



Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications

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1

What's New in This Release

What's New in Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications, Version 8.0

This guide has been updated to reflect product name changes. It was previously published as *Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications, Version 7.5, Rev. A*.

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Siebel Agent Portal

Oracle's Siebel Agent Portal allows insurance carriers to work with agencies, brokers, and other partners in the insurance and health care industries. You can work with partner employees as efficiently as you work with employees of your own company.

- To set up Siebel Agent Portal, you, as the insurance carrier, go through the process of enrolling partner companies. The insurance carrier can add these companies' employees or can assign this task to a delegated administrator at each company.
- Then, the insurance carrier can share opportunities, service requests, and other business information with partner employees as you do with your own employees.
 - The insurance carrier's employees work with this information using the Partner Manager, which lets them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Agent Portal.
- The insurance carrier can also use Partner Manager to:
 - Send alerts, 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, manage market development funds, and analyze performance.

This chapter includes the following topics:

- [Differences from Siebel PRM](#)
- [Differences in the Partner Portal and Partner Manager on page 10](#)
- [Adding New Partners on page 12](#)
- [Sharing Data with Partners on page 13](#)
- [Managing Sales, Service, and Marketing on page 17](#)
- [Managing Your Partners on page 17](#)

Differences from Siebel PRM

This document covers only features of Siebel Agent Portal that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

Differences that apply to the entire book are:

- **Terminology.** There are a few differences in terminology in Siebel Agent Portal:

- *Siebel Partner Relationship Management Administration Guide* uses the terms *brand owner* and *partner*. In the insurance industry, brand owner refers to the *insurance carrier*, and partner refers to the *agent, broker or partner*.
- *Siebel Partner Relationship Management Administration Guide* uses the term *quotes and orders* to refer to the transactional data that the user can display in the My Quotes view, the My Orders view, and so on. In Siebel Agent Portal, these are called *quotes* and *policies*. In Siebel PRM, partners can create a quote in the Quotes screen and save it as an order. In the Agent Portal, partners create both quotes and policies in the same screens; they use either the Personal Policies or the Group Policies screen to create a quote, and when it is purchased, it becomes a policy in the same screen.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel Agent Portal, in addition to these books, the reader should see *Siebel Insurance Guide* or *Siebel Healthcare Guide*.

The differences in terminology and cross-references described above apply to the entire *Siebel Partner Relationship Management Administration Guide*.

The rest of this chapter details differences that apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of the Siebel Partner Portal and the PRM-specific screens of the Siebel Partner Manager. There are a number of differences in the Agent Portal and Partner Manager for Financial Services.

Siebel Agent Portal

There are differences in the Agent Portal home page, and the Agent Portal has a number of screens that are not available in the Siebel Partner Portal. The differences in the home page and the additional screens are:

- **Home Page.** The Siebel Agent Portal home page includes the following applets:
 - **Salutation.** Greets the user by name and gives the date.
 - **My Tasks.** Displays links to common tasks for the user's role.
 - **Partner Alerts.** Displays alerts that you have made available to this partner.
- **Call Reports.** Incorporates the end-user functionality of the Call Reports screen of Siebel eInsurance and Siebel eHealthcare.
- **Claims.** Incorporates the end-user functionality of the Claims screen of Siebel eInsurance and Siebel eHealthcare.
- **Compensation.** Incorporates the end-user functionality of the Incentive Compensation screen of Siebel eInsurance and Siebel eHealthcare, and allows users to check their own compensation status.

- **Group Policies.** Incorporates the end-user functionality of the Group Policies screen of Siebel eInsurance and Siebel eHealthcare.
- **Households.** Incorporates the end-user functionality of the Households screen of Siebel eInsurance and Siebel eHealthcare.
- **Personal Policies.** Lists all Personal Policies, incorporating the end-user functionality of the following screens of Siebel eInsurance and Siebel eHealthcare: Auto Policies, Individual Health Policies, Life and Annuity, PUL Policies, Property Policies.

Siebel eInsurance Partner Manager

Instead of the home page used in Siebel Partner Manager, the Siebel eInsurance Partner Manager uses the same home page that is used by Siebel eFinance, eHealthcare, and eInsurance.

In addition to the screens of Siebel Partner Manager, Siebel eInsurance Partner Manager can include the following screens:

NOTE: Except for the Agents screen, these must be licensed separately from the Partner Manager product.

- **Agents.** Allows you to work with information about partner employees.
- **Auto Policies.** Similar to the Auto Policies screen of Siebel eInsurance.
- **Call Reports.** Similar to the Call Reports screen of Siebel eInsurance and Siebel eHealthcare.
- **Claims.** Similar to the Claims screen of Siebel eInsurance and Siebel eHealthcare.
- **Group Policies.** Similar to the Group Policies screen of Siebel eInsurance and Siebel eHealthcare.
- **Households.** Similar to the Households screen of Siebel eInsurance and Siebel eHealthcare.
- **Individual Health Policies.** Similar to the Individual Health Policies screen of Siebel eInsurance and Siebel eHealthcare.
- **Life and Annuity.** Similar to the Life and Annuity screen of Siebel eInsurance.
- **PUL Policies.** Similar to the PUL Policies screen of Siebel eInsurance.
- **Property Policies.** Similar to the Property Policies screen of Siebel eInsurance.

Added Views of the Partner Screen

The Partner screen allows you to work with information about partner companies. In addition to the views that the Partner screen has in Siebel Partner Manager, the Partners screen of Siebel eInsurance Partner Manager includes the following views:

- Contracts
- Errors and Omissions
- Licenses and Appointments

Added Views of the Partner Operations Screen

The Partner Operations screen allows you to view all of a partner company's transactional data. In addition to the views that the Partner Operations screen has in Siebel Partner Manager, the Partners Operations screen of Siebel eInsurance Partner Manager includes the following view:

- **Policies.** Allows you to view all of the policies of a partner company.

The Agents Screen

In addition to the Partners screen of Siebel PRM, which lets you work with information about partner companies, Siebel eInsurance Partner Manager includes an Agents screen, which lets you work with information about partner employees. The Agents screen includes the following views:

- More Info
- Contracts
- Licenses and Appointments
- Errors and Omissions
- NASD Registration
- Policies/Quotes
- Activities
- Notes
- Service Requests

Adding New Partners

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes the process of adding new partners.

In Siebel PRM, individuals can register at the Siebel Partner Portal and can automatically become individual partners. Self-registered partners would probably not be used in the insurance industry.

In Siebel PRM, companies typically apply to become partners by registering at the Siebel Partner Portal. When they register, they enter information that is stored in a Prospective Partner record. When the brand owner approves them, the Prospective Partner record is converted to a Partner record.

This model of partner registration can be used in the insurance industry and is supported by Siebel Agent Portal. However, in the insurance industry, it is more common to recruit partners in other ways.

If a new partner registers online, then you should add the partner using the process described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

If a new partner is recruited in some other way, you should modify the process of adding a partner as described below.

In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply if the partner did not register on line, and they should be replaced by the following:

- **Recruit new partners.** Recruit partners in the same ways that you have in the past, without using Siebel Agent Portal.
- **Add a Partner record.** Add a record for the new partner directly in the Partner Administration screen, in the Approved Partner view, or import the partner record using EIM.

After the first two steps, the rest of the process of adding a new partner in Siebel Agent Portal is similar to Siebel Partner Portal.

For information about adding a new Partner record directly, see the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

To add a new partner, if the partner did not register online:

- Begin by adding a Partner record directly in the Approved Partner view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.
- Then click Register to create the partner organization. This is similar to the process described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you can choose a parent organization for the new partner, rather than just being able to choose a parent division.
- After registering, you continue the process of assigning responsibilities, positions, and master data to the partner company, and of adding user assignments at the partner company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

Sharing Data with Partners

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share transactional data such as opportunities, service requests, and contacts. In addition to the types of transactional data described here, Siebel Agent Portal supports the following types of transactional data:

- Call Reports
- Claims
- Policies
- Households

Viewing a Partner's Call Reports

Call Reports are records of meetings and conversations with clients or other organizations and individuals. Your agents may create call reports when they meet with customers.

For more information about call reports, see *Siebel Insurance Guide* or *Siebel Healthcare Guide*.

To view all call reports

- 1 Navigate to the Call Reports screen.
- 2 From the Show drop-down list, choose All Call Reports.

Assigning Claims to a Partner

Claims management is a key part of an insurance carrier's dealings with its customers. Siebel Agent Portal allows your partner agencies to capture notice-of-loss information, to view claim information and activities, and to link claims to customer and policy information in similar ways as your employees would using Siebel eInsurance.

Your call center can enter claims from customers. You can use call center to assign the claims to agents at partner companies and you can refer them to partner agencies, whose agents would contact the customers.

Agents, call center representatives, and mobile claims adjusters from your partner agencies can use Siebel Agent Portal to work directly with your customers, and you can use the Partner Manager to view the information they have entered.

You can assign claims to partner agents just as you would assign claims to your own employees—either manually or using Siebel Assignment Manager to create rules that will automatically assign claims to partner agents. You can use Siebel Assignment manager to set up rules for assigning opportunities based on territory, availability, and many other factors.

For more information about claims, see *Siebel Insurance Guide*.

For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

To assign claims to a partner employee manually

- 1 Navigate to the Claims screen.
- 2 From the Show drop-down list, choose All Claims.
- 3 In the Claims list, select the claim you want to assign to the partner.
- 4 In the More Info form, click the select button for the Team Field.
The Sales Team Members dialog box appears.
- 5 In the Sales Team Members dialog box, click New to add a new record to the list.
- 6 Select the partner employee you want to assign the opportunity, and click OK.

7 Click OK.

The partner employee is added to the Team list. This partner employee can now view this claim in the My Claims view of Agent Portal.

Compensation Plans for Agents

You can create compensation plans for your agents, brokers, or partners in the same way that you create incentive compensation plans for your own employees, using the Incentive Compensation Administration screen of your Siebel application.

Partners can view their compensation using the Compensation screen of the Agent Portal.

Viewing a Partner's Policies and Quotes

When agents at your partner companies sell policies to customers, they can enter the information about quotes and policies using Siebel Agent Portal.

You can use the Siebel eInsurance Partner Manager to view this information, including quotes to customers and policies sold to customers.

Partner agents enter quotes for group policies in the Group Policies screen of Siebel Agent Portal, and when these quotes are purchased, they are converted to policies. This is similar to the way that your own employees enter quotes and group policies in Siebel eInsurance or Siebel eHealthcare. You can view these policies in the Group Policies screen of the Partner Manager.

NOTE: The Group Policies must be licensed separately from the Partner Manager.

Partner agents enter quotes for all types of personal policies in the Personal Policies screen of Siebel Agent Portal. This is done by using the Type field to specify the type of policy, and when these quotes are purchased, they are converted to policies. Depending on what type of policy they specified, you can view personal policies in the Auto Policies screen, Individual Health Policies screen, PUL Policies screen, Property Policies screen, or Life and Annuity screen of the Partner Manager.

You can also view all of a partner company's policies, regardless of type, by using the Partner Operations screen. Policies are listed in this screen only if the partner organization is the organization of the policy.

You can also view all of an individual agent's policies by using the Agents screen. This is particularly important when you are working with independent agents, who are not part of a partner company.

For more information about policies, see *Siebel Insurance Guide*.

NOTE: The procedure that follows uses the example of auto policies. To view other types of policies for a partner company, use a similar procedure but begin by navigating to the Group Policies screen, Individual Health Policies screen, PUL Policies screen, Property Policies screen, or Life and Annuity screen instead of navigating to the Auto Policies screen.

To view a partner company's auto policies and quotes

- 1 Navigate to the Auto Policies screen.
- 2 From the Show drop-down list, choose All Policies/Quotes across Organizations.
- 3 Click the Query button.
A query form appears.
- 4 In the More Info form, click the More icon.
- 5 In the More Info form, in the Organization field, click the Select icon.
The Pick Organization dialog box appears.
- 6 In the Pick Organization dialog box, select the Organization of the partner company and click OK.
- 7 In the Policies/Quotes list, click Go to run the query.
All of the partner companies auto policies and quotes appear.

To view all of a partner company's policies and quotes

- 1 Navigate to the Partner Operations screen.
- 2 In the Partners list, select the company whose policies you want to view.
- 3 Click the Policies view tab.
All of that company's policies and quotes appear.

To view all of an agent's policies and quotes

- 1 Navigate to the Agents screen.
- 2 In the Agents list, select the agent whose policies you want to view.
- 3 Click the Policies/Quotes view tab.
All of that agent's policies and quotes appear.

Assigning Households to an Agent

It is useful for agents to know if they have sold multiple policies to members of the same household, because it gives them information about customers background that they can use in future marketing and cross selling.

After adding Households records, you associate them with contact records. Each customer is represented by one contact record. By associating a household record with the contact records of all the people in that household, you allow an agent who is working with one of those contacts to display information about all the other people in that customer's family and the policies that agent has sold them.

NOTE: Households are assigned independently of contacts. When you assign an agent to a household, it does *not* assign the contacts of that household to that agent.

To assign a household to an agent

- 1 Navigate to the All Households view.
- 2 In the Households list, in the record for the household you want to assign to the agent, click the select button of the Team field.
The Household Team Members dialog box appears.
- 3 In the Household Team Members dialog box, click New to add a new record.
An employees list appears.
- 4 Select the agent employee you want to assign the household, and click OK.
You can also select multiple employees and click OK to add them to the access list.
- 5 In the Household Team Members dialog box, click Close.
The household is visible to these agent employees in the My Households view.

For more information about households, see *Siebel Insurance Guide*.

Managing Sales, Service, and Marketing

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the brand owner and partner company might use Siebel PRM to manage sales, service, and marketing. The scenarios are meant to illustrate many possible uses of Siebel PRM.

Many of these scenarios do not apply to the insurance industry. Siebel Agent Portal is typically used in the following ways to manage sales, service, and marketing:

- **Sales.** Typically, insurance carriers share opportunities (leads), accounts, and contacts with Partners. Partners work on assigned opportunities and enter information about them. Insurance carriers are able to view this information to see what progress the partner is making on the opportunity.
- **Service.** Insurance carriers assign service requests to partners. Partners resolve these service requests for the customer on behalf of the insurance carrier and enter information about them. Insurance carriers are able to view this information to track partners' work on service requests.
- **Marketing.** Both the scenario for collaborative marketing with your partners and the scenario for marketing to your partners apply to partners in the insurance industry.
- **Partner Commerce.** The scenarios for partners shopping for their customers apply to your partners in the insurance industry. The scenario for partners shopping for themselves does not normally apply to partners in the insurance industry.

Managing Your Partners

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners. Siebel eInsurance Partner Manager includes the features discussed in this chapter, and it also includes:

- [Added Views in the Partner Screen](#)
- [The Added Agents Screen on page 20](#)

Added Views in the Partner Screen

The Partner screen allows you to work with information about partner companies. In addition to the views that the Partner screen has in Siebel Partner Manager, the Partners screen of Siebel eInsurance Partner Manager includes the following views:

- Contracts
- Errors and Omissions
- Licenses and Appointments

Entering Contracts

The agency (partner company) contracts to sell the policies of the insurance carrier for a certain time and for a certain commission on each sale. You can use the Contracts view to enter and track this information.

To enter a new contract

- 1 Navigate to the Partners view.
- 2 In the Partners list, select the record for the Agency whose new contract you want to enter.
- 3 Click the Contracts view tab.

The Contracts view appears, with a list of the agency's past contracts.

- 4 In the Contracts list, click New, and enter the following information in the fields of the new record.

Field	Comment
Contract #	Enter a unique identifying number for the contract.
Company	Click the select button, and select the company on the brand-owner side that the partner has contracted with.
Start Date	Enter the date when the contract goes into effect.
End Date	Enter the date when the contract expires.
Commission Schedule	Use the drop-down pick list to select the commission schedule.
Contract Status	Use the pick list to select the contract status. Typical statuses might be pending, approved, and current.
Termination Date	If the contract is terminated before the end date, enter the termination date.

Field	Comment
Termination Reason	If the contract is terminated before the end date, use the picklist to select the reason for termination. Typical reasons might be fraud, and no production.
Line of Business	Optionally, click the select button and choose the agency's line of business.

Entering Errors and Omissions Insurance Information

When agents and agencies work with an insurance carrier, they are required to have their own insurance coverage for any liability they may incur as a result of malpractice. This insurance is called Errors and Omissions insurance and is meant to protect the insurance carrier from the risk of working with partners.

Errors and Omissions insurance is generally issued by another insurance company. The agency provides information about its Errors and Omissions insurance to the insurance carrier when it starts to sell for them. The insurance carrier uses the Errors and Omissions view of the partner screen to track this information.

To enter errors and omissions insurance information

- 1 Navigate to the Partners view.
- 2 In the Partners list, select the record for the Agency whose errors and omissions insurance information you want to enter.
- 3 Click the Errors and Omissions view tab.
- 4 In the Errors and Omissions list, click New, and enter the following information in the fields of the new record.

Field	Comment
Errors and Omissions	Enter a unique identifying number for the error and omissions insurance record.
Coverage Start Date	Enter the date when the coverage goes into effect.
Coverage End Date	Enter the date when the coverage expires.
Carrier	Click the select button and select the insurance carrier that provides the errors and omissions insurance.

Entering Licenses and Appointments

Brokerage companies and their brokers are required to have licenses issued by the National Association of Securities Dealers (NASD) for their brokerage activities in each state and in each product line. The insurance carrier appoints the agency or the agent to sell specific product lines they are licensed for in states where they are licensed to sell.

The insurance carrier can use the Licenses and Appointments screen to track this information and to make sure they appoint agencies that are properly licensed to sell specific products in specific locations.

For example, an agency may have the licenses from NASD for automobile insurance and for the states of New York, New Jersey, and Connecticut. The insurance carrier might appoint this agency to sell automobile insurance in New York state. The licenses and appointment view will show the information about both the agency's licences and its appointments.

To enter licenses and appointments

- 1 Navigate to the Partners view.
- 2 In the Partners list, select the record for the Agency whose license and appointment information you want to enter.
- 3 Click the Licenses and Appointments view tab.
- 4 In the Licenses and Appointments list, click New, and enter the following information in the fields of the new record.

Field	Comment
State	Select the state that the license applies to.
License Number	Enter the license number.
License Start Date	Enter the date when the license goes into effect.
License End Date	Enter the date when the license expires.
License Status	Use the pick list to select the license status. Typical statuses might be pending, approved, and current.
Resident	Select Y or N to specify whether the agency is a resident of the state this license applies to.
Line of Business	Click the select button and choose the line of business that this license applies to. Typical examples might be Life Insurance, Health Insurance, and Automobile Insurance.
Appointments	Click the select button and select the company that has the appointment.

The Added Agents Screen

In addition to the Partners screen, which lets you work with information about partner companies, Siebel eInsurance Partner Manager has an Agents screen, which lets you work with information about partner employees.

Some of the screen's views are used to enter and track new information about agents. Other views are used to display information about agents that was entered in other screens.

The Agents screen includes the following views:

- **Contracts.** Allows you to enter information about your contracts with the agent and to view this information.
- **Licenses and Appointments.** Allows you to enter information about whether the agent's license is valid and to view this information.
- **Errors and Omissions.** Allows you to enter information about the errors and omissions insurance of that agent.
- **NASD Registration.** Allows you to enter information about the agent's NASD registration status and to view this information.
- **Policies/Quotes.** Allows you view information about the agent's policies and quotes. Agents enter this information in the Group Policies and Personal Policies screen of the Agent Portal, and you can view it here.
- **Activities.** Allows you to enter and track information about activities you will perform with the agent, such as planned meetings or phone calls. You can enter new activities in this view. The view also displays activities for the agent that were entered in other screens.
- **Notes.** Allows you to enter free-form notes about the agent and to view this information.
- **Service Requests.** Allows you to enter and track information about the agent's service requests. You can enter new service requests in this view. The view also displays activities for the agent that were entered in the Service screen.

3

Siebel PRM for Finance

Siebel PRM for Finance can be used by financial institutions such as retail banks, commercial banks, investment banks, and asset management companies, working with partners such as mortgage lenders, independent financial advisors, and third-party service providers.

Siebel PRM for Finance allows you to work with partners as efficiently as you work with employees of your own company.

- To set up Siebel PRM, you, as the financial institution, go through the process of enrolling partner companies. The financial institution can add these companies' employees or can assign this task to a delegated administrator at each company.
- Then, the financial institution can share opportunities, service requests, and other business information with partner employees as you do with your own employees.
 - The financial institution's employees work with this information using the Partner Manager, which lets them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Partner Portal.
- The financial institution can also use Siebel Partner Manager to:
 - Send alerts, 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, manage market development funds, and analyze performance.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM](#)
- [Differences in the Partner Portal and Partner Manager on page 24](#)
- [Adding New Partners on page 25](#)
- [Sharing Data with Partners on page 27](#)
- [Managing Sales, Service, and Marketing on page 28](#)
- [Managing Your Partners on page 28](#)

Overview of Differences from Siebel PRM

This document covers only features of Siebel PRM for Finance that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

The most important differences are:

- **Terminology.** There is a difference in terminology in Siebel PRM for Finance:
 - *Siebel Partner Relationship Management Administration Guide* uses the terms *brand owner* and *partner*. In the financial industry, brand owner refers to the *financial institution*, and partner refers to the *partner*.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel PRM, in addition to these books, the reader should see *Siebel Finance Guide*.
- **Partner Manager.** The Siebel eFinance Partner Manager is used to work with Siebel PRM for Finance.
- **Added screens.** In addition to the screens in Siebel PRM, Siebel PRM for Financial Services has added screens with information specific to the finance industry. The added screens are:
 - Call Reports
 - Households
- **Added views.** Siebel PRM for Financial Services also has the following added views with information specific to the finance industry:
 - **Profile.** Both Contacts and Accounts screen have a new Profile view which provides more details about the contact or account selected.
- **Scenarios.** Many of the business scenarios described in *Siebel Partner Relationship Management Administration Guide* do not apply to the finance industry.

The differences in terminology and cross-references described above apply to the entire *Siebel Partner Relationship Management Administration Guide*.

The rest of this chapter details the other differences described above, as they apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of the Siebel Partner Portal and the PRM-specific screens of the Siebel Partner Manager. There are a number of differences in the Partner Portal and Partner Manager for Siebel PRM for Finance.

Siebel Partner Portal

In addition to the screens of the Siebel Partner Portal, Siebel PRM for Finance partner portal has the following screens:

- **Call Reports.** Allows your partners to enter call reports when they meet with customers. You can view these call reports using the Siebel eFinance Partner Manager or Siebel eFinance.
- **Households.** Allows your partners to view the members associated with a Household and related opportunities and service requests.

To view information entered in the Profile view of the Contacts screen in the Partner Portal, you use several views of the Contacts screen of the Partner Manager or of Siebel eFinance. To view information entered in the Profile view of the Accounts screen, you use several views of the Accounts screen.

[Table 1](#) shows which views you use to view information entered in the contact and partner profiles of the Partner Portal.

Table 1. Partner Portal Profile Views Mapped to Partner Manager Views

Partner Portal View	Partner Portal Applet	Related Partner Manager and Siebel eFinance View
Contacts > Profile	Default applet	Contacts > Consumer Profile > Personal
Contacts > Profile	Income Source	Contacts > Consumer Profile > Financial
Contacts > Profile	Employment	Contacts > Consumer Profile > Financial
Accounts > Profile	Default applet	Accounts > Profile
Accounts > Profile	Financial Profile	Accounts > Profile > Financial
Accounts > Profile	Management	Accounts > Profile > Management

Siebel eFinance Partner Manager

The Siebel eFinance Partner Manager has the same functionality as the Siebel eInsurance Partner Manager. For information about this functionality, see [“Siebel eInsurance Partner Manager” on page 11](#).

The Partner Manager can be configured using Siebel Tools to remove screens that are not needed with Siebel PRM for Finance Portal. For more information about Siebel Tools, see *Siebel Tools Reference*.

Adding New Partners

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes a process of adding new partners.

In Siebel PRM, individuals and companies typically apply to become partners by registering at the Siebel Partner Portal. When they register, they enter information that is stored in a Prospective Partner record. When the financial institution approves them, the Prospective Partner record is converted to a Partner record.

In the financial industry, depending on your business model, you may or may not want to allow individuals or companies to apply online to become your partners.

If you allow potential partners to apply online, follow the process of adding new partners that is described in *Siebel Partner Relationship Management Administration Guide*.

If you do not allow potential partners to apply online, the section about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to you.

In addition, if you do not allow potential partners to apply online, you will use a different process to add new partners than the process described in *Siebel Partner Relationship Management Administration Guide*. In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

If you do not allow potential partners to apply online, these two steps should be replaced by the following:

- **Recruit new partners.** Recruit partners in the same ways that you have in the past, without using Siebel PRM.
- **Add a Partner record.** Add a record for the new partner directly in the Partner Administration screen, in the Approved Partner view, or import the partner record using EIM.

After the first two steps, the rest of the process of adding a new partner or partner is similar to Siebel PRM.

For information about adding a new Partner record directly, see the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

If you do not allow partners to apply online, you add a new partner as follows:

- Begin by adding a Partner record directly in the Approved Partner view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.
- Then click Register to create the partner organization. This is similar to the process described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*, except that you can choose a parent organization for the new partner, rather than just being able to choose a parent division.
- After registering, you continue the process of assigning responsibilities, positions, and master data to the partner company and of adding user assignments at the partner company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

NOTE: When you add a record in the Approved Partner view, you have not yet created the partner company. You have just added an Account record with Partner in the Partner Type field. You create the partner company when you click Register, creating an Organization record representing the partner in addition to the Account record.

Sharing Data with Partners

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share transactional data such as opportunities, service requests, and contacts. In addition to the types of transactional data described here, Siebel PRM for Finance supports the following type of transactional data:

- Call Reports

Viewing a Partner's Call Reports

Call Reports are records of meetings and conversations with clients or other organizations and individuals. Financial institutions often require employees to generate call reports when they meet with customers. Call reports are used for the following purposes:

- To allow a new relationship manager to become knowledgeable about the client and its history with the financial institution. Relationship managers prepare for their first meeting with clients by reviewing past call reports.
- To allow senior managers and product specialists associated with a certain client to monitor developments in the client relationship, even though they may not meet with the client on a regular basis.
- To provide a record of important informal agreements. In the event that a failed financing transaction results in legal proceedings, these reports are an important component of the legal process.
- To provide evidence in the commercial banking industry that the banker is monitoring the risk of the credit on a regular basis.

Because the partner portal user may be in an organization different from that of the employee application user, the latter must have visibility into Call Reports created within the other organization.

For more information about call reports, see *Siebel Finance Guide*.

NOTE: While the Partner Portal includes a Call Reports screen, the Partner Manager does not. The financial institution must purchase the Call Reports module separately to view Call Reports.

To view all call reports

- 1 Navigate to the Call Reports screen.
- 2 From the Show drop-down list, choose All Call Reports.

Managing Sales, Service, and Marketing

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the financial institution and partner company might use Siebel PRM to manage sales, service, and marketing. The scenarios are meant to illustrate many possible uses of Siebel PRM.

Many of these scenarios do not apply to the financial industry. Siebel PRM is typically used in the following ways to manage sales, service, and marketing:

- **Sales.** Typically, financial institutions share opportunities (leads), companies, and contacts with Partners. Partners work on assigned opportunities and enter information about them. Financial institutions are able to view this information to see what progress the partner is making on the opportunity.
- **Service.** Financial institutions assign service requests to partners. Partners resolve these service requests for the customer on behalf of the financial institution and enter information about them. Financial institutions are able to view this information to track partners' work on service requests.
- **Marketing.** Both the scenario for collaborative marketing with your partners and the scenario for marketing to your partners apply to partners in the financial industry.
- **Partner Commerce.** The scenarios for partners shopping for their customers apply to your partners in the finance industry. The scenario for partners shopping for themselves does not normally apply to partners in the finance industry.

Managing Your Partners

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners. There are a several differences in Siebel PRM for Financial Services, because it uses the Siebel eFinance Partner Manager.

Siebel eFinance Partner Manager has the same functionality as the Siebel eInsurance Partner Manager. For more information, see [Chapter 2, "Siebel Agent Portal."](#)

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Siebel Healthcare Provider Portal

Siebel Healthcare Provider Portal allows health insurance carriers to share information with healthcare providers through the Web. It allows providers to view claim status, check member eligibility status, and work with referrals and authorizations.

- To set up Siebel Healthcare Provider Portal, you, as the health insurance carrier, go through the process of enrolling provider organizations. The health insurance carrier can add these providers' employees or can assign this task to a delegated administrator at each organization.
- Then, the health insurance carrier can share claims, service requests, and other business information with their providers as they do with their own employees.
 - The health insurance carrier's employees work with this information using the Partner Manager, which lets them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Healthcare Provider Portal.
- The health insurance carrier can also use Partner Manager to:
 - Send alerts, announcements, and Web messages to partners.
 - Share literature and solutions to frequently asked questions with healthcare providers.
 - View and respond to self-service requests that healthcare providers enter through the Healthcare Provider Portal.
 - View information about healthcare providers that they enter in the Profile screen of the Healthcare Provider Portal.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM on page 29](#)
- [Differences in the Partner Portal and Partner Manager](#)
- [Adding New Partners](#)
- [Sharing Data with Partners](#)
- [Managing Sales, Service and Marketing](#)
- [Managing Your Partners](#)

Overview of Differences from Siebel PRM

This document covers only features of Siebel Healthcare Provider Portal that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

Differences that apply to the entire book are:

- **Terminology.** There is a difference in terminology for Siebel Healthcare Provider Portal:
 - *Siebel Partner Relationship Management Administration Guide* uses the terms *brand owner* and *partner*. For the Healthcare Provider Portal, *brand owner* refers to the *health insurance carrier*, and *partner* refers to the *healthcare provider*.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel Healthcare Provider Portal, in addition to these books, the reader should see *Siebel Healthcare Guide*.

The differences in terminology and cross-references described above apply to the entire *Siebel Partner Relationship Management Administration Guide*.

The rest of this chapter details differences that apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of the Siebel Partner Portal and the PRM-specific screens of the Siebel Partner Manager. There are a number of differences in the Healthcare Provider Portal and Partner Manager.

Siebel Healthcare Provider Portal

Screens of the Siebel Partner Portal that are not relevant to your work with healthcare providers are removed from the Healthcare Provider Portal. In addition to the screens in Siebel Partner Portal, Siebel Healthcare Provider Portal has added screens with information specific to the insurance industry.

The screens available in the Healthcare Provider Portal are:

- **Home Page.** Includes a personalized salutation, the My News applet, which displays and allows the user to search for news items, the My Tasks applet, which displays links to common tasks for the user's role, and the Partner Alerts, which displays alerts that you have made available to this partner.
- **Claims.** Allows healthcare provider organizations to view claims that you have shared with them.
- **Facilities.** Allows healthcare provider organizations to enter information about their facilities, which you can view.
- **Info Center.** Allows healthcare provider organizations to view literature that you have shared with them.
- **Members.** Allows healthcare provider organizations to view information about members that you have shared with them and to check these members' eligibility.
- **Partner Locator.** Allows healthcare provider organizations to perform searches to find other partners that you have published to the Partner Locator.

- **Profile.** Allows healthcare provider organizations to enter and maintain information about themselves, which you can view in the Partners screen.
- **Providers.** Allows healthcare provider organizations to enter information about their healthcare professionals, which you can view.
- **Referrals/Authorizations.** Allows healthcare provider organizations to view and enter referral and authorization requests.
- **Self-Service Requests.** Allows healthcare provider organizations to enter service requests on their own behalf.
- **Solutions.** Allows healthcare provider organizations to view solutions to frequently asked questions.

Siebel eHealthcare Partner Manager

The Siebel eHealthcare Partner Manager, which is used with Siebel Healthcare Provider Portal, has the same functionality as the Siebel eInsurance Partner Manager, which is described in [“Siebel eInsurance Partner Manager” on page 11](#).

You can use responsibilities to hide screens and views in the Partner Manager that are not needed with the Healthcare Provider Portal. For more information about responsibilities, see *Siebel Security Guide*.

Adding New Partners

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes the process of adding new partners.

In Siebel PRM, companies typically apply to become partners by registering at the Siebel Partner Portal. The information that they enter when they register is stored in a Prospective Partner record. When the brand owner approves them, the Prospective Partner record is converted to a Partner record.

This model of partner registration does not apply to Healthcare Provider Portal. Healthcare providers would not apply online to become part of a network or medical group. They would be recruited, contracted, and credentialed before using the Healthcare Provider portal.

For this reason, the section about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to Siebel Healthcare Provider Portal.

In addition, the process of adding new partners in the Healthcare Provider Portal is different from the process of adding new partners in Siebel PRM. In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply to Siebel Healthcare Provider Portal, and they should be replaced by the following:

- **Recruit new partners.** Recruit partners in the same ways that you have in the past, without using Siebel Healthcare Provider Portal.
- **Add a Partner record.** Add a record for the new partner directly in the Partner Administration screen, in the Approved Partner view, or import the partner record using EIM.

After the first two steps, the rest of the process of adding a new partner in Siebel Healthcare Provider Portal is similar to Siebel PRM.

For information about adding a new Partner record directly, see the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

To add a new partner:

- Begin by adding a Partner record directly in the Approved Partner view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.
- Then click Register to create the partner organization and continue the process of assigning responsibilities, positions, and master data to the partner company and of adding user assignments at the partner company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

Sharing Data with Partners

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share data such as opportunities, contacts, and literature.

Many types of data described in this chapter do not apply to your work with healthcare providers. You can only share the types of data that can be viewed in the screens of the Healthcare Provider Portal, which are listed in [“Siebel Healthcare Provider Portal” on page 30](#).

In addition to the types of transactional data described in this chapter, Siebel Healthcare Provider Portal supports the following types of transactional data:

- Claims
- Facilities
- Members
- Providers
- Referrals/Authorizations

NOTE: Accounts and Opportunities are included in Siebel Healthcare Provider Portal, but they would not be used the same way as they are in Siebel PRM. Most carriers would not use these screens.

Sharing Claims with Healthcare Providers

If you share a Claim record with a healthcare provider, the provider can view it through the Siebel Healthcare Provider Portal but cannot modify it.

You share claims with healthcare providers by assigning them to provider employees. It is visible to that employee in the My Claims view.

You can assign claims to providers manually, or if your business model is appropriate, you can set up Siebel Business Process Designer or Siebel Assignment Manager to assign claims to partners automatically.

For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide*.

For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

For more information about claims, see *Siebel Healthcare Guide*.

To assign a claim to a healthcare provider employee manually

- 1 Navigate to the Claims screen.
- 2 In the Claims list, select the claim you want to assign to the provider.
- 3 In the More Info form, in the Team field, click the select icon.
The Sales Team Members dialog box appears.
- 4 In the Sales Team Members dialog box, click New.
- 5 In the Sales Team Members list, select the provider you want to assign the claim to, and click OK.
- 6 In the Sales Team Members dialog box, click OK.

The provider you selected can view the claim in the My Claims view of the Provider Portal.

Viewing Information About Healthcare Facilities

Facilities are healthcare organizations that are paid by or file claims with your health plan or health insurance company. Examples of facilities are hospitals, clinics, and pharmacies. Facilities are also referred to as provider organizations.

In some cases, users at the insurance company enter information about facilities and about the providers and contacts, payments, and claims associated with a facility.

However, if your provider organizations use the Healthcare Provider Portal, they can enter this information themselves. They simply navigate to the Facilities screen of the Healthcare Provider Portal and use the Facilities list, More Info form, and Profile form to enter and maintain information about the facility. They can also click the view tabs to enter and maintain information about Claims, Contracts, Payments, Locations, HMO Members, and other information associated with the facility.

The insurance carrier can view this information using the Siebel Partner Manager or Siebel eHealthcare.

For more information about entering and maintaining information about facilities, see the section about facilities in *Siebel Healthcare Guide*.

To view information about a facility

- 1 Navigate to the Facilities screen.
- 2 In the Facilities list, select the facility that you want to view information about.
- 3 Click the view tabs to display information associated with that facility.

Sharing Members with Healthcare Providers

Members are individuals who are insured by a carrier. In some cases, members are also known as policyholders, subscribers, or insureds.

You can use the Members screen to enter information about members, or employer groups can use the Group Portal to enter information about members. After it has been entered, you can share this information with providers, so they can view the information in the Members screen of the Healthcare Provider Portal:

- You can share member data with an employee at a provider company, and this employee will be able to view the member in the My Members view of the Members screen of the Healthcare Provider Portal.
- You can also share member data with a provider company, and this company will be able to view the member in the All Members view of the Members screen of the Healthcare Provider Portal, but it will not be visible in the My Members view for any employee at the provider company. Someone at the provider company who has access to the All Members view can use the Contact Team field to assign the member to specific employees at the provider company.

For more information about entering and maintaining information about members, see the section about members in *Siebel Healthcare Guide*.

To share information about a member with a provider employee

- 1 Navigate to the Members screen.
- 2 In the Members list, select the member you want to share with a provider.
- 3 In the More Info form, click the Show More button.
- 4 In the More Info form, in the Contact Team field, click the select button.
- 5 In the Coverage Team dialog box, click New.
- 6 In the Add Employees dialog box, select the provider employee you want to share the Member with, and click OK.

- 7 In the Coverage Team dialog box, click OK.

This member will be visible to this provider employee in the My Members view.

To share information about a member with a provider company

- 1 Navigate to the Members screen.
- 2 In the Members list, select the member you want to share with a provider.
- 3 In the More Info form, click the Show More button.
- 4 In the More Info form, in the Organization field, click the select button.
- 5 In the Organizations dialog box, click New.
- 6 In the Add Organizations dialog box, select the Organization for the provider you want to share the Member with, and click OK.
- 7 In the Organizations dialog box, click OK.

This member will be visible to this provider organization in the All Members view.

Viewing Information about Healthcare Providers

The Providers screen allows insurance carriers to view and manage information about healthcare providers. Providers are healthcare professionals who are paid by, or file claims with, your health plan or health insurance company. Examples of providers are physicians, nurse practitioners, dentists, and pharmacists.

For more information about using the Providers screen, see the section about providers in *Siebel Healthcare Guide*.

Rather than the carrier entering this information, the provider company can enter and maintain information about provider employees using the Providers screen of the Provider Portal. Then the insurance carrier can view this information using the Siebel Partner Manager or Siebel eHealthcare.

To view information about a provider

- 1 Navigate to the Providers screen.
- 2 In the Providers list, select the provider that you want to view information about.
- 3 Click the view tabs to display information associated with that provider.

Sharing Referrals/Authorizations with Healthcare Providers

The Referrals/Authorizations screen allows healthcare providers to enter requests for referrals to other healthcare professionals and to authorize treatments, and it allows the insurance carrier to respond to these requests.

The provider enters the request in the Healthcare Provider Portal by navigating to the Referrals/Authorizations screen, creating a new request, and entering information about it. When a new request is created, it has the status of Open.

The insurance carrier can act on the request by using the Siebel Partner Manager or Siebel eHealthcare to change the Substatus to Approved, Declined or some other substatus (such as Additional Documents Required or Supervisor Approval).

The provider can see whether the request has been approved by looking at the value of the Substatus field.

For more information about the Referrals/Authorization screen, see *Siebel Healthcare Guide*.

To approve or decline a referral request or authorization request

- 1 Navigate to the Referrals/Authorizations screen.
- 2 In the Referrals/Authorizations list, select the referral request or authorization request that you want to act on.
- 3 Click the view tabs to display more information about the referral request or authorization request, such as notes that the provider wrote or attachments that the provider associated with it.
- 4 In the Substatus field, choose Approved, Declined, or some other substatus if necessary.

The provider will be able to view the substatus in the Healthcare Provider Portal.

Managing Sales, Service and Marketing

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the health insurance carrier and partner company might use Siebel PRM to manage sales, service, marketing, and partner commerce. The scenarios are meant to illustrate many possible uses of Siebel PRM.

Most of these scenarios do not apply to the Healthcare Provider Portal:

- **Sales.** The chapter of sales scenarios does not apply to the Healthcare Provider Portal.
- **Service.** In the typical scenario for service requests:
 - The provider logs a service request using the Self-Service screen of the Healthcare Provider Portal. Providers can do this to ask for information about member eligibility, benefits, or payments or to make other service requests.
 - The provider can also use the Self-Service screen to log a service request on behalf of a member.
 - The carrier views these service requests and responds to them using the Service screen of the Partner Manager.
 - The provider views the response using the Self-Service screen of the Healthcare Provider Portal.
- **Marketing.** The chapter of marketing scenarios does not apply to the Healthcare Provider Portal.

- **Partner Commerce.** The chapter of scenarios for partner commerce does not apply to the Healthcare Provider Portal.

Managing Your Partners

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners. Some of these are not relevant to your work with the Healthcare Provider Portal. The feature that would commonly be used with the Healthcare Provider Portal is:

- Partner Alerts

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Siebel Service Provider Portal

Siebel Service Provider Portal allows insurance carriers to share information with service providers through the Web. It allows the carrier to assign a claim element to the service providers, both for internal reporting purposes and to allow the partner to view the claim element. For example, a carrier who provides automobile insurance can make information about customers' claims visible to service providers who repair cars.

- To set up Siebel Service Provider Portal, you, as the insurance carrier, go through the process of enrolling provider organizations. The insurance carrier can add these providers' employees or can assign this task to a delegated administrator at each organization.
- Then, the insurance carrier can share claims and other business information with their provider employees as you do with your own employees.
 - The insurance carrier's employees work with this information using the Partner Manager, which lets them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Service Provider Portal.
- The insurance carrier can also use Partner Manager to:
 - Send alerts, announcements, and Web messages to service providers.
 - Share information about contacts (customers) with service providers. The service provider can only see information about the contact's address, policies, and claims.
 - Share literature and solutions to frequently asked questions with service providers.
 - View and respond to self-service requests that service providers enter through the Service Provider Portal.
 - View information about service providers that they enter in the Profile screen of the Service Provider Portal.

This chapter includes the following topics:

- [Differences from Siebel PRM on page 40](#)
- [Differences in the Partner Portal and Partner Manager on page 40](#)
- [Adding New Partners on page 41](#)
- [Sharing Data with Partners on page 42](#)
- [Managing Sales, Service and Marketing on page 43](#)
- [Managing Your Partners on page 44](#)
- [Sections that Do Not Apply on page 44](#)

Differences from Siebel PRM

This document covers only features of Siebel Service Provider Portal that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

Differences that apply to the entire book are:

- **Terminology.** There are a few differences in terminology for Siebel Service Provider Portal:
 - *Siebel Partner Relationship Management Administration Guide* uses the terms *brand owner* and *partner*. For the Service Provider Portal, brand owner refers to the *insurance carrier*, and partner refers to the *service provider*.
 - *Siebel Partner Relationship Management Administration Guide* uses the term *account* to refer to the transactional data that the user can display in the Accounts screen. In Siebel Service Provider Portal, this is called a *company* and it is displayed in the Companies screen.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel Service Provider Portal, in addition to these books, the reader should see *Siebel Insurance Guide*.

The differences in terminology and cross-references described above apply to the entire *Siebel Partner Relationship Management Administration Guide*.

The rest of this chapter details differences that apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of the Siebel Partner Portal and the PRM-specific screens of the Siebel Partner Manager. There are a number of differences in the Service Provider Portal and Partner Manager.

Siebel Service Provider Portal

Screens of the Siebel Partner Portal that are not relevant to your work with service providers are removed from the Service Provider Portal. In addition to the screens in Siebel Partner Portal, Siebel Service Provider Portal has added screens with information specific to the insurance industry.

The screens available in the Service Provider Portal are:

- **Home Page.** Includes a personalized salutation, the My News applet, which displays and allows the user to search for news items, the My Tasks applet, which displays links to common tasks for the user's role, and the Partner Alerts, which displays alerts that you have made available to this partner.
- **Claims and Claim Element.** Allows service providers to view claims and claim elements that you have shared with them.

- **Contacts.** Allows service providers to view information about customers that you have shared with them, but only displays limited information such as the customer's address, policies, and claims.
- **Info Center.** Allows service providers to view literature that you have shared with them
- **Partner Locator.** Allows service providers to perform searches to find other partners that you have published to the Partner Locator.
- **Profile.** Allows service providers to enter and maintain information about themselves, which you can view in the Partners screen.
- **Self-Service Requests.** Allows service providers to enter service requests on their own behalf.
- **Solutions.** Allows service providers to view solutions to frequently asked questions.

Siebel eInsurance Partner Manager

The Siebel eInsurance Partner Manager, which is used with Siebel Service Provider Portal, is described in ["Siebel eInsurance Partner Manager" on page 11](#).

The Partner Manager can be configured using Siebel Tools to remove screens that are not needed with the Service Provider Portal. For more information about Siebel Tools, see *Using Siebel Tools*.

Adding New Partners

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes the process of adding new partners.

In Siebel PRM, companies typically apply to become partners by registering at the Siebel Partner Portal. The information that they enter when they register is stored in a Prospective Partner record. When the brand owner approves them, the Prospective Partner record is converted to a Partner record.

This model of partner registration does not apply to Service Provider Portal. Service providers generally would not apply online to become part of a network of service providers used by an insurance company. They would be recruited before they use the Service Provider portal.

For this reason, the section about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to Siebel PRM.

In addition, the process of adding new partners in Siebel Service Provider Portal is different from the process of adding new partners in Siebel PRM. In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply to Siebel Service Provider Portal, and they should be replaced by the following:

- **Recruit new partners.** Recruit partners in the same ways that you have in the past, without using Siebel Service Provider Portal.
- **Add a Partner record.** Add a record for the new partner directly in the Partner Administration screen, in the Approved Partner view, or import the partner record using EIM.

After the first two steps, the rest of the process of adding a new partner in Siebel Service Provider Portal is similar to Siebel PRM.

For information about adding a new Partner record directly, see the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

To add a new partner:

- Begin by adding a Partner record directly in the Approved Partner view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.
- Then click Register to create the partner organization and continue the process of assigning responsibilities, positions, and master data to the partner company and of adding user assignments at the partner company, as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

Sharing Data with Partners

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share data such as opportunities, contacts, and literature.

Many types of data described in this chapter do not apply to your work with service providers. You can only share the types of data that can be viewed in the screens of the Service Provider Portal, which are listed in ["Siebel Service Provider Portal" on page 40](#).

In addition to the types of transactional data described in this chapter, Siebel Service Provider Portal supports the following types of transactional data:

- Claims
- Claim Elements

Sharing Claims with Service Providers

If you share a Claim record with a service provider, the provider can view it through the Siebel Service Provider Portal but cannot modify it.

You share claims with service providers by assigning them to provider employees. It is visible to that employee in the My Claims view.

You can assign claims to providers manually, or if your business model is appropriate, you can set up Siebel Business Process Designer or Siebel Assignment Manager to assign claims to partners automatically.

For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide*.

For more information about Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

For more information about claims, see *Siebel Insurance Guide*.

To assign a claim to a service provider employee manually

- 1 Navigate to the Claims screen.
- 2 In the Claims list, select the claim you want to assign to the provider.
- 3 In the More Info form, in the Team field, click the select icon.
The Sales Team Members dialog box appears.
- 4 In the Sales Team Members dialog box, click New.
- 5 In the Sales Team Members list, select the provider you want to assign the claim to, and click OK.
- 6 In the Sales Team Members dialog box, click OK.

The provider you selected can view the claim in the My Claims view of the Provider Portal.

Claim Elements

Many insurance companies break down claims into subcomponents called *claim elements*. By subdividing claims in this way, insurers can delegate the management of these subcomponents to specific groups within their company according to their business rules.

Service providers can view claim elements using the Claim Elements screen of the Service Provider Portal.

For more information about working with claim elements, see *Siebel Insurance Guide*.

Managing Sales, Service and Marketing

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the insurance carrier and partner company might use Siebel PRM to manage sales, service, marketing, and partner commerce. The scenarios are meant to illustrate many possible uses of Siebel PRM.

Most of these scenarios do not apply to the Service Provider Portal:

- **Sales.** The section of sales scenarios does not apply to the Service Provider Portal.
- **Service.** In the typical scenario for service requests:
 - The provider logs a service request using the Self-Service screen of the Service Provider Portal.
 - The provider can also use the Self-Service screen to log a service request on behalf of a customer.

- The carrier views these service requests and responds to them using the Service screen of the Partner Manager.
- The provider views the response using the Self-Service screen of the Service Provider Portal.
- **Marketing.** The chapter of marketing scenarios does not apply to the Service Provider Portal.
- **Partner Commerce.** The chapter of scenarios for partner commerce does not apply to the Service Provider Portal.

Managing Your Partners

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners. In general, these are not relevant to your work with the Service Provider Portal.

Sections that Do Not Apply

A number of chapters of *Siebel Partner Relationship Management Administration Guide* do not apply to your work with service providers and should not be used as documentation for the Service Provider Portal, including the chapters about:

- **Setting Up ASIs.** Describes how to set up the Application Service Interfaces used for shopping cart transfer and opportunity transfer, which do not apply to your work with service providers.
- **CHAMP Planning.** Describes a process of collaborative planning that does not apply to your work with service providers.
- **Market Development Funds.** Describes a process of funding marketing by partners that does not apply to your work with service providers.
- **Reporting on Partner Performance.** Describes reports to analyze partner performance that do not apply to your work with service providers.

6

Siebel Group Portal

Siebel Group Portal allows insurance carriers to work with employer groups through the Web. It allows carriers to designate a delegated administrator at the employer group company, who enters and updates information about group members. It also allows insurance carriers to share information about group policies and other business information with employer groups through the Web.

- To set up Siebel Group Portal, you, as the insurance carrier, go through the process of enrolling partner companies. The insurance carrier creates a delegated administrator at the employer group company who can add other employees at this company as group members.
- Then, the insurance carrier can share members, group policies, and other business information with the employer group company.
 - The insurance carrier's employees work with this information using one of the employee facing applications in Siebel eInsurance or Siebel eHealthcare.
 - Delegated administrators at the employer group view and work with this information using Siebel Group Portal.
- The insurance carrier can also use Partner Manager to send alerts, information about special promotions, and Web messages to partners.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM](#)
- [Differences in the Partner Portal and Partner Manager on page 46](#)
- [Using the Group Administrator Role on page 47](#)
- [Adding New Partners on page 48](#)
- [Sharing Data with Partners on page 49](#)
- [Managing Sales, Service, and Marketing on page 53](#)
- [Managing Your Partners on page 54](#)
- [Sections that Do Not Apply on page 54](#)

Overview of Differences from Siebel PRM

This document covers only features of Siebel Group Portal that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

Differences that apply to the entire book are:

- **Terminology.** There is a difference in terminology in Siebel Group Portal:

- *Siebel Partner Relationship Management Administration Guide* uses the terms *partner company* and *partner employee* throughout the book. In Siebel Group Portal, these refer to the *employer group company* and the *employer group administrator at the employer group company*.
- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel Group Portal, in addition to these books, the reader should see *Siebel Insurance Guide* or *Siebel Healthcare Guide*.

The differences in terminology and cross-references described above apply to the entire *Siebel Partner Relationship Management Administration Guide*.

The rest of this document details differences that apply to specific chapters of *Siebel Partner Relationship Management Administration Guide*.

Differences in the Partner Portal and Partner Manager

The overview chapter of *Siebel Partner Relationship Management Administration Guide* describes the screens of the Siebel Partner Portal and the PRM-specific screens of the Siebel Partner Manager. There are a number of differences in the Partner Portal and Partner Manager for Siebel Group Portal.

Siebel Group Portal

There are differences in the Group Portal home page and in the screens that are available in the Provider Portal.

The Group Portal Home page contains the following applets:

- **Salutation.** Greets the user by name and gives the date.
- **My News.** Displays and allows the user to search for news items.
- **My Tasks.** Displays links to common tasks for the user's role.
- **Partner Alerts.** Displays alerts that you have made available to this partner.

In addition to the screens in Siebel Partner Portal, Siebel Group Portal contains added screen and pages:

- The following added screens are accessible by clicking screen tabs:
 - Group Policies
 - Facilities
 - Members
 - Providers
- The following added pages are accessible as drilldowns from the home page:
 - Health Facility Locator

■ Provider Locator

The Siebel Group Portal does not include screens of the Siebel Partner Portal that are not relevant to the insurance carrier's work with groups, such as the CHAMP screen and the Market Development Fund screen.

Siebel eHealthcare Partner Manager

The Siebel eHealthcare Partner Manager, which is used with Siebel Group Portal, has the same functionality as the Siebel eInsurance Partner Manager, which is described in ["Siebel eInsurance Partner Manager" on page 11](#).

You can use responsibilities to hide screens and views in the Partner Manager that are not needed with the Healthcare Provider Portal. For more information about responsibilities, see *Siebel Security Guide*.

Using the Group Administrator Role

The Group Administrator role is associated with the tasks and views used for group administration, which are shown in [Table 2](#).

Table 2. Tasks and Views Used for Group Administration

Task	View
Administrator Functions	FINS Health eGroup Admin Enroll View (SCW)
Initial Enrollment	FINS Health eGroup Enroll Tasks View (SCW)
Group Maintenance	FINS Health eGroup Member Profile View (SCW)

For the group administrator to access these views:

- These tasks and views must be associated with the Group Administrator role.
- The employee acting as group administrator must be associated with the Group Administrator role.

The Group Administrator role is available and is associated with the proper tasks and views when you install the product.

You must use the User Administration screen to associate the employee who is group administrator with this role.

Then these tasks will be displayed in the My Tasks applet on the group administrator's home page. The group administrator will be able to display these views by clicking on the tasks.

For more information about associating an employee with a role, see *Siebel Security Guide*.

Adding New Partners

The setup chapter of *Siebel Partner Relationship Management Administration Guide* describes the process of adding new partners. There are two important differences when you add new employer group companies as users of the Siebel Group Portal:

- Add partner companies directly rather than recruiting them through the Web.
- Always add a delegated administrator at the partner company.

Add Partner Companies Directly

In Siebel PRM, companies typically apply to become partners by registering at the Siebel Partner Portal. The information that they enter when they register is stored in a Prospective Partner record. When the brand owner approves them, the Prospective Partner record is converted to a Partner record.

This model of partner registration does not apply to Group Portal. Employer groups would be sold group policies in the usual way, before they began to use the Group Portal.

For this reason, the section about Registering Individual Partners in the setup chapter of *Siebel Partner Relationship Management Administration Guide* does not apply to Siebel PRM.

In addition, the process of adding new partners in Siebel Group Portal is different from the process of adding new partners in Siebel PRM. In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the employer group company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply to Siebel Group Portal, and they should be replaced by the following:

- **Sell policies to employer groups.** Sell group policies to employer groups in the same ways that you have in the past, before using Siebel Group Portal.
- **Add a Partner record.** Add a record for the new employee group directly in the Partner Administration screen, in the Approved Partner view, or import the partner record using EIM.

After the first two steps, the rest of the process of adding a new employee group in Siebel Group Portal is similar to the process of adding a partner in Siebel PRM.

For information about adding a new Partner record directly, see the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

To add a new employer group:

- Begin by adding a Partner record directly in the Approved Partner view, using the method described in the section about other ways of adding partner records, at the end of the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

- Then click Register to create the partner organization and continue the process of adding the partner company as described in the setup chapter of *Siebel Partner Relationship Management Administration Guide*.

In the remainder of the process, you should skip the procedure about adding a partner to an access group. Access groups are used to assign master data, and partners using the group portal do not need any master data.

NOTE: When you add a record in the Approved Partner view, you have not yet created the employer group company. You have just added an Account record with Partner in the Partner Type field. You create the employer group company when you click Register, creating an Organization record representing the partner in addition to the Account record.

Add Delegated Administrators

In the setup chapter of *Siebel Partner Relationship Management Administration Guide*, one of the final steps of the process of adding a new partner is to add user assignments at the partner company. In this section, it says you can add the users at the partner company yourself, or you can add a delegated administrator at the partner company who will add other users there.

In Siebel Group Portal, you would always add a delegated administrator at the partner company.

One of the key benefits of Siebel Group Portal is that it lets you add only the employer group administrator at the employer group company. The employer group administrator does the rest of the work of adding and maintaining information about the members at that company. If you prefer, you can add all the users yourself.

Sharing Data with Partners

The sharing data chapter of *Siebel Partner Relationship Management Administration Guide* discusses how to share transactional data and master data with your partners.

This chapter includes examples of typical ways that you might share transactional data such as opportunities, service requests, and contacts. Most of the types of transactional data described in this chapter does not apply to your work with the Siebel Group Portal.

The most important types of data you will share using the Groups Portal are:

- Group Policies
- Facilities
- Members
- Providers

Sharing Group Policies with the Employer Groups

You should always assign the employer group its own policy and no other policies.

When you assign a group policy to the employer group, the employee administrator at the group will be able to view or update information about the policy and its line items and about the following information associated with the policy in the following views:

- Activities
- Census
- Employee Classes
- Plan Design
- Eligible Members
- Enrollment
- Member Beneficiary
- Notes
- Pay Plan
- Bill To
- Service Request
- Pay Plan - Bill To

NOTE: By default, users of the Group Portal can update the data in all of these views. Depending on your business model, you may want to configure the product using Siebel Tools to make some of these views read-only for users of the Group Portal. For example, you may want to make plan design information read-only for Group Portal users. For more information about using Siebel Tools, see *Using Siebel Tools*.

You can assign group policies to employer group administrators manually, or you can set up Siebel Business Process Designer to assign them automatically.

For more information about Siebel Business Process Designer, see *Siebel Business Process Framework: Workflow Guide*.

For more information about group policies, see *Siebel Healthcare Guide* or *Siebel Insurance Guide*.

To assign a group policy to an employer group administrator

- 1 Navigate to the Group Policy screen.
- 2 In the Policies/Quotes list, select the policy you want to assign to the employer group administrator.
- 3 In the More Info form, in the Team field, click the select icon.
The Team Members dialog box appears.
- 4 In the Team Members dialog box, click New.
- 5 In the Team Members list, select the group administrator you want to assign the policy to, and click OK.

- 6 In the Team Members dialog box, click OK.

The employee you selected can view the policy in the My Group Policies view of the Group Portal.

Sharing Information About Facilities

Facilities are healthcare organizations that are paid by, or file claims with, your health plan or health insurance company. Examples of facilities are hospitals, clinics, and pharmacies. Facilities are also referred to as provider organizations.

Users at the insurance company can enter information about facilities, or providers can enter this information themselves using the Provider Portal.

For more information about entering and maintaining information about facilities, see the section about facilities in *Siebel Healthcare Guide*.

After this information has been entered, you can share it with employer groups, so they can view information about the facilities that are available to them using the Facilities screen of the Group Portal:

- You can share a facility with an employee at a group company, and this employee will be able to view it in the My Facilities view of the Facilities screen of the Group Portal.
- You can also share a facility with a group company, and this company will be able to view the member in the All Facilities view of the Facilities screen of the Group Portal, but it will not be visible in the My Facilities view for any employee at the group company. Someone at the group company who has access to the All Facilities view can use the Contact Team field to assign the member to specific employees at the group company.

To share information about a facility with a group employee

- 1 Navigate to the Facilities screen.
- 2 In the Facilities list, select the facility you want to share with a group.
- 3 In the More Info form, click the Show More button.
- 4 In the More Info form, in the Contact Team field, click the select button.
- 5 In the Coverage Team dialog box, click New.
- 6 In the Add Employees dialog box, select the group employee you want to share the Facility with, and click OK.
- 7 In the Coverage Team dialog box, click OK.

This facility will be visible to this group employee in the My Facilities view.

To share information about a facility with a group company

- 1 Navigate to the Facilities screen.
- 2 In the Facilities list, select the facility you want to share with a group.

- 3 In the More Info form, click the Show More button.
- 4 In the More Info form, in the Organization field, click the select button.
- 5 In the Organizations dialog box, click New.
- 6 In the Add Organizations dialog box, select the Organization for the group you want to share the Facility with, and click OK.
- 7 In the Organizations dialog box, click OK.

This facility will be visible to this group organization in the All Facilities view.

Viewing Information About Group Members

Members are individuals who are insured by a carrier. In some cases, members are also known as policyholders, subscribers, or insureds.

The Group Portal allows you to reduce the work you do to enter and maintain information about members. The group can enter this information in the Members screen of the Group Portal, and then you can view it in the Members screen of the Partner Manager or of Siebel eHealthcare.

For more information about entering and maintaining information about members, see the section about members in *Siebel Healthcare Guide*.

To view information about a member

- 1 Navigate to the Members screen.
- 2 In the Members list, select the member you want to view information about.
- 3 Click the view tabs to display more information associated with that member.

Viewing Information About Providers

The Providers screen allows insurance carriers to view and manage information about providers. Providers are healthcare professionals who are paid by, or file claims with, your health plan or health insurance company. Examples of providers are physicians, nurse practitioners, dentists, and pharmacists.

For more information about using the Providers screen, see the section about providers in *Siebel Healthcare Guide*.

After information about providers has been entered, you can share it with employer groups, so they can view information about the providers that are available to them using the Providers screen of the Group Portal. To do this, you share provider information with a group administrator at a group company, and this administrator will be able to view it in the My Providers view of the Providers screen of the Group Portal.

To share information about a provider with an employer group

- 1 Navigate to the Providers screen.
- 2 In the Providers list, select the provider you want to share with a group.
- 3 In the More Info form, click the Show More button.
- 4 In the More Info form, in the Contact Team field, click the select button.
- 5 In the Coverage Team dialog box, click New.
- 6 In the Add Employees dialog box, select the group employee you want to share the Provider with, and click OK.
- 7 In the Coverage Team dialog box, click OK.

This provider will be visible to this group employee in the My Providers view.

Facility Locator and Provider Locator

Employer groups can use the Group Portal's Health Facility Locator and Provider Locator to search for health facilities and providers that are near to them.

Before these locators can be used, the health plan or insurance company must add addresses for the provider locator and add facilities to the facility locator.

For more information, see the sections about adding addresses for the provider locator and about adding facilities to the facility locator in *Siebel Healthcare Guide*.

Managing Sales, Service, and Marketing

Several chapters of *Siebel Partner Relationship Management Administration Guide* describe possible scenarios that illustrate ways the insurance carrier and employer group company might use Siebel PRM to manage sales, service, and marketing. The scenarios are meant to illustrate many possible uses of Siebel PRM.

Most of these scenarios do not apply to the Group Portal:

- **Sales.** The chapter of sales scenarios does not apply to the Group Portal.
- **Service.** In the typical scenario for service requests:
 - The employer group administrator logs a service request using the Service view of the Group Policies screen of the Group Portal.
 - The carrier views these service requests and responds to them using the Service screen of the Partner Manager.
 - The employer group administrator views the response using the Service view of the Group Policies screen of the Group Portal.
- **Marketing.** The scenarios for collaborative marketing and for marketing to your partners might apply to the Group Portal.

- **Partner Commerce.** The chapter of scenarios for partner commerce does not apply to the Group Portal.

Managing Your Partners

The managing partners chapter of *Siebel Partner Relationship Management Administration Guide* discusses many different ways of managing your partners. The Partner Manager for Financial Services has some added features, which are covered in [Chapter 2, "Siebel Agent Portal."](#)

Most of the features used for managing partners do not apply to the group portal.

The features that you are most likely to use with the group portal are:

- **Partner Alerts.** Display messages to partners on the Group Portal home screen.
- **Siebel eBriefings.** Give partners news and information about companies.

These features are described in the managing partners chapter of *Siebel Partner Relationship Management Administration Guide*.

Sections that Do Not Apply

A number of chapters of *Siebel Partner Relationship Management Administration Guide* do not apply to your work with groups and should not be used as documentation for the Group Portal, including the chapters about:

- **Setting Up ASIs.** Describes how to set up the Application Service Interfaces used for shopping cart transfer and opportunity transfer, which do not apply to your work with groups.
- **CHAMP Planning.** Describes a process of collaborative planning that does not apply to your work with groups.
- **Market Development Funds.** Describes a process of funding marketing by partners that does not apply to your work with groups.
- **Reporting on Partner Performance.** Describes reports to analyze partner performance that do not apply to your work with groups.

7

Siebel PRM for Communications, Media, and Energy

Siebel PRM for Communications, Media, and Energy 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 communications, media, or energy company, go through the process of enrolling partner companies. The communications, media, or energy company can add these companies' employees or can assign this task to a delegated administrator at each company.
- Then, you can share opportunities, service requests, and other business information with partner employees as you do with your own employees.
 - The communications, media, or energy company's employees work with this information using Siebel eCommunications Partner Manager, Siebel eMedia Partner Manager, Siebel eEnergy Partner Manager, or Siebel eOil, Gas, and Chemicals Partner Manager, which let them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Partner Portal.
- The communications, media, or energy company can also use Partner Manager to:
 - Send alerts, 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.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM](#)
- [Support for Complex Account Structures on page 56](#)
- [Support for Complex Ordering Process on page 57](#)
- [Association of Agreements with Orders or Service Items on page 57](#)
- [Support for Credit Management on page 58](#)
- [Support for Fraud Management on page 59](#)

Overview of Differences from Siebel PRM

This document covers only features of Siebel PRM for CME that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

The most important differences are:

- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel PRM for CME, in addition to these books, the reader should see *Siebel Communications Guide* and *Siebel Energy Guide*.
- **Functionality of the Partner Manager.** Siebel eCommunications Partner Manager, Siebel eMedia Partner Manager, Siebel eEnergy Partner Manager, and Siebel eOil, Gas, and Chemicals Partner Manager have the Partner-specific functionality of Siebel Partner Manager in addition to all the functionality of Siebel eCommunications, Siebel eMedia, Siebel eEnergy, or Siebel eOil, Gas, and Chemicals. The added functionality includes:
 - Support for complex orders
 - Support for premises management
 - Support for work orders
 - Support for agreements
 - Support for assets

In addition, Siebel Partner Portal for Communications, Media, and Energy includes:

- Portions of Siebel eService for Communications, Media, and Energy functionality
- Siebel PRM eCommerce functionality

NOTE: Many of these features are separately licensed options.

Support for Complex Account Structures

The communications, media, and energy industries often use complex account structures. For example, a single business customer may have many accounts with a utility for gas service and electrical service at multiple sites.

For communications, media, and energy, Siebel Partner Manager and Partner Portal have special features to support the complex account structures that are common in these industries, including:

- **Account Hierarchies.** Account hierarchies allow you to create multiple billing accounts and service accounts for a single customer. This feature gives you flexibility in selling and in providing service and sending invoices and statements to a customer's different sites.
- **Account Contacts.** Account contacts allow you to select the account for a contact. This feature is needed because contacts can have multiple accounts in communications, media, and energy.

For information about account hierarchies and contacts, see *Siebel Communications Guide* or *Siebel Energy Guide*.

The screens and views of the Partner Manager used for these features are identical to those used for the same purposes in Siebel Communications, Siebel Media, and Siebel Energy.

The comparable screens and views of the Partner Portal support the subset of this functionality that your partners need.

For more information, see *Siebel Communications Guide* or *Siebel Energy Guide*.

Support for Complex Ordering Process

In the communications, media, and energy industries, it is common for customers to place complex orders, which include both products and services that involve an ongoing relationship with the customer.

After making the purchase, customers may want to change an activated service. For example, customers who buy cell phones and cell phone service may want to upgrade the number of minutes in their plan, may want to add wireless Web to their existing service, or may want to disconnect the service.

Siebel PRM for CME has a number of changes to support these sorts of complex orders and the complex bundles of products and services that customers purchase:

- **Common Order Types.** The following order types are supported:
 - **New Order.** Used for procurement of new products and services.
 - **Modify Order.** Used to modify existing assets.
 - **Disconnect.** Used to remove an existing asset.
 - **Supplemental.** Used to modify in-flight orders.
 - **Move Order.** Used to move assets from one geographical location to another.
- **Support for Service Profile.** The brand owner or reseller is able to see all active assets.
- **Apply Open Orders.** If you are modifying an order, you are able to see the future requested state of that order.

The screens and views of the Partner Manager used for quotes and orders are identical to screens used for the same purposes in Siebel eCommunications and Siebel eEnergy. For more information, see *Siebel Order Management Guide Addendum for Industry Applications*.

The screens and views of the Partner Portal used for quotes and orders include both screens comparable to those used for the corresponding purposes in Siebel eSales and screens comparable to those used for the corresponding purposes in Siebel eCommunications, Siebel eMedia, and Siebel eEnergy. For more information about this order process and the workflows that it uses, see *Siebel Order Management Guide Addendum for Industry Applications*, *Siebel Partner Relationship Management Administration Guide*, and *Siebel Communications Guide* or *Siebel Energy Guide*.

Association of Agreements with Orders or Service Items

Siebel PRM for Communications, Media and Energy allows users to associate agreements with quotes and orders.

Agreements can be associated with quotes or orders in two ways:

- **At the header level.** Choose an agreement in the header record if one agreement applies to all the items in the quote or order.
- **At the item level.** Choose agreements in the item record if each item has its own agreement.

If you have licensed Siebel Order Management, when the quote is promoted to an order, all the associated information, including the agreement, is automatically associated with the order.

Siebel PRM for Communications, Media, and Energy also allows users to associate agreements with service items. This can also be done either at the header level, to associate a single agreement with all the service items, or at the item level, to associate different agreements with different service items.

Agreements can be used with the following types of partners:

- **Partners who service your product.** The brand owner has already sold a product to a customer and created an agreement. He shares the service agreement with the partner. Then the partner provides service to the customer in keeping with the terms of the agreement.
- **Partners who sell your product.** When the partner sells the product to a customer, the partner creates an order with an associated agreement. This may be a standard agreement, which the partner can use without brand owner approval, or the partner may have to submit the agreement to the brand owner for approval.

NOTE: The agreements module is optimized for maintenance agreements, which are used when a customer buys a product and the manufacturer creates an agreement to maintain the product.

For more information about linking agreements to service items and working with agreements, see the section about agreements in *Siebel Communications Guide* or *Siebel Energy Guide*.

Support for Credit Management

If customers are late in paying their bills or have not paid their bills in full, their accounts are flagged by a third-party credit system, which you can integrate with Siebel PRM for CME using Siebel's Enterprise Application Integration (EAI) module. The rules for detecting late payment or nonpayment are defined in the credit system. Siebel PRM for CME can interpret late payment or nonpayment messages that the credit system generates.

As a basis for credit management, Siebel PRM for CME provides information in the form of credit alerts. A *credit alert* is a Siebel PRM for CME credit record that can be generated by messages from a back-office credit management system when a customer breaches a credit threshold. It can also be generated manually by a customer request or by the initiative of a customer service representative (CSR). Credit alerts can be resolved through a variety of means, such as customer payment of the outstanding amount, adjustments to a customer account to correct an erroneous billing, and an agreement with a customer for a payment arrangement plan.

The screens and views of the Partner Manager used for credit management are identical to those used for this purpose in Siebel Communications, Siebel Media, and Siebel Energy.

The comparable screens and views of the Partner Portal support corresponding functionality for your partners.

For more information, see *Siebel Communications Guide* or *Siebel Energy Guide*.

Support for Fraud Management

Fraud occurs when someone uses a service to defraud a consumer, business, or service provider by obtaining free services or services that the individual is not entitled to.

Fraud can be identified in various ways. For example, a consumer may identify fraud on a bill, noting charges for services that were not requested or used. Alternatively, a service provider may identify irregular patterns that may indicate fraud.

The fraud management process involves fraud alerts, which are warnings that a fraud may have been committed.

The back-office system issues a fraud alert by placing the customer on a fraud list, a list of customer accounts that are suspected of or confirmed for fraud. The back-office system may generate multiple lists, classified by categories in descending order of the likelihood of fraud.

To help you resolve cases of suspected or obvious fraud, Siebel PRM for CME allows you to view fraud lists, fraud alerts, fraud-related background information about accounts, and the history of fraud-related activities for an account.

The screens and views of the Partner Manager used for fraud management are identical to those used for this purpose in Siebel Communications, Siebel Media, and Siebel Energy.

The comparable screens and views of the Partner Portal support corresponding functionality for your partners.

For more information, see *Siebel Communications Guide* or *Siebel Energy Guide*.

8

Siebel PRM for Apparel and Footwear

Siebel PRM for Apparel and Footwear allows you to work with partners as efficiently as you work with employees of your own company.

- To set up Siebel PRM, you, as an apparel or footwear manufacturer, go through the process of enrolling partner companies. The apparel or footwear manufacturer can add these companies' employees or can assign this task to a delegated administrator at each company.
- Then, the apparel or footwear manufacturer can share business information with partner employees as you do with your own employees.
 - The apparel or footwear manufacturer's employees work with this information using Siebel eApparel & Footwear Partner Manager, which lets them manage this information in the same way they do using their Siebel application.
 - Partner employees view and work with this information using Siebel Partner Portal.
- The apparel or footwear manufacturer can also use Siebel Partner Manager to:
 - Send alerts, 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.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM](#)
- [Direct and Indirect Distribution on page 62](#)
- [Adding New Partners on page 63](#)
- [Personalization for Apparel and Footwear on page 64](#)

Overview of Differences from Siebel PRM

This document covers only features of Siebel PRM for Apparel and Footwear that are different from the features of Siebel PRM. It is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

The most important differences are:

- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel PRM for Apparel and Footwear, in addition to these books, the reader should see *Siebel Consumer Goods Guide*.
- **Functionality.** The functionality of Siebel PRM for Apparel and Footwear is different from the functionality of Siebel PRM because it:

- Supports both direct and indirect distribution.
- Uses a different process of adding new partners.
- Typically uses personalization differently.

Direct and Indirect Distribution

Siebel PRM is often used differently in the apparel and footwear industries than in other industries.

- **Indirect distribution in most industries.** In most industries, Siebel PRM is used to work with partners who are active resellers or service providers to customers. Because partners actively pursue sales and respond to service requests, the Siebel Partner Portal provides them with information about sales opportunities, customer service requests, customer accounts, customer contacts, and other information needed to deal with customers. Brand owners may also set up market development funds to provide funding to help partners sell their products; for example, they might give partners funding to display their products at trade shows.
- **Direct distribution in apparel and footwear.** In the apparel and footwear industry, Siebel PRM is most often used to work with partners who are retailers. The brand owner sells products directly to retailers, who retail the products to consumers. In this *direct distribution* model, the retailer is both the channel partner and customer for the apparel and footwear brand owner. The brand owner does not share sales opportunities, customer service requests, or other information used to deal with customers.
- **Indirect distribution in apparel and footwear.** In apparel and footwear, Siebel PRM is sometimes used to work with partners who are intermediary distributors or resellers who sell the products to retailers. In this *indirect distribution* model, the distributor or reseller is the channel partner, and the retailer is the customer. In this model, the brand owner may share sales opportunities, customer accounts, and other information needed to deal with customers with partners. For example, a brand owner may learn about a sales opportunity with a major retailer and assign this lead to one of its channel partners. Then the partner may work on that lead and orders products from the brand owner to resell to the retailer.

Direct Distribution for Apparel and Footwear

Because direct distribution is most common in these industries, as it is installed out of the box for apparel and footwear, Siebel PRM displays only the screens needed for direct distribution.

By default, for apparel and footwear, the Siebel Partner Portal displays the following screens:

- **Home.** The personalized home page greets users by name and displays links to their recent work, such as current quotes and orders. Users can click any of these links to view complete information about them.
- **Accounts.** This screen lists accounts associated with the user.
- **Assortment.** This screen lists assortment plans that have been created for users by an account representative in Siebel Partner Manager or in Siebel eApparel & Footwear.

- **Quotes.** This screen lists quotes created for or by users, which you can view using Siebel Partner Manager or Siebel eApparel & Footwear. Users can create quotes by selecting products from product catalogs personalized for their accounts. Users also select size distributions for products in their quotes.
- **Orders.** This screen lists orders that users placed for their accounts, which you can view using Siebel eApparel & Footwear.
- **Catalog.** This screen lists the product catalogs personalized for the user's account.

To create and administer a Siebel PRM for Apparel & Footwear Web site, you must complete the following tasks:

- **Set up Siebel PRM.** Install and configure Siebel PRM, add new channel partner companies, add channel partner employees as users, and give login access to channel partners. For more information, see the chapters about setting up Siebel PRM and working with new partners in *Siebel Partner Relationship Management Administration Guide*.
- **Administer products.** Define products, create product catalogs, and associate price lists with product catalogs. For more information, see *Siebel eSales Administration Guide*.
- **Administer sizes.** Create size scales and size distributions. For more information, see *Siebel Consumer Goods Guide*.

Indirect Distribution for Apparel and Footwear

By default, for apparel and footwear, the Siebel Partner Manager displays the screens you use to work with the direct distribution model.

However, Siebel PRM also provides supplemental features that support the indirect distribution model for apparel and footwear. They include all the screens that Siebel PRM uses to support the indirect distribution model in other industries, such as the Opportunities, Contacts, Service Requests, and Market Development Fund screen.

As another supplemental feature for apparel and footwear, Siebel PRM also provides delegated administration. You can designate employees of channel partner companies as delegated administrators, and these delegated administrators can use the Siebel Partner Portal to perform administrative tasks, such as adding new Siebel PRM users at the partner company. This feature helps you reduce the time that you must spend on administrative tasks.

These supplemental features are used the same way for apparel and footwear as they are for other industries. For information about using Siebel PRM with these supplemental features, see *Siebel Partner Relationship Management Administration Guide*.

Adding New Partners

Siebel Partner Relationship Management Administration Guide describes the process of adding new partners.

In Siebel PRM, companies typically apply to become partners by registering at the Siebel Partner Portal. When they register, they enter information that is stored in a Prospective Partner record. When the brand owner approves them, the Prospective Partner record is converted to a Partner record.

This model of partner registration does not apply to the apparel and footwear industry. Manufacturers develop relationships with retailers through a process that cannot be performed through applying at a Web site.

For this reason, the section about Registering Individual Partners in *Siebel Partner Relationship Management Administration Guide* does not apply to apparel and footwear.

In addition, the process of adding new partners is different for apparel and footwear. In *Siebel Partner Relationship Management Administration Guide*, the enrollment process begins with the following two steps:

- **Display and assess prospective partners.** Begin by displaying the list of prospective partners recruited through the Web and deciding which to approve as partners.
- **Add a Partner record for the partner company.** You typically add a Partner record by approving a prospective partner.

These two steps do not apply to apparel and footwear, and they should be replaced by the following:

- **Recruit new partners.** Recruit retailers as partners in the usual way, without using Siebel PRM.
- **Add a Partner record.** Add a record for the new partner directly in the Partner Administration screen.

After the first two steps, the rest of the process of adding a new partner or dealer is the same as in Siebel PRM.

For information about adding a new Dealer or Partner record directly, see the section about other ways of adding partner records in *Siebel Partner Relationship Management Administration Guide*.

Personalization for Apparel and Footwear

Distributing the right products through the right channels is important to an apparel or footwear manufacturer. If you have multiple channel partners operating in the same locale, such as a shopping mall, you would want them to be carrying different sets of products to avoid unnecessary price reductions that ultimately erode the brand equity of your products. Typically, an apparel and footwear manufacturer determines the product mix that an account should carry based on the market segmentation of the account.

Siebel Personalization allows apparel and footwear manufacturers to set up personalization rules that evaluating attribute values of account profiles to determine which product catalogs, product categories, and products retailers can view through the Siebel Partner Portal.

To use personalization effectively, you must:

- **Set Up Account Channel and Product Differentiation Lists of Values.** To specify Account Channel and Product Differentiation values for accounts, products, catalog categories, and catalogs, you choose from lists of values. These lists of values can be changed to meet your company's needs.
- **Enter Product Attributes.** You can select values for the Account Channel and Product Differentiation fields in product records.
- **Enter Catalog Categories and Catalog Attributes.** You can select values for the Account Channel and Product Differentiation fields in catalog category and catalog records.
- **Enter Account Attributes.** You can enter values for the Account Channel and Product Differentiation fields for every account, as described in the section that follows.

For more information about all these tasks, see *Siebel Consumer Goods Guide*.

Account Profile Attributes

The following attributes are used to evaluate an account's segmentation:

- **Account Channel.** Determines which type of distribution channel the account belongs to. Example values in this attribute are department stores, athletic specialty stores, and discount stores.
- **Product Differentiation.** Determines the type of products within any category that the account should carry. For example, an account with a Product Differentiation value of fashion should be carrying products that cater to fashion-conscious consumers.

These two attributes are found in the following Siebel objects:

- Accounts
- Products
- Catalogs
- Catalog Categories

Siebel eApparel & Footwear Personalization Rules

Siebel PRM includes a number of predefined personalization rules that you can use to control which products are visible to retailers. You can also alter these rules to fit your company's business needs.

The Personalization rule sets included in Siebel eApparel & Footwear, which determine the content displayed to users of Siebel PRM for Apparel & Footwear, are described in [Table 3](#).

Table 3. Siebel eApparel & Footwear Personalization Rules

Rule Set	Description	Applicable Applets
Catalogs	Determines what catalogs should be shown based on an Account's profile attributes. Out of the box, this rule set matches values stored in the account channel attribute of the account and catalog objects.	Product Catalog Form Applet TAF Account Product List Applet
Categories	Determines what categories within a catalog should be shown for an account. This rule set checks for entries in the Catalog Account Categories table and displays only categories that exist in the table.	TAF Product Catalog Category List Applet
Products	Determines what products will be displayed based on the account's profile attributes. Out of the box, this rule set matches values stored in the Account Channel and Product Differentiation attributes of the Account and Product objects. It also checks the effective dates of a product and displays those that are within the season of the catalog.	TAF Assortment Plan Product List Applet

Siebel eApparel & Footwear also includes other personalization rule sets. [Table 3](#) describes only the rule sets that are most relevant to targeting products to customers based on market segmentation.

Application Service Interfaces

Siebel PRM includes Application Service Interfaces (ASIs) that allow brand owners and partners to share opportunities and that allow customers to transfer a shopping cart from the brand owner's Web site to the partner.

These do not apply to the apparel and footwear industries, and they are not supported by Siebel PRM for Apparel and Footwear.

9

Siebel PRM for Consumer Goods

Siebel PRM for Consumer Goods allows consumer goods manufacturers to work with their partners in the same way they work with their own employees.

Partner employees are stored in the Siebel database just as your own employees are. The only difference is that partner employees are in organizations that you have created to represent your partner companies, while your employees are in organizations that you have created to represent your own company.

NOTE: In addition to partner-specific screens, Siebel PRM for Consumer Goods gives your partners visibility to the same end-user screens that your employees use. To access the full range of screens, Siebel PRM for Consumer Goods must be deployed in the high interactivity mode.

This chapter includes the following topics:

- [Partner Company Setup](#)
- [Your Work with Partners](#)
- [High Interactivity and Standard Interactivity on page 68](#)

Partner Company Setup

To set up PRM for Consumer Goods, you can use your Siebel application to create organizations, positions, and responsibilities for partner companies in the same way you create them for your own company. You should create a separate organization for each partner company, so it cannot view your company's data or other partners' data. For more information about setting up organizations, responsibilities, and positions, see *Siebel Applications Administration Guide*.

Alternatively, you can use the Siebel Partner Manager's Partner Administration screen to create partner organizations and to assign positions and responsibilities to the partner company. For more information, see the chapter about working with new partners in *Siebel Partner Relationship Management Administration Guide*.

After setting up the appropriate organizations and responsibilities, you can enter partner employees, or you can have delegated administrators at the partner company enter partner employees.

Your Work with Partners

After you have set up partner companies and partner employees have been entered, you work with partner employees in the same way you do with your own employees.

Siebel PRM for Consumer Goods Partner Portal includes the end-user screens of Siebel eConsumer Goods. You assign partners information such as Accounts, Contacts, and Literature in the same way you assign this information to your own employees. Partners use the Partner Portal to work with this information in the same ways that your employees use the end-user screens of Siebel eConsumer Goods to work with this information. For information about sharing information with your employees, see *Siebel Consumer Goods Guide*.

Siebel PRM for Consumer Goods Partner Portal also includes screens that allow your partners to enter and maintain information about partner employees. It is generally easiest for delegated administrators at the partner companies to enter and maintain partner employee records.

High Interactivity and Standard Interactivity

In Siebel PRM for Consumer Goods, the partner portal supports only high interactivity, because it uses some of the same end-user screens as the eConsumer Goods employee application, which is always deployed in the high interactivity mode.

For more information about standard and high interactivity, see *Using Siebel Tools*.

10 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 application.
 - Partner employees view and work with this information using Siebel Partner Portal.
- The brand owner can also use Siebel Partner Manager to:
 - Send alerts, 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.

This chapter includes the following topics:

- [Overview of Differences from Siebel PRM](#)

Overview of Differences 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, which is in *Siebel Partner Relationship Management Administration Guide*.

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 *Siebel Partner Relationship Management Administration Guide*.

Siebel Partner Relationship Management Administration Guide provides several chapters of scenarios illustrating the different ways that Oracle's Siebel PRM can be used to manage sales, service, and marketing. Many of these scenarios may not apply in your industry.

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