price List field is used to choose the Price List for the providers services, as described in *Specifying Price Lists for Service Providers*.
  - **More Info.** Similar to the More Info view in Siebel PRM.
  - **Activities.** Similar to the Activities view in Siebel PRM.
  - **Activity Plans.** Similar to the Activity Plans view in Siebel PRM.
  - **Addresses.** Allows you to add multiple addresses for the service provider. For more information, see *Adding Addresses for Service Providers*.
  - **Agreements.** Lists all agreements with the service provider. For more information, see *Adding Agreements with Service Providers*.
  - **Assets.** Allows the agency to add the initial inventory of assets and to view the currently available assets at the service provider. For more information, see *Adding the Initial Inventory for Service Providers*.
  - **Attachment.** Similar to the Attachments view in Siebel PRM.
  - **Logos.** Similar to the Logos view in Siebel PRM.
  - **Notes.** Similar to the Notes view in Siebel PRM.
  - **Orders.** Lists all referral orders of a service provider. For more information, see *Viewing and Updating Referral Orders*.
  - **Profile.** Allows agencies to view and manage the service provider profile. For more information, see *Managing Service Provider Profiles*.
- **Other screens.** In addition to the views of the Service Providers screen, the following view of another screen is useful in dealing with service providers:
  - **Cases screen, Plans, Benefit Plans view.** Used to create referral orders to refer benefits cases to service providers. For more information, see *Creating Referral Orders for Benefits*.

Siebel Public Sector Provider Portal

Siebel Public Sector Provider Portal has the following new or modified screens:

- **Home screen.** Allows service providers to view referral orders that the agency has referred to them. For more information, see *Accepting or Rejecting Referrals (Service Provider)*.
- **Agreements screen.** Allows service providers to view agreements to provide products that the agency has with them. For more information, see *Viewing Agreements (Service Provider)*.

- **Assets screen.** Allows service providers to manage inventory. For more information, see *Managing Inventory for Accepted Referral Orders (Service Provider)* and *Managing Inventory (Service Provider)*.
- **Cases screen.** Allows the agency and service provider to share information about cases. For more information, see *Sharing Information About Cases with the Agency (Service Provider)*.
- Allows the agency to create referral orders for the benefits in a case. *Creating Referral Orders for Benefits*.
- **User Profile screen.** Includes a Service Profile view that allows the service provider to manage its service profile, indicating the accommodations it provides. For more information, see *Managing Service Provider Profiles (Service Provider)*.

Differences in Business Use Between Siebel PRM and Siebel Public Sector

Sharing Data with Partners discusses how to share transactional data and master data with your partners using Siebel PRM. Most of these methods of sharing data do not apply to the public sector.

Several chapters of this book describe possible scenarios that illustrate the ways the brand owner and partner company might work together using Siebel PRM, including:

- *Managing Sales with Siebel PRM*
- *Managing Service Requests with Siebel PRM*
- *Managing Marketing Campaigns with Siebel PRM*
- *Managing Partner Commerce*

The scenarios illustrate many possible uses of Siebel PRM. These scenarios generally do not apply to the public sector. The methods of sharing data and of working together that are most commonly used in the public sector are discussed in the following topics:

- *Process of Referring Benefits Cases to Service Providers*
- *Agency Tasks*
- *Service Provider Tasks*

Scenario for Using Siebel Public Sector to Work with Service Providers

This topic gives one example of how Siebel Public Sector might be used to work with service providers. You might use Siebel Public Sector to work with service providers differently, depending on your business model.

At an agency, the benefits administrator uses Siebel Public Sector to define the benefits that the agency provides for children placed in foster homes. The benefits administrator's supervisor reviews the benefit plan and approves it.

A home that provides beds for foster children applies for a license to qualify as a service provider for this agency. The agency reviews the application and licenses the service provider as an official provider.

After licensing the service provider, the agency gives the provider access to Siebel Public Sector Provider Portal. The provider uses Siebel Public Sector Provider Portal to add its profile, which includes the special services that it provides, its location, and its languages. One of its languages is Russian.

The provider also uses Siebel Public Sector Provider Portal to add its inventory. It currently has five beds available for foster children.

At the agency, a case worker uses the Siebel Public Sector home page first to see which benefits cases require his immediate attention. Today, he is scheduled to interview a child in relation to child abuse. The child speaks Russian. This benefits case might require placing the child in a foster home.

During the interview, the case worker adds more information about the child in the Cases screen of Siebel Public Sector. The case worker also uses the Cases screen to see the child's benefit plan. Based on all available information, the case worker decides that the child must be placed in a foster home.

The case worker searches in the Service Provider screen, Profiles view to find foster homes that speak this child's language. The case worker chooses the newly added service provider as the foster home and places a referral order for a bed at this service provider.

The service provider logs in to Siebel Public Sector Provider Portal. After clicking the My Orders link on the home page, the service provider sees this new referral order to place a child. The service provider accepts the referral order.

After accepting this referral order, the service provider uses the portal to manage its inventory, indicating that only four beds are available.

Tasks for Setting Up Siebel Public Sector to Work with Service Providers

The tasks for setting up Siebel PRM in *Process of Setting Up Siebel PRM* generally apply to the public sector, but there are also the following added or modified tasks:

- *Integrating Siebel Public Sector Provider Portal with External Applications*
- *Modifying Lists of Values for Managing Public Sector Providers*
- *Creating Products for Public Sector Service Providers*
- *Creating Price Lists for Public Sector Service Providers*
- *Activating or Inactivating Navigation Links for the Service Provider Portal*

Integrating Siebel Public Sector Provider Portal with External Applications

For general information about integrating Siebel PRM with external applications, see *Setting Up Application Services Interfaces for Siebel PRM*

The following types of integration are specific to Siebel Public Sector Provider Portal.

Integrating with External Procurement Applications

Information is sent to an external procurement application when you submit a referral order to a service provider, as described in *Submitting Referral Orders*.

You must modify the SWISendOrder workflow to integrate with an external procurement application. For more information, see *SWIPUBSendOrder Workflow*.

To implement the functionality for submitting referral orders, administrators can integrate Siebel Public Sector with Oracle Application Integration Architecture. This integration facilitates the transfer of referral order data between Siebel Public Sector and Oracle Application Integration Architecture. To integrate Siebel Public Sector with Oracle Application Integration Architecture, use the Oracle Application Integration Architecture Foundation Pack. For more information, see the documentation set for the Oracle Application Integration Architecture Foundation Pack.

Oracle Application Integration Architecture is a set of products that enables you to set up and orchestrate cross-application business processes so that multiple applications can work together. After referral order data for a benefit is forwarded to Oracle Application Integration Architecture, Oracle Application Integration Architecture forwards the referral order data to a procurement application, and consequently the order is fulfilled. The procurement application returns fulfillment data, such as the status of the referral order, to Siebel Public Sector through Oracle Application Integration Architecture.

Integrating with Contract Management Systems

You can use the Agreements view of the Service Providers screen to add agreements with the service provider manually, as described in *Adding Agreements with Service Providers*. It is also possible to integrate Siebel Public Sector with third-party contract management systems using Web services. For more information, see *Siebel CRM Web Services Reference* .

Modifying Lists of Values for Managing Public Sector Providers

There are two sets of UI elements that you must add values to:

- Multivalue groups
- Picklists

Modifying Values in Multivalue Groups

You can add values to multivalue groups, which are displayed in the dialog boxes that service providers use to choose certain options, so all service providers choose from the same list of values. For example, add values displayed in the dialog box that service providers use to choose which religions they can accommodate, so that every service provider chooses from the same list of religions.

It is recommended that you enter the values that you want displayed in the following dialog boxes in the Service Providers screen, Profile view:

- Languages
- Food
- Expertise
- Religions

To add values to dialog boxes

1. Navigate to the Service Providers screen, then Profile view.
2. For each field, click the Multiple Select button to display the dialog box.
3. In the dialog box, add a new record to add new records, and complete the necessary fields.

Modifying Values in Picklists

You can change values in picklists that you use to choose certain options, to suit your business model. For example, change the values available in the Type field of the Agreement record, so that it lists the types of agreements that you have with your service providers.

It is recommended that you modify the values in the picklists in the fields shown in the following image. You might also need to modify the values in other picklists, depending on your business model.

Screen and View	Field	Type Code in List Of Values Administration
Agreements screen, Agreement List	Type	AGREEMENT_TYPE
Agreements screen, Agreement List	Status	SRV_AGREE_STATUS
Service Providers screen, Assets view	Status	IMPL_PHASE
Service Providers screen, Service Providers Form	Stage	PARTNERSHIP_STAGE
Service Providers screen, Service Providers Form	Status	ACCOUNT_STATUS

For more information about modifying picklists, see *Siebel Applications Administration Guide* .

To modify values in picklists

1. Navigate to the Data screen, then List of Values view.
2. In the List of Values list, in the Type field, query for the type code that you want listed in *Modifying Lists of Values for Managing Public Sector Providers*.
3. Add, modify, and delete records, so that there is one record with that type code for each option to be displayed in the picklist.

   The Type field of the record must have the type code for the field, and the Display Value field of the record must have an option displayed in the picklist.
4. Click Clear Cache.

Creating Products for Public Sector Service Providers

You must use the Administration - Product screen to create products representing the resources that your service providers provide. Some examples of typical products are Foster Care Standard Bed, Lightweight Wheelchair, and Senior Home - One Bedroom. It is recommended that you create a standard set of products to be used by all of your service providers. For information about creating products, see *Siebel Product Administration Guide* .

When you create products, you can also create product types, which are categories of products used for your own record keeping. Some examples of typical product types used to work with service providers are Drug Counseling, Job Training, Wheelchair, Foster Care Bed, and House Cleaning Service.

Also, when you create products, you can create product classes and attributes, and then you can associate those attributes with a product class. For example, you can create a child care product class. Then you can create an age group attribute with values that could include infant, toddler, pre-school, and kindergarten. You can then associate the child care product with the age group attribute. For more information about creating product classes and attributes, see *Siebel Product Administration Guide* .

To make products visible to service providers, you must associate the products with a catalog and associate the catalog with the access group for the service provider. For more information about working with catalogs, see *Siebel Order Management Guide* .

Creating Price Lists for Public Sector Service Providers

Price lists are used differently for working with public sector providers than they are in Siebel PRM. You must associate each public sector provider with a price list to specify the prices that it charges for each service that it provides. For more information, see *Specifying Price Lists for Service Providers*.

You can create standard price lists in advance, with prices that you would expect to be used by many service providers. You can also create price lists based on prices that you negotiate with a specific service provider. Siebel Pricer calculates the prices for the products from each service provider, calculating how much the government pays to the service provider, and how much the citizen pays to the government, if anything.

For more information about creating price lists, see *Creating Price Lists for Siebel PRM* and *Siebel Pricing Administration Guide* .

Activating or Inactivating Navigation Links for the Service Provider Portal

Navigation links are displayed on the Home Page of the Service Provider Portal and allow service providers to access the most important screens of the portal. This procedure tells you how to display the links that are appropriate for the Service Provider Portal.

To activate and inactivate navigation links for the Service Provider Portal

1. Log into the Siebel Business application.
2. Navigate to the Administration - Application screen, then the Navigation Links view.
3. To inactivate navigation links that are not appropriate for service providers:
    - Query for the navigation links Request Collaboration, My Opportunities, My Customer Service Request, and Request Funds.
    - For each, set the Active flag to N, and save the record.
4. To activate navigation links that are appropriate for service providers:
    a. Query for the navigation links Service Orders, Agreements, Cases, Manage Profile, and Assets.
    b. For each, set the Active flag to Y, if it is not already Y, and save the record.
5. Log into the Service Provider Portal to confirm that only the links you have selected are displayed.

Process of Setting Up New Service Providers

To set up a new service provider

1. *Adding New Service Providers to Siebel Public Sector*. Add the service provider as a partner. This task is similar but not identical to adding new partners in Siebel PRM.
2. *Adding Users of Siebel Public Sector Provider Portal (Service Provider)*. The agency generally adds just one service provider employee as a user of Siebel Public Sector Provider Portal. That employee has the position of delegated administrator and can define positions and add other users at the service provider company.
3. **Adding the service provider profile.** The service provider profile includes information such as the special expertise that the service provider has. It can be added either by the agency or by the service provider:
    - *Managing Service Provider Profiles*
    - *Managing Service Provider Profiles (Service Provider)*
4. **Licensing the service provider to provide specific services.** The licensing is done outside of Siebel Public Sector, and it can use the same methods that the agency has used traditionally to license service providers. The services must be one or more of the services you defined as a product. For more information, see *Creating Products for Public Sector Service Providers*.
5. *Specifying Price Lists for Service Providers*. Negotiate an agreement with the service provider to provide these services at specific prices. After you have negotiated pricing, create a new price list for the service provider if necessary, or associate the service provider with an existing price list.
6. *Adding Agreements with Service Providers*. Add information about the agreement you have negotiated into Siebel Public Sector.
7. *Adding the Initial Inventory for Service Providers*. Add the inventory showing how many of the services are available at the provider.

Adding New Service Providers to Siebel Public Sector

There are several ways of setting up new service providers:

- It is most common for providers to apply to be partners using paper forms. In this case, add them as described in this topic.
- If providers apply online to be partners, you can add them in the same way that you add partners in Siebel PRM, as described in *Process of Enrolling a New Partner Company*.

Note: If you add service providers using the same process as Siebel PRM, be sure the checkbox in the Service Provider field of the Partner record is selected before you register the partner.

- You can also add service providers from an account. In this case, add them as described in this topic.
- You can import data about the service provider from another application.

This task is a step in *Process of Setting Up New Service Providers*.

Adding Service Providers Who Apply Using Paper Forms

In Siebel PRM, individuals and companies typically apply online to become partners. When they register in the Siebel Partner Portal, they add information that is stored in a prospective partner record. When they are qualified as partners, the prospective partner record is converted to a partner record.

Public sector agencies usually receive applications from service providers on paper, not online. If the agency accepts the service provider as a partner, the agency adds the service provider to Siebel Public Sector.

After you recruit and accept applications from service providers in the same ways that you have in the past, using paper application forms, add new service providers using the following procedure.

To add new service providers

1. Navigate to the Service Providers screen, Service Provider List view.
2. Add a new record to the Service Provider list and complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	Enter the name of the service provider.
Status	Select Active. **Note:** The status must be Active before you can place orders with the service provider.
Address	Enter the address of the service provider.
Price List	Select the price list for this service provider. For more information, see *Creating Price Lists for Public Sector Service Providers*.
Provider Id	Displays the row Id of the service provider, which is read-only.

3. Create an organization for the partner company:

   Note: For background information about organizations and partner managers for partner companies, see *Registering the Partner Company*.

   a. Navigate to the Administration - Partner screen, Qualified Partners view.
   b. Query for the name of the service provider that you just created.
   c. With the record selected, click Register.
   d. In the Register Partner view, complete the necessary fields described in the following table, and then click Save.

Field	Description
Organization	Select this checkbox to make the partner company an organization.

Field	Description
Parent Organization	Select the parent organization of the partner organization.
Partner Manager	Select the partner manager at the public agency for this partner organization.

4. Continue the process of adding the partner company, as described in *Process of Enrolling a New Partner Company*, performing any needed steps in the process after the step for adding the partner company.

> **Note:** In addition to adding the partner to Siebel Public Sector, as described in this topic, you must add at least one agreement to provide services with the partner before you can work with a partner. For more information, see *Adding Agreements with Service Providers*.

Adding Service Providers from Accounts

Follow the steps in this procedure to add service providers from accounts.

To add service providers from Accounts

1. Convert a Customer Account to a Service Provider by doing the following:
   a. Navigate to the Accounts screen.
   b. In the Accounts list, select the customer account that you want to convert to a partner.
   c. Display the More Info view.
   d. In the Account Administration Details section, select the Service Provider option.
2. Create a new service provider. For more information on creating a service provider, see *Adding New Service Providers to Siebel Public Sector*.
3. Register the new service provider, by doing the following:

> **Note:** For background information about organizations and partner managers for partner companies, see *Registering the Partner Company*.

   a. Navigate to the Administration - Partner screen, Qualified Partners view
   b. Query for the name of the service provider that you just created.
   c. With the record selected, click Register.
   d. In the Register Partner view, select the Organization option, and then click Save.
4. Register for a User Id. For more information on registering for a User Id, see *Registering for a User ID (Partner Employee)*.
5. Create a new user for your service provider. For more information about adding users, see *Delegated User Administration for Partners*.
6. Navigate to the Administration - Partners screen and find the provider record that you just registered and create a new primary position. For information on creating a new primary position, see *Delegated User Administration for Partners*.
7. Add the Partner Sales Rep and the Partner Service Manage responsibilities to the new primary position and associate them with the new user. For more information on defining responsibilities, see *Defining Partner Responsibilities*.

Adding Users of Siebel Public Sector Provider Portal (Service Provider)

When approved, a provider can set up positions and set up its employees as users who can access Siebel Public Sector Provider Portal.

This task is a step in *Process of Setting Up New Service Providers*.

For more information about how the provider sets up positions and users, see *Delegated Administration for Partners*.

Managing Service Provider Profiles

The service provider profile view for Siebel Public Sector is significantly different from the partner profile view for Siebel PRM, because it includes information that is specific to the public sector, such as languages and religions. The profile information allows you to refer benefits cases to the service provider with the appropriate language, religion, or other accommodations for each benefits case.

This task is a step in *Process of Setting Up New Service Providers*.

The agency can add, update or view the profile in Siebel Public Sector, as described in this procedure. Alternatively, the service provider can update or view the profile in Siebel Public Sector Provider Portal. For more information, see *Managing Service Provider Profiles (Service Provider)*.

To add the service provider profile

1. Navigate to the Service Providers screen, then the Service Provider List view.
2. Drill down on the name of the service provider that you want.
3. Display the Profile view.
4. In the Profile form, complete the necessary fields. Some fields are described in the following table.

Field	Description
Languages	Select the languages spoken at this service provider.
Wheel Chair Access	Select this check box if the facilities of the service provider are wheelchair accessible.
Food	Select special types of food that the service provider offers, such as hallal food or vegetarian food.
Expertise	Select the types of services that this provider has expertise in.
Religions	Select the religions accommodated at this service provider.
Date Established	Enter the date when this service provider business was established.

Field	Description
# of Locations	Displays the number of locations for this service providers. This calculated field is based on the number of addresses for this service provider that have been added in the Service Providers screen, Addresses view.

Managing Service Provider Profiles (Service Provider)

You use the information in the service provider profile to refer the appropriate benefits cases to the service provider. The service provider can add, update, or view the profile in Siebel Public Sector Provider Portal, as described in this procedure. Alternatively, the agency can add, update, or view the profile in Siebel Public Sector. For more information, see *Managing Service Provider Profiles*.

This task is a step in *Process of Setting Up New Service Providers*.

To add the service provider profile

1. In Siebel Public Sector Provider Portal, navigate to the Profile screen, Service Profile view.
2. In the Service Profile form, complete the necessary fields.
3. These fields are the same as the fields in the Profile view used by the agency. For more information, see *Managing Service Provider Profiles*.
4. Click Save.

Specifying Price Lists for Service Providers

After you have licensed the service provider to provide specific services, you negotiate agreements with the service provider determining the prices that it receives for these services. Then you associate the service provider with a new or existing price list that specifies these prices. For information about creating price lists, see *Creating Price Lists for Public Sector Service Providers*.

This task is a step in *Process of Setting Up New Service Providers*.

To specify the price list for a service provider

1. Navigate to the Service Providers screen, then the Service Providers List view.
2. In the record for the service provider that you want, in the Price List field, choose the appropriate price list.

Adding Agreements with Service Providers

After negotiating agreements with the service provider, you also add data about the agreement in Siebel Public Sector.

This task is a step in *Process of Setting Up New Service Providers*.

You must negotiate at least one agreement to set up a new service provider. Later, you can also negotiate, and add additional agreements with existing service providers. When you add an agreement with a service provider, you also add a list of products that the agreement covers and an initial inventory of the number of each of those products that

the service provider has available. The agreements and inventory of assets covered by each agreement are also visible to the service provider in the Asset screen of Siebel Public Sector Provider Portal.

Note: Rather than adding agreements in this way, you can integrate Siebel Public Sector with a third-party contract management system. For more information, see *Integrating Siebel Public Sector Provider Portal with External Applications*.

To add agreements with a service provider

1. Navigate to the Service Providers screen.
2. Drill down on the name of the service provider that you want.
3. Display the Agreements view.
4. In the Agreements list, create a new record and complete the necessary fields, as described in the following table.

Field	Description
Agreement #	Displays the agreement number, a read-only value generated by Siebel Public Sector.
Type	Select the type of the agreement. For information about customizing the values in this field, see *Modifying Lists of Values for Managing Public Sector Providers*.
Status	By default, the status is Current when you create the record. Select Active when the negotiations are complete and the agreement is operative. You can select Cancelled at some later time to cancel the agreement.
Address	Select the address where this service is provided. Only addresses defined for this service provider can be selected.
Start	Enter the date when the agreement takes effect.
End	Enter the date when the agreement expires. If no date is entered, the agreement lasts indefinitely.

5. In the Line Items list, create a new record for each product covered by this agreement, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Product	Select the product. The list includes products that you defined, as described in *Creating Products for Public Sector Service Providers* .

Adding the Initial Inventory for Service Providers

When you add the agreement to provide products, you can also add the service provider's inventory of each of those products. Each item in the inventory is an asset. For example, you have just negotiated an agreement for the service provider to provide foster care beds, and the service provider has four beds available. In this example, the product is Foster Care Bed, and the inventory includes four assets, each representing one bed.

Because service providers provide the product, they manage the inventory of the product, see *Managing Inventory for Accepted Referral Orders (Service Provider)*, so you always know whether they have unused assets available for this product. The agency can enter the initial inventory at the same time that it enters the agreement.

You can also use the following procedure to manage inventory later. For example, if a foster home adds new beds, you must add asset records for each new bed.

Note: The Create Asset button is only enabled for the latest agreement revision with the status of Active or Current. For example, if an agreement has revision 1 and revision 2, you can only create assets for revision 2.

This task is a step in *Process of Setting Up New Service Providers*.

To add the initial inventory

1. After adding the agreement and products, select the product record that you want, and click Create Asset.

   The Assets list appears with a new asset based on that product. The Product, Agreement #, and Agreement Item Id fields of the Asset record have the values for that product.
2. If necessary, select the attribute values for the asset.

   The attributes and the values that you can select for depend on the definition of the product. For example, if the product is child care, your product administrator might have defined the product so one attribute is Age Group, and the possible values of this attribute are Infant, Toddler, Pre-school, and Kindergarten.
3. If necessary, you can add additional assets directly in the Assets list:
   a. Create a new record for each asset, and complete the necessary fields, as described in the following table.

Field	Description
Asset #	Displays the asset number.

Field	Description
Type	When you select a product in the Product field, this field displays the product type that was defined for that product. For more information, see *Creating Products for Public Sector Service Providers*.
Status	Select Active to show that the asset is available.
Agreement #	Select the agreement that this product is provided under. The dialog box includes only the latest revision of agreements with the status of Active or Current.
Agreement Item Id	Select the agreement Id for this product in this agreement. If you select the product first, only the Id of this product is available in the dialog box. Once the Agreement Item Id is selected, the Product field becomes read-only. If you select Agreement # and then Agreement Item Id before selecting a product, then the Product field will be automatically populated with the same product that was selected under the Agreement Item Id field and the Product field will be read-only
Product	Select the product that this asset is an instance of.

b. If this product has attributes, add records to the Attributes list and select the attributes and a value for each.

For more information about product attributes, see *Siebel Product Administration Guide* .

Process of Referring Benefits Cases to Service Providers

This process assumes that the agency has already completed the following:

- Created the benefits case. The case record must have Benefit in the Category field and must have at least one contact.
- Approved the benefits case for eligibility.
- Created the benefit plan.

For more information about these tasks, see *Siebel Public Sector Guide* .

To refer a benefits case to a service provider, perform the following tasks:

1. *Creating Referral Orders for Benefits*
2. *Submitting Referral Orders*
3. *Accepting or Rejecting Referrals (Service Provider)*
4. *Managing Inventory for Accepted Referral Orders (Service Provider)*
5. *Checking the Status of Referrals*

Creating Referral Orders for Benefits

After deciding which service provider you want to use, you can place a referral order with that service provider that is based on one benefit that has been determined for the benefits case.

This task is a step in *Process of Referring Benefits Cases to Service Providers*.

The status of the benefits case must be Active to create a referral order. You can create only one referral order for each benefit. If necessary, you can cancel it, and then create a new referral order.

If a benefit does not have a value of Product or Service in the Type field and does not have any value in the Product field and the Service Provider field, you cannot create a referral order for the benefit, and the Create Order button is disabled.

When you create a referral order for a benefit, Siebel Public Sector:

- Populates the Order number (#) field for the benefit.
- Adds the created referral order to the Orders view in the Plans view of the Cases screen, to the Orders view of the Service Providers screen, and to the List view of the Service Orders screen.

You can click the Cancel Order button (or change the Status field for the referral order to Cancelled) to cancel the referral order and clear the Order number (#) field. Also, the Benefit and Benefit Id fields under the Service Order will be cleared when you click the Cancel Order button. Cancelling a referral order does not delete it. If you want to delete a referral order, you must delete it from an Orders view or the Service Orders screen. For more information about creating referral orders, see *Siebel Order Management Guide* .

To create a referral order for a benefit

1. Navigate to the Cases screen, then the Case List view.
2. Drill down on the Case Name field for the benefits case that you want.
3. Display the Plans view.
4. In the Benefit Plans list, select the benefit plan for which you want to create the referral order.
5. In the Benefits list, select the benefit in this plan for which you want to create the referral order.
6. In the selected benefit, complete the necessary fields, as described in the following table.

Field	Description
Benefit Name	The name must be entered for you to create an order.
Product	The product provided by this benefit must be entered for you to create an order.
Type	Select Service or Product. You must use one of these two types to create an order.
Provider	Select the provider for this referral order. Click the Single Select button to display the Benefit Provider dialog box. If necessary, click the Query button in this dialog box to display a query form that lets you find providers with the required combination of attributes, such as Postal Code, Expertise, Language, Religions, Food, and Wheelchair Access.

7. If necessary, click Cancel Order to cancel an existing referral order before creating a new referral order.

   If there is already an open order, the Create Order button is disabled and the Cancel Order button is enabled. After you click Cancel Order, the Create Order button is enabled.
8. Click Create Order.

   > **Note:** The status of the provider must be Active at the time you click Create Order.

   The Line Items view for the referral order appears in the Service Orders screen, the Type field is populated with a value of Referral Order, and other fields in the referral order are populated with values from the benefits case. A line item is added for the product specified in the Benefits list. The contact, product and provider in the Benefit record and the contact in the Order become read only; these fields become editable if the order is cancelled.
9. If necessary, add to or change information in the referral order.

   > **Note:** Attribute values that you change in the referral order are not changed on the benefits case.

Submitting Referral Orders

This task is a step in *Process of Referring Benefits Cases to Service Providers*.

After an agent creates a referral order for a benefit or a benefits case, the agent can submit referral order data to a procurement application and consequently fulfill the referral order. The procurement application returns fulfillment data, such as the status of the referral order, to Siebel Public Sector.

> **Note:** To implement the functionality for submitting referral orders, administrators must integrate Siebel Public Sector with a procurement application. This integration allows the transfer of referral order data between Siebel Public Sector and the procurement application. For more information about integrating Siebel Public Sector Provider Portal with other applications, see *Integrating Siebel Public Sector Provider Portal with External Applications*.

To submit a referral order

1. Navigate to the Service Orders screen, then the Order Entry List view.
2. Drill down on the Order number (#) field for the referral order that you want to submit.
3. In the order form, click Submit.
4. The Status field for the referral order changes from Pending to Submitted-Pending.

Accepting or Rejecting Referrals (Service Provider)

The referral order appears in the list of service orders linked from this provider's home page in Siebel Public Sector Provider Portal. The service provider can use Siebel Public Sector Provider Portal to accept the referral order, put the referral order on its waiting list, or reject the referral order.

If the referral order is put on a waiting list, the service provider can come back to the referral order later to accept or reject the referral order. For example, it can accept the referral order after the resource becomes available. However, the agency might assign the referral order to another service provider in the interim, and then this service provider would no longer have the opportunity to accept it.

This task is a step in *Process of Referring Benefits Cases to Service Providers*.

To accept the order, put the order on a waiting list, or reject the order

1. Log in to Siebel Public Sector Provider Portal.
2. On the home page, click the My Orders link.
3. Drill down on the Order number (#) field of the new service order.

   The order form appears.
4. In the Status field, select Accepted, Rejected, or Waitlisted.

Managing Inventory for Accepted Referral Orders (Service Provider)

If the service provider has accepted the referral order, then it must also manage its inventory to indicate that this resource is no longer available. For example, if it has accepted a new foster child, it must manage its inventory to indicate that the asset representing this foster-child bed has been taken.

This task is a step in *Process of Referring Benefits Cases to Service Providers*.

The agency adds items to the inventory list when the service provider agrees to provide this product to the agency. For more information, see *Adding Agreements with Service Providers*. In Siebel Public Sector Provider Portal, the service provider indicates the availability of assets by changing the value in the Status field.

To manage inventory

1. In Siebel Public Sector Provider Portal, navigate to the Assets screen, then the List view.
2. In the appropriate Asset record, in the Operating Status field, select the value used to indicate that the asset is being used and is not available.

   This value depends on how the values in the picklist were configured in the setup task *Modifying Lists of Values for Managing Public Sector Providers*.

Checking the Status of Referrals

After the service provider has had time to respond to the referral order, the case worker checks the referral order to see whether the service provider has accepted it. The initial status of the order is Submitted-Pending. The service provider acts on the order by changing the status to Accepted, Rejected, or Waitlisted.

If the service provider has rejected the referral order, the case worker refers it to another service provider. If the service provider has put the referral order on a waiting list, the case worker can either refer it to another service provider, or wait to see whether the service provider accepts the referral order.

This task is a step in *Process of Referring Benefits Cases to Service Providers*.

To check the status of the referral

1. Navigate to the Service Providers screen.
2. Drill down on the name of the service provider that you want.

3. Display the Orders view.
4. Look at the Status field of the referral order.
5. If necessary, cancel the referral order, and create a new referral order.

   See *Creating Referral Orders for Benefits*. You must select Cancelled in the Status field for the old order before you create the new order.

Agency Tasks

The agency can use Siebel Public Sector to perform many of the same tasks that the brand owner performs using Siebel PRM. For more information, see *Differences Between Siebel Public Sector and Siebel PRM*.

Some tasks that the agency performs that are specific to Siebel Public Sector are described in *Process of Referring Benefits Cases to Service Providers*. Other tasks that the agency performs that are specific to Siebel Public Sector include the following:

- *Adding Addresses for Service Providers*
- *Viewing and Updating Referral Orders*
- *Sharing Information About Cases with the Service Provider*

Adding Addresses for Service Providers

If a service provider has multiple addresses, you add the addresses using the following procedure.

To add addresses for a service provider

1. Navigate to the Service Providers screen.
2. Drill down on the name of the service provider that you want.
3. Display the Addresses View.
4. In the Addresses list, add new records, and complete the necessary fields.

Viewing and Updating Referral Orders

A user at the agency can view all referral orders for a given provider and update the order status. Referral orders used for working with service providers in Siebel Public Sector are similar to standard service orders in Siebel Business Applications. They have additional features that are specific to the public sector. For general information about orders in Siebel Business Applications, see *Siebel Order Management Guide* .

> **Note:** Referral orders are not created in the view described in this topic. For information about how referral orders are created, see *Creating Referral Orders for Benefits*.

To view or update referral orders

1. Navigate to the Service Providers screen.
2. Drill down on the name of the service provider that you want.
3. Display the Orders view.

4. In the Order record, update the Status field if the status of the referral order has changed.
5. In the Order record list, drill down on the Order number (#) field for the referral order that you want to view its line items.

Sharing Information About Cases with the Service Provider

You can share information about cases across multiple organizations. Service providers can access all cases assigned to their organization in the Public Sector PRM Portal.

The agency and service provider can share additional information about cases by adding activities, attachments, service requests, or notes to the case record.

To share information about a case with the service provider

1. Navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Display the Activities, Attachments, Service Requests, Contacts, or Notes view.
4. To view information that the service provider has shared, scroll through the existing records.
5. To share information with the service provider, add a new record and complete the necessary fields.

Service Provider Tasks

The service provider uses Siebel Public Sector Provider Portal to perform many of the same tasks that partners perform using Siebel Partner Portal. For more information, see *Differences Between Siebel Public Sector and Siebel PRM*.

Some tasks that the service provider performs that are specific to Siebel Public Sector are described in *Process of Referring Benefits Cases to Service Providers*. Other tasks that the service provider performs that are specific to Siebel Public Sector include the following:

- *Managing Inventory (Service Provider)*
- *Viewing Referral Orders (Service Provider)*
- *Viewing Agreements (Service Provider)*
- *Sharing Information About Cases with the Agency (Service Provider)*

Managing Inventory (Service Provider)

The service provider can manage its inventory by selecting values in the Status field of the Asset record. The available values depend on how you configured that field in the setup task *Modifying Lists of Values for Managing Public Sector Providers*.

The Status field of the asset is used to manage inventory in the following ways:

- When the agency adds a new asset that a service provider can provide, it selects Active in the Status field to indicate that the asset is unused and available. See *Adding the Initial Inventory for Service Providers*.
- When the service provider accepts an order, it selects a value in the Status field to indicate that the asset is being used and is not available. See *Accepting or Rejecting Referrals (Service Provider)*.

The service provider also uses the Status field to manage inventory at other times. For example:

- If a child leaves a foster care home, the service provider must change the value in the Status field for that asset to Active, to indicate that it is available again. Whenever any asset becomes available for use, the service provider must change the status to Active.
- If your foster homes are partially remodeled and some of the beds are not available during construction, the service provider can change the value in the Status field for those assets to Maintenance to reflect this change.

The value, Maintenance, is an example of a value that you might add to the options in this picklist. The options that are available depend on how you configure this list of values in the setup task *Modifying Lists of Values for Managing Public Sector Providers*.

To manage inventory

1. In Siebel Public Sector Provider Portal, navigate to the Assets screen, then the List view.
2. In the appropriate Asset record, in the Status field, select the value that you want.

Viewing Referral Orders (Service Provider)

The service provider can view all referral orders from the agency and can update the order status.

When the service provider has accepted a referral order, it has an agreement with the agency to provide the service requested in the referral order. The Orders list allows the service provider to view referral orders from the agency, including those it has already accepted and those it has not yet accepted. For more information about how referral orders are created and accepted or rejected, see *Process of Referring Benefits Cases to Service Providers*.

To view referral orders

1. In Siebel Public Sector Provider Portal, in the Home page, click the My Orders link.
2. In the Orders list, drill down on an order number to view more details for that referral order.

Viewing Agreements (Service Provider)

A service provider can view all its agreements with the agency but cannot modify them.

To view agreements

1. In Siebel Public Sector Provider Portal, navigate to the Administration - Agreements screen.
2. Drill down on an Agreement Name field to view more information about that agreement.

   The fields have the same value as the fields in the Agreements view used by the agency. For more information, see *Adding Agreements with Service Providers*.

Viewing Cases (Service Provider)

The service provider can view all cases from the agency.

To view cases

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on a Case Name field to view more information about that case.

Sharing Information About Cases with the Agency (Service Provider)

Agencies and services providers can share information about cases by adding activities, attachments, service requests, contacts, or notes to the case record.

To share information about a case with the agency

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Display the Activities, Attachments, Service Requests, Contacts, or Notes view.
4. To view information that the agency has shared, scroll through the existing records.
5. To share information with the agency, add a new record and complete the necessary fields.

Adding Activities to Cases

Service providers can use the Provider Case Activities view of the Provider Portal Case Detail screen to create the activities and assign each activity to a team member. The list of activities provides a history of the actions that you perform in connection with the case.

To add activities to cases

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case record you want.
3. Navigate to the Activities view.
4. Create a new record, and complete the fields as appropriate.

   The following table describes some of the fields.

Field	Description
Type	Select the type of activity.
Planned Start	Select the date and time that you plan to begin the activity.
Description	Displays the description of the activity.
Due	Enter a due date for the activity.
Status	Displays the status of the activity.

Field	Description
Priority	Select the priority of the activity.

5. (Optional) Select the check box in the Web Access field if you want the citizens with self-service access to the case to see the activity when they view details about the case on a self-service Web site for Siebel Public Sector E-Support.
6. Save the record.

Adding Attachments to Cases

Service providers can add more detail to a case record by attaching relevant documents and other external media using the Attachments view of the Provider Portal Case Detail screen. The attachment can be in any format, such as a word-processing document or a spreadsheet containing details of a case analysis. Attachments are useful in building an electronic case folder so that all interested parties can share information.

To add attachments to cases

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Navigate to the Attachments view.
4. In the Attachment Name field, click single select button.
5. Specify a File name or New URL to associate a document or other media with the case record and add a record.
6. (Optional) Select the check box in the Web Access field if you want the citizens with self-service access to the case to see the attachment when they view details about the case on a self-service Web site for Siebel Public Sector E-Support.

Adding Service Requests to Cases

Use this view to initiate a request for action or service fulfillment for the incident. For more information about service requests, see *Siebel Field Service Guide*.

To add service requests to cases

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Navigate to the Service Requests view.
4. Add a record to add an existing Service Request or add a new record and complete the fields as appropriate.
5. (Optional) click Collaborate, if you have configured the Collaborate functionality.

Note: For more information about configuring the Collaborate functionality, see the *Siebel Collaboration Guide.*

Adding Notes to Cases

Users can also record an important note about a case and share the note with other agents, or they can designate a note as private so that only the user who created the note can view it.

To add notes to cases

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Navigate to the Notes view.

4. Select the appropriate value from the Notes drop-down list.
    - Select Public Notes to share the note with team members.
    - Select Private Notes to not share the note.
5. Create a new record, and complete the fields as appropriate.
6. (Optional) Click Check Spelling to verify spelling in the note text.

Associating Contacts with Cases

You can add existing and new contacts to cases in the Provider Case Contacts View. Users can enter details about individuals to contact in relation to the case, such as police chiefs, sheriffs, public information agents, and emergency response team members. You can use contact information for notification and correspondence purposes.

To associate a contact with a case

1. In Siebel Public Sector Provider Portal, navigate to the Cases screen.
2. Drill down on the Case Name field of the case you want.
3. Navigate to the Contacts view.
4. Add a record to add an existing contact or add a new record to create a new Contact record and complete the fields as appropriate.
5. Select the check box in the Web Access field to give citizens with self-service access to view details about cases.
6. (Optional) If you have set up Effective Date functionality, click Effective Date to capture historical values.

   For more information about setting up Effective Date functionality, see *Siebel Public Sector Guide* .
7. Click Save.

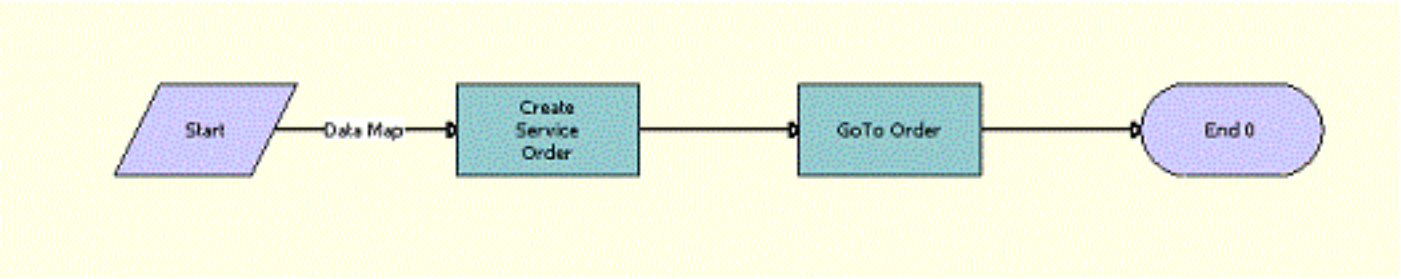
Workflow Reference for Siebel Public Sector Provider Portal

Siebel Public Sector uses the following workflows for managing public sector service providers:

- *PUB Create Order Workflow*
- *SWIPUBSendOrder Workflow*

PUB Create Order Workflow

This workflow, shown in the following diagram, creates a referral order for a benefit. A user starts this workflow by clicking the Create Order button for a benefit in the Benefit Plans view.



As shown in this diagram, this workflow performs the following actions:

1. **Create Service Order.** This step creates a service order based on the data in the Benefit Line Item records. It uses the data map, PUB BenefitsToServiceOrder, to map the benefit line item to the order.
2. **Goto Order.** This step displays the Order Entry - Line Items XA view.

Associated Business Service Methods. The following table describes the steps in this workflow that call a business service method.

Workflow Step	Method Called	In Business Service
Create Service Order	DataTransfer	FINS Data Transfer Utilities
Goto Order	GotoView	PUB Workflow Service

SWIPUBSendOrder Workflow

This workflow, shown in the following diagram, submits referral order data from Siebel Public Sector to a procurement application. This workflow is used to query the order record and send it to an external procurement application. The procurement application returns fulfillment data, such as the status of the referral order, to Siebel Public Sector. A user starts this workflow by clicking the Submit Order button in the order form in the Line Items view in the List view of the Service Orders screen.

As shown in this diagram, this workflow performs the following actions:

1. **Query Service Order.** This step queries the Service Order record in the Siebel database based on the Row Id.
2. **Has Order.** If the Order Id is not null, this step executes the Get Parameters step. Otherwise, it executes the End step.

3. **Get Parameters.** This step gets the attributes that are necessary from the Siebel database to send along with the service order. The attributes are: Enterprise name, Message Id, Locale, and Language.
4. **Set Parameters.** This step sets the attributes found in the previous step as parameters to a Siebel Message.
5. **Send to AIA.** Administrators must replace this placeholder step with a step that implements the integration that they set up.

   > **Note:** Administrators can set up the integration in Oracle Application Integration Architecture or use some other type of integration. In either case, they must change this placeholder step to implement the integration that they use.

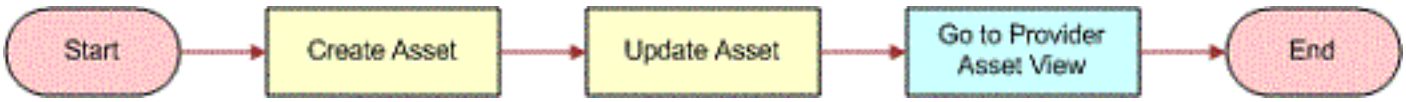
6. **Update Status.** This step changes the status of the service order to Submitted-Pending.
7. **Refresh Record.** This step refreshes the record so the change appears in the user interface.

Associated Business Service Methods. The following table describes the steps in this workflow which call a business service method.

Workflow Step	Method Called	In Business Service
Query Service Order	QueryById	SWI Order Update
Get Parameters	GetEnterpriseParameters	CMU External Integration Service
Set Parameters	SetAttributesToMessage	CMU External Integration Service
Refresh Record	RefreshCurrentApplet	FINS Teller UI Navigation

PUB Create Asset From Agreement Item Workflow

This workflow, shown in the following diagram, creates an asset from an agreement item.



As shown in this digram, this workflow perform the following actions:

1. **Create Asset.** This step creates a new asset for the product that is associated with the agreement record.
2. **Update Asset.** This step associates the new asset with the agreement item that it was generated from.
3. This step navigates to the PUB Service Provider Assets view.

Associated Business Service Methods. The following table describes the steps in this workflow that call a business service method.

Workflow Step	Method Called	In Business Service
Go To Provider Asset View	GotoView	PUB Workflow Service

Workflow Step	Method Called	In Business Service
Create Asset	Insert	None
Update Asset	Update	None

22 Themes

Themes

By default, the Web client uses the Aurora theme as the user interface theme. Depending on the deployment of your Web application, other themes, such as Redwood might be available. All themes generally have the same capabilities, and you can modify the end user experience to match other applications at a site.

Note: The Redwood theme is available in Siebel CRM 25.3 Update and later releases.

About the Redwood Theme

Redwood is a new a new theme for Partner Relationship Management that draws inspiration from the Oracle Redwood design experience. Redwood theme is available for the following Partner Relationship Management applications:

- Siebel PRM Portal
- Siebel Public Sector Provider Portal
- Siebel eDealer Partner Portal
- Siebel Loyalty Partner Portal
- Siebel HTIM Partner Portal

The main elements of Redwood theme are as follows:

1. **Ask Oracle** is a New Application Home and Global Navigation Experience.

   You can use **Ask Oracle** to do the following activities:

   - Search for Screens and Views
   - Access Tools available from List views
   - Navigate through Level 1 and Level 2 views
   - Receive Desktop Alerts/Toast Notifications

   Note: You can access **Ask Oracle** by clicking the **O** button on the homepage.

2. Redwood design-based Homepage, Screens, and Views
   - Homepage with simplified header
   - Application Toolbar and Menu Toolbar appear together as a single Toolbar
   - Option to show or hide the Application and Menu Toolbar
   - Option to show or hide the Search Toolbar
   - Use of Drawers instead of pop-up

3. New Styles, Colors, Icons, and Fonts
    - New style sheet, neutral colors, sleek icons, and contemporary fonts with Redwood styling
    - Labels across the Applet are on the left
4. Find and Filter
    - Find and filter to narrow down a criteria from Level 2, Level 3, and Level 4 menu

Setting the Redwood Theme

Although Redwood is not the default theme, Behavior view will allow users (anonymous, self-registered, or registered) to set Redwood theme and save it as User Preference for Partner Relationship Management applications. The Redwood theme is designed for Side Menu only and is not suitable for Tab or Tree navigation.

To set the Redwood theme

1. Navigate to **Application-level** > **Sitemap** > **User Preferences**

   The User Preferences screen appears if it is available.
2. Navigate to **Application-level** > **Tools** > **User Preferences**.

   The **User Preferences** screen appears.
3. Go to the Behavior view.

   The Behavior form appears.
4. Select the appropriate value from the drop-down list in the Navigation Control (Side Menu) and Theme field (Redwood).