SIEBEL 7

eBusiness

SIEBEL PARTNER RELATIONSHIP MANAGEMENT ADMINISTRATION GUIDE

VERSION 7.5

12-BD6PXR

JULY 2002

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Introduction

This guide describes how to set up Siebel Partner Relationship Management (Siebel PRM) and how to use Siebel PRM to:

■ Recruit and enroll new partners.

■ Certify and train partners.

■ Share information with partners.

■ Manage partners.

■ Assess partner performance.

This book will be useful primarily to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Channel Operations Managers	Persons responsible for planning and setting up partner operations.
Channel Managers	Persons responsible for managing the relationships with partners and supervising daily partner operations.
Channel Marketing Managers	Persons responsible for defining and executing the marketing strategy to and through partners.
Channel Executives	Persons responsible for defining the overall strategy for the partner organization.

How This Guide Is Organized

This book's organization is topic-based, in sequential order. It leads you through the tasks for setting up Siebel PRM, recruiting partners, planning your work with your partners, working with your partners, and analyzing your partners' performance.

Revision History

Siebel Partner Relationship Management Administration Guide, Version 7.5

About Siebel PRM **1**

This chapter is a general overview of the capabilities of Siebel PRM. It summarizes the functionality of the Siebel Partner Manager and the Siebel Partner Portal, and it discusses supported platforms.

What Is Siebel PRM?

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

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

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

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

Siebel PRM is made up of five applications:

■ **The Siebel Partner Portal.** The portal that partner companies use to share business information with the brand owner and to do some administrative tasks.

■ **The Siebel Partner Manager.** The application that the brand owner company uses to share business information with partners and to manage partners.

■ **Siebel Partner Manager Analytics.** Tools that allow the brand owner to analyze and manage performance of their partners and of their channel go-to-market programs.

■ **Siebel Partner Portal Analytics.** Tools that allow partners to analyze and manage their performance.

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

The Siebel Partner Portal

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

Siebel Partner Portal Login Page

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

This home and login page has several functions:

■ It lets public users learn more about your company and partnership programs.

■ It lets individuals register as partners and view the information available to individual partners.

■ It lets companies apply to become partners.

■ It lets employees of partner companies log in, so they can use the full functionality of the partner portal Web site.

Siebel Partner Portal Screens

After employees of partner companies log in, they see a Web site similar to the one shown in Figure 1. Partners see only the screens that are appropriate to their responsibilities and screen tabs that are appropriate to their role.

Figure 1.   The Siebel Partner Portal Web Site

The home page includes a list of tasks that are associated with the partner's role. For example, if the partner employee has the role Sales Representative, the home page will have a My Tasks applet, with hyperlinks that the employee can click to perform common tasks for sales representatives, such as viewing and updating opportunities, which you set up using the Role Administration screen. For more information about roles, see "Administering Roles" on page 46.

Partners click the tabs of the Siebel Partner Portal to use the following Siebel PRM screens. These screens generally have many views, as screens typically do in your own Siebel application.

NOTE: As an overview, this list includes all the screens of the Siebel Partner Portal. When an employee logs in, the screens that are available are limited by the employee's responsibilities and the screen tabs that appear are limited by the employee's role.

Siebel Partner Portal includes the following screens:

■ **Home.** Greets the partner employee by name and provides links to the employee's current work. The partner can click any of these items to view more information about it.

■ **Opportunities.** Displays sales opportunities that you assigned to the partner. The partner can also enter new opportunities here, and you can view them using the Siebel Partner Manager.

■ **Accounts.** Displays customer accounts that you assigned to the partner. The partner can also enter new companies here, and you can view them using the Siebel Partner Manager.

■ **Service Requests.** Displays customer service requests that you assigned to the partner. The partner can also enter new service requests here, and you can view them using the Siebel Partner Manager.

■ **Contacts.** Displays customer contacts that you assigned to the partner. The partner can also enter new contacts here, and you can view them using the Siebel Partner Manager.

■ **Activities.** Displays activities that the partner should do to complete sales or fulfill service requests. You can assign activities to partners, or partners can schedule and enter activities themselves and you can view them using the Siebel Partner Manager.

■ **Customer Quotes.** The partner can use this screen to generate, review, and modify quotes for customers, which you can view using the Siebel Partner Manager.

■ **Customer Orders.** The partner can use this screen to enter, review, and modify customer orders, or you can use it to assign customer orders to the partner for fulfillment.

■ **Product Catalog.** Displays a catalog of your products that you have made available to the partner.

■ **Infocenter.** Displays sales literature, other documents, and other master data that you have made available to partner organizations. The partner can download these documents or view this master data.

■ **Solutions.** Displays solutions to common service requests.

■ **Funds.** Displays market development funds in which this partner company is a participant, with a checkbook that lists the amount spent and balance available in each fund.

■ **Fund Requests.** Displays requests made against market development funds in which this partner company is a participant. The partner can enter new requests for funding or you can enter requests on the partner's behalf using the Siebel application. Partners can also view the status of requests during the approval process.

■ **Assets.** Displays assets. Used by field service businesses to track assets that field engineers must service.

■ **Inventory.** Displays inventory. Used by field service businesses to track parts that field engineers use for service.

■ **eBriefings.** Gives the partner news and up-to-date information on your company, your accounts, your competitors, news bulletins, and so on.

■ **Calendar.** Allows partners to manage their daily, weekly, and monthly activities.

■ **Administration.** Allows the partner's delegated administrator to enter positions, to add and remove users, and to associate users with responsibilities.

■ **Partner Locator.** Allows partners and customers to find the right partner to meet their needs. For example, they can find the partners who are located closest to them, or the partners who provide the products or services they want.

■ **Logout.** Disconnects the partner from your database. The partner can use this feature for security reasons, so no one else can use the data after the partner has left the computer.

■ **Profile.** Displays the partner employee's user and company profile.

■ **Help.** Displays a help page that includes instructions about using Siebel PRM through the Web.

The Siebel Partner Manager

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

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

It addresses the needs of everyone who works with partners. Vice Presidents of Channels can use it to analyze partner sales forecasts or partner performance. Channel marketing managers can use it to execute marketing programs. Channel operations managers can use it to collaborate with partners in customer sales and service.

Screens the Siebel Partner Manager Shares With Other Siebel Applications

When the partner managers at your company use Siebel PRM, they see the Siebel Partner Manager Web site, which is similar to the one shown in Figure 2, though the actual screens that your employees see depend on their responsibilities, and the screen tabs that they see depend on their roles.

Figure 2.   The Siebel Partner Manager Web Site

The home page includes a list of tasks that are associated with the employee's role. For example, if the employee has the role Channel Account Manager, the home page will have a My Tasks applet, with hyperlinks that the employee can click to perform common tasks for channel account managers, which you set up using the Role Administration screen. For more information about roles, see "Administering Roles" on page 46.

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

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

You can also share information with partners using other Siebel applications. For example, you can assign a contact to a partner by using the Contacts screen of Siebel Sales, Siebel Service, or Siebel Call Center. Partners are entered in your Siebel database as employees, and you work with them the same way you work with your own employees. If you are logged in under the same user name, you can work with the same data in the Siebel Partner Manager or in other Siebel applications, or Siebel Call Center, whether it is data about your partners or about your own employees.

This guide covers features of the Siebel Partner Manager that are particularly useful in working with your partners. It does not cover many of the features that the Siebel Partner Manager has in common with Siebel Sales, Siebel Service, and Siebel Call Center.

For more information on these common features, see *Siebel Sales User Guide*, *Siebel Call Center User Guide*, and *Applications Administration Guide*.

Screens That Are Specific to the Siebel Partner Manager

In addition to incorporating the functionality of other Siebel applications, the Siebel Partner Manager includes several screens that are specific to Siebel PRM, which are used only for managing partners:

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

■ **Partners.** The Partners screen lets you record general information about your partners. It also helps you manage your relationship with your partners. For example, it lets you work with the Partner Profile and Partnership Profile, it lets you assess your partners' performance, it lets you enter and look up partner management activities, contacts, and notes, and it lets you view your partners' progress in your training and certification programs.

■ **Partner Operations.** The Partner Operations screen lets partner managers view the transactional data for a given partner, to give you an overall view of the partner's operations. You can look up a partner, and see its accounts, contacts, opportunities, orders, quotes, and service requests.

■ **Partner Administration.** The Partner Administration screen lets you do much of the work that you must do to add a new partner company, such as adding a record for the partner, assigning user IDs and passwords to partner users, and approving and registering partner companies. In this screen you can complete the necessary steps to get a partner company started, including creating a new organization and putting it in the proper place in the hierarchy. You can also administer partner information, such as adding or changing information about users, or about the partner organization.

■ **CHAMP Planning.** Siebel PRM provides tools to support the Channel and Alliance Management Process (CHAMP), which helps alliance and partner organizations improve business performance. You can use the CHAMP planning screen to create new initiatives, which are corporate strategies for a given period. After you have created an initiative, you can add partners as participants, and then create a specific partner plan for working with each participant. Finally, you can add objectives that help your partners to accomplish the goals of the plan.

- **Certifications.** The Certification screen lets you set up programs to certify partners. For example, you may require that your partners be certified in a certain product or service that you offer to make sure that your partners deliver those products or services in the same way that your company delivers them. You can use this screen to define any levels of certification that you choose, and any criteria that you choose for each level of certification.

- **Alert Administration.** When partners log in to the Siebel Partner Portal, it displays a personalized home page for each partner. This home page includes a Partner Alert applet, which displays Web messages that you create for your partners. Using Alert Administration, you can direct these partner alerts to all partners or to specific individuals.

- **Fund Design.** Market development funds are funds which are allocated for joint marketing activities during a certain period. These funds can be used to help your partners with activities that help generate demand for your product or service, in a direct or indirect way. The Fund Design screen lets you create market development funds, specifying how much funding the fund has and which partners participate in and can request funding from each Fund.

- **Fund Requests.** After market development funds have been created, partners or partner managers make requests for specific use of these funds, such as paying for a partner to participate in a trade show where they will display your product. The Market Development Fund Requests screen lets you work with and approve these requests.

Supported Browsers

Like other Siebel applications, Siebel PRM is Web-based. Users can use a Web browser to work with Siebel PRM.

For more information on the browsers supported by Siebel applications, see *Siebel System Requirements and Supported Platforms*.

The Siebel Mobile Web Client

In addition to working directly through the Web in connected mode, it is possible for you and your partners to use your Siebel applications through the Siebel Mobile Web client. The Siebel Mobile Web client lets you or your partners work when you are disconnected from the Web and synchronize data with the rest of the Siebel database later.

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

When you set up mobile users, you must associate a routing model with each mobile user. The routing model describes the data that will be synchronized between the user's local database and the server database. For a Partner Manager user, be sure to use the routing model named *Mobile Client - Standard*. For a mobile Partner Portal user, use the routing model named *Mobile Partner User*. In addition, a mobile Partner Portal user should have only one responsibility, *Partner User - Mobile*, in order to prevent the mobile user from seeing views that contain data which is not synchronized.

For security purposes, mobile users of Partner Portal must have access to the brand owner's private network or connect through a virtual private network.

For more information about using the Siebel Mobile Web client, see *Siebel Web Client Administration Guide*.

The Siebel PRM Wireless Client

In addition to using Siebel Partner Portal on computers through the Siebel Web client, your partners can use Siebel Partner Portal mobile phones through the Siebel Wireless client.

Because of the limited screen size of mobile phones, Siebel eWireless displays only a subset of each Siebel Web client view.

For example, with the wireless Partner Portal, partners can manage accounts, opportunities, service requests, orders, contacts, solutions, activities, correspondence, and general information.

For more information on the Wireless client, see *Siebel Wireless Administration Guide*.

Setting Up Siebel PRM   2

This chapter discusses how to set up Siebel PRM. It summarizes the processes of installation and configuration, and it looks at how you set up access to data and user access. It also includes a section about configuring visibility.

About Siebel PRM Setup Processes

Before using Siebel PRM, you must set it up by going through two processes:

■ Install and configure Siebel PRM.

■ Set up access to data, which involves setting up organization hierarchy, access groups, responsibilities, and user access.

Installing and Configuring Siebel PRM

To install and configure Siebel PRM, you go through the following process:

■ Install Siebel PRM

■ Activate Workflows

■ Configure Siebel PRM

■ Configure Web Site Help

■ Set Up Personalization

■ Set Up Advanced Search

■ Set Up Siebel Analytics

Installing Siebel PRM

To install Siebel PRM, you must:

■ **Install a Web Server.** Like other Siebel applications, Siebel PRM includes the Siebel Web Server Extension (SWSE). The Web server must be already installed before you install Siebel PRM.

■ **Install the Siebel Server.** When you install the Siebel Server, you must enable at least the following components to use Siebel PRM:

   ■ Siebel PRM

   ■ Workflow Management

   ■ Communications

- **Configure Server Components.** After installing the server, you must configure the following server components:

    - **Siebel Communications Server.** For users to send email, fax, or wireless messages you must configure the Siebel Communications Server. For information about setting up the Siebel Communications Server, see *Siebel Communications Server Administration Guide*.

    Chart Server. For users to produce charts, you must configure the chart server. For information about setting up the Chart Server, see the *Siebel Server Installation Guide* for the operating system you are using."

    - **Actuate Report Server.** For users to produce reports, you must configure the Actuate Report Server. For information about setting up the Actuate Report Server, see the *Siebel Server Installation Guide* for the operating system you are using.

    - **Documents Server.** For users to produce Presentations, Proposals, or Correspondence, you must enable eDocuments during installation and configure the Document Server. For information about setting up the Document Server see *Applications Administration Guide*.

- **Configure eApps.cfg.** After installing, you must edit the file eapps.cfg to use the correct anonymous login. The location of this file depends on where you install it, but typically is in the directory ...\SWEApp\bin. Open this file with any text editor, and edit it so it has the following values:

    - AnonUserName = guestcp

    - AnonPassword = < your password for guestcp >

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

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

For information about installing Siebel applications, see the *Siebel Server Installation Guide* for the operating system you are using.

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

Activating Workflows

In order to use Siebel PRM, you must activate the Registration and eCommerce workflows. Siebel PRM also includes other workflows that you may want to activate.

For more information about workflows, see *Siebel Business Process Designer Administration Guide.*

Activating the Registration Workflows

You must activate the registration workflows to let new partners register through the Siebel Partner Portal.

For more information about partner registration, see Chapter 4, "Working With New Partners."

To activate the registration workflow

1 Log in to the Siebel Partner Manager.

2 Navigate to the Business Process Administration screen.

Workflow Processes should be selected by default in the Show drop-down list.

3 Use a query to find the User Registration workflows:

- User Registration Process

- User Registration SubProcess

- User Registration Initial Process

- User Registration Forgot Password Process

- User Registration Company Information (SCW)

- User Registration Individual Information (SCW)

4 Make sure that the version number for each workflow process is 0, and that the status for each workflow process is Inactive.

5 Select the record for one workflow process and do the following:

    a Click Revise.

    b When the revise operation is done, click Save.

    c In the Workflows list, make sure that a new copy of the process exists with a version number greater than 0, and the status In Progress.

    d Select this new copy of the process, and click Activate to activate the workflow.

6 Repeat Step 5 for each process.

7 Restart the server if you already have it up.

Activating the eCommerce Workflows

Activate the eCommerce workflows allows partner commerce. For more information about partner commerce, see Chapter 7, "Managing Sales."

To activate the eCommerce workflows

1 Log in to the Siebel Partner Manager.

2 Navigate to the Business Process Administration screen.

    Workflow Processes should be selected by default in the Show drop-down list.

3 Find the following workflows, and perform the remaining steps on each of them:

    a All workflows in which the Group field has the value eSales.

    b The workflow named "eChannel - Cancel Order Process"

    c The workflow named "eChannel Go to Current Quote View (eSales)"

    d The workflow named "eChannel Shopping Cart Scenarios Workflow"

4 Make sure that the version number for each workflow process is 0, and that the status for each workflow process is Inactive.

5 Select the record for one workflow process and do the following:

   a Click Revise.

   b When the revise operation is done, click Save.

   c In the Workflows list, make sure that a new copy of the process exists with a version number greater than 0, and the status In Progress.

   d Select this new copy of the process, and click Activate to activate the workflow.

6 Repeat Step 5 for each process.

7 Restart the server if you already have it up.

Activating the Opportunity Management Workflows

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

These workflows are activated in the same way as the registration and eCommerce workflows described previously. Search for the following workflow names:

■ Email Notification of Assigned Opportunity

■ Email Notification of Pending Opportunity

■ Email Notification of Inactive Opportunity

■ Email Notification of Lost Opportunity

■ Email Notification of Won Opportunity

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

Activating Other Workflows

A number of additional workflows are included in the sample data. You can use them as examples or activate them in your implementation of Siebel PRM.

These workflows are activated in the same way as the registration and eCommerce workflows described previously. Search for the workflow names, which are in bold type in the following list:

- **Prospect Registration (eChannel).** Sends email to prospective partners after they register on the Unregistered Partner home page, confirming receipt of their application to be partners.

- **Send Prospect Partner Application Status Email (eChannel).** Sends email to prospective partners when the brand owner acts on their applications, telling them they have been approved or rejected as partners.

- **eChannel Partnership Tier Definition** and **eChannel Partnership Tier Definition Dummy Sub Process.** Determine the appropriate partnership tier, based on the prospective partner's application.

- **CHAMP Update Metrics Workflow.** Automatically inserts the actual values for revenues generated, MDF spending, and training courses completed for objectives defined in a partner's CHAMP Business Plan.

- **CHAMP Plan - Partner Alert** and **CHAMP Plan - Create Alert Message.** Automatically generates a Partner Alert for the appropriate partner when the alliance manager publishes the joint CHAMP Business Plan.

Configuring High Interactivity

The Siebel Partner Manager supports high interactivity.

The Siebel Partner Portal supports both standard interactivity and high interactivity. The default is standard interactivity.

You should configure the Partner Portal to use high interactivity only if you are sure that your partners use Web browsers that support it.

For more information about high interactivity and standard interactivity and the browsers used for each, see *Siebel Tools Reference*.

To configure the Siebel Partner Portal to use high interactivity

1 Use any text editor to open the configuration file for the Siebel Partner Portal, which is < installation directory > \siebsrvr\bin\ < lang > \scw.cfg.

2 Add the following lines to the [SWE] section of scw.cfg:

```
HighInteractivity = True

ShowWriteRecord=TRUE
```

In addition to the configuration file, responsibilities are used to display the calendar on the Siebel Partner Portal home page for high interactivity and standard interactivity.

■ To display the calendar for high interactivity, use the view HI Activity Calendar View

■ To display the calendar for standard interactivity, use the views eCalendar Daily View, eCalendar Monthly View, and eCalendar Weekly View.

By default, all partner responsibilities include the views that display the calendar for standard interactivity. If you configure the Siebel Partner Portal for high interactivity, you must modify all partner responsibilities by deleting these views and adding the view that displays the calendar for standard interactivity.

For more information about defining partner responsibilities, see the section "Defining Partner Responsibilities" on page 43.

Configuring Siebel PRM

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

■ **Look and Feel.** You can configure the look and feel of Siebel PRM to be consistent with the look and feel of your own Web site.

■ **Data Presentation.** You can configure business objects, business components, and fields presented in Siebel PRM in the same way that you do in other Siebel applications. For example, you can add special fields or remove fields that are not needed in your business.

■ **Architecture and Performance Preferences.** You can set logging, file size, timeout, and other system preferences.

NOTE: When you configure Siebel PRM, you should not remove the logout page that appears when the user clicks Logout, and instead display the anonymous user home page. If you do this, the server will not terminate the session. Server sessions could accumulate and exceed the server's maximum.

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

Configuring Online Help

Like other Siebel 7.0 applications, Siebel PRM comes with online help for both the Siebel Partner Manager and the Siebel Partner Portal.

You can change the online help to suit your business model. It can be customized using any HTML editor or Web authoring application.

For more information on customizing online help, see the *Siebel Online Help* readme file.

Personalizing Siebel PRM

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

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

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

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

NOTE: You can also provide targeted content to partners by using partner alerts, eBriefings, and other features of Siebel PRM that are covered in Chapter 13, "Managing Your Partners."

Setting Up Advanced Search

Siebel PRM can search for data in two ways:

- **Search.** Lets users search for data in a specific field of a specific business object.

- **Advanced Search.** Lets users do full text searches of multiple fields in multiple data sources.

Advanced Search uses the Fulcrum SearchServer engine to scan database tables and documents in the Siebel file system.

To implement Siebel Advanced Search, you must complete the following tasks:

- Install Fulcrum SearchServer.

- Set up a separate directory for the search indexes for Siebel eSearch.

- Set up separate ODBC drivers for Siebel eSearch.

- Create and index the search tables.

For information about installing and administering Siebel Search, see the *Siebel Search Administration Guide*.

Setting Up Analytics

Both the Siebel Partner Manager and the Siebel Partner Portal use Siebel Analytics to allow partner managers and partners to analyze partner performance and many other aspects of business performance.

For information about installing and setting up Siebel Analytics, see *Siebel Analytics Installation and Configuration Guide*.

Setting Up Siebel PRM

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

To set up Siebel PRM, you go through the following process:

■ **Set up the organization structure.** Organizations are one way to control the data people can see. For example, if a user displays All Contacts view, the contacts in that user's organization appear. Organizations also provide structure to organize relationships with partners through the hierarchy, and provide a way to set up and group partner employees. You must plan the organization hierarchy for your own company and your partner companies.

■ **Create responsibilities.** Responsibilities determine which views people can see. For example, employees have a responsibility that includes My Contacts view, managers have a responsibility that also includes My Team's Contacts view, and higher managers have a responsibility that also includes All Contacts view. You control which responsibilities are available to partners. You should create the appropriate responsibilities, so they are available to assign to users when you add the users.

■ **Create roles.** Roles are not required, but they make Siebel PRM easier to use for both brand owner and partner employees. When you create roles, by default users only see the screen tabs for their roles, which let them access the screens they use most frequently without being distracted by the other screens for their responsibilities. Users also have a task list for their role on their home page, with hyperlinks that take them directly to the views they use most frequently.

■ **Set up access groups and categories.** You use access groups and categories to share master data, such as literature and products, with partners. Access groups are groups of partner companies to which you can assign master data, regardless of their place in the organization hierarchy. Categories are groupings of master data.

■ **Create price lists.** The channel operations manager must create the appropriate price lists for partners, so the channel manager can assign these to new partner companies that are added.

■ **Set up automatic routing of information.** Optionally, you use Siebel Business Process Designer and Siebel Assignment Manager to route data automatically. For example, you can automatically send email to partners when certain application events occur.

■ **Add partner companies and employees.** After you have done the preliminary work of setting up Siebel PRM, you can add partner companies and employees.

■ **Create CHAMP Metrics.** If you are planning to use CHAMP planning to work with your partners, you should create CHAMP metrics.

■ **Set up real time integration.** If you are using Siebel Application Network for real time integration, in addition to the setup tasks described in this chapter, you must perform the setup tasks described in Chapter 3, "Setting Up Application Services Interfaces."

Setting Up the Organization Structure

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

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

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

When you create the organization structure, be aware that it affects visibility in the Pick Partner dialog box. Whenever channel managers use a dialog box that lists partners, the dialog box includes the partners in their own organization and in suborganizations of that organization. However, if the user has access to the All Partners across Organizations view, then the Pick Partner dialog box will include partners in all organizations. This visibility in the Pick Partner dialog box makes it easier for partner managers to work with partner records.

For more information about configuring visibility, see "Configuring Visibility" on page 52.

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

■ Set up the organization hierarchy so channel managers are in organizations of their own, and the partner companies that report to each manager are in organizations that are below that manager's organization. Then, when channel managers use the Pick Partner dialog box, the partner organizations that they manage will be visible.

■ Set up organizations that reflect the structure of your partner programs. For example, you can set up one organization for your resellers, another for your service partners and a third for alliance partners. Channel manager employees would be placed in the organization for which they worked. They would have visibility to the partners belonging to that organization.

■ Set up an organization hierarchy structure where all partners report to the main brand owner organization. Channel manager employees would be a part of this main organization, so they would be able to see the partners when they use the pick partner dialog box.

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

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

When your company adds new partners, channel managers will use the Partner Administration screen to add organizations representing the new partner companies.

For more information on working with organizations using the Group Administration screen, see *Applications Administration Guide* and *Security Guide for Siebel eBusiness Applications*.

For more information about adding a partner organization using the Partner Administration screen, see Chapter 4, "Working With New Partners."

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

Defining Partner Responsibilities

Responsibilities specify which views users can access.

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

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

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

You use the Responsibilities view of the Application Administration screen to create responsibilities.

Setting Up Siebel PRM

In the seed data that is distributed with Siebel PRM, all responsibilities on the Siebel Partner Manager side begin with "Channel," and all responsibilities on the Siebel Partner Portal side begin with "Partner." The responsibilities included in the seed data are shown in Table 1 and Table 2.

Table 1.   Responsibilities in Siebel PRM Seed Data With Views in Siebel Partner Portal

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

Table 2.   Responsibilities in Siebel PRM Seed Data With Views in the Siebel Partner Manager

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

Some views used to display the calendar of the Siebel Partner Portal are different for high interactivity and for standard interactivity:

■ **HI Activity Calendar View.** Used only for high interactivity.

■ **eCalendar Daily View, eCalendar Monthly View, and eCalendar Weekly View.** Used only for standard interactivity.

When you are creating or modifying responsibilities for partners, use the appropriate view, depending on whether partners use standard interactivity or high interactivity.

For more information about responsibilities, see *Security Guide for Siebel eBusiness Applications*.

Administering Roles

Roles are not required, but they can increase the usability of Siebel PRM for both brand owner and partner employees.

When you create roles and assign users to these roles:

- By default, users only see the screen tabs and view tabs for their roles.

- Users can still go to site map and see all screens that they have access to in their responsibility.

- Users have a task list for their role on their home page, with hyperlinks that take them directly to the views they use most frequently.

- Administrators can base personalization on Role. For example, they can hide applets or display messages in salutation applet based on role.

For information about creating roles, associating tasks with roles, and specifying the screen tab and view tab layout for each role, see *Security Guide for Siebel eBusiness Applications*.

Assigning Roles to Brand Owner Employees

You associate brand owner employees with roles using the User Administration screen of Siebel Partner Manager.

To associate a brand owner employee with a role

1 Navigate to the User Administration screen.

2 In the Show drop-down list, choose Employees.

3 In the Employees list, select the record of the Employee you want to associate with a role.

4 In the More Info form, click the show more button.

5 In the More Info form, in the Role field, click the select button.

6 In the Role dialog box, if the role you want is not already in the Role list, click New and use the Add Roles dialog box to select the role.

7 In the Role dialog box, select the role you want to associate with the employee, make sure it is selected as the primary role, and click OK.

Assigning Roles to Partner Employees

You can either assign roles to partner employees yourself, or you can make them available to delegated administrators at your partner companies.

After a partner employee is associated with a role, that employee will see the tasks of that role in the home page applet and will see the tab layouts defined for that role in the Partner Portal.

Making Roles Available to Partner Delegated Administrators

To reduce your company's administrative burden, you can make roles available to partner delegated administrators, so they can assign the roles to partner employees.

For information about how the partner delegated administrators assign roles to partner employees, see the section "Delegated Administration" on page 159.

NOTE: Alternatively, rather than using the procedure that follows, you can make roles available to partner companies by choosing the partner organization in the Organization field of the Role record.

To make roles available to the delegated administrator at a partner company

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the partner company you want to give access to the roles.

4 Click the User Roles view tab.

5 In the User Roles list, click New to add a new record.

The Add Roles dialog box appears.

6 In the Add Roles dialog box, select one or more roles that you want to make available to this company and click OK.

Associating Users with Roles in the Partner Manager

In the Siebel Partner Manager, you can associate your partner employees with their roles using the User Administration screen, as you do brand owner employees. However, if you are working with multiple employees of a single partner company, it is better to use the Partner Administration screen to display all the employees of a partner company.

NOTE: Alternatively, you can associate an employee with a role using the Employee Administration screen.

To associate a partner employee with a role

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the partner company whose employees you want to associate with roles.

4 Click the User Assignments view tab.

5 In the User Assignments list, in the Role field, click the select button.

6 In the Role dialog box, if the role you want is not already in the Role list, click New and use the Add Roles dialog box to select the role.

7 In the Role dialog box, select the role you want to associate with the employee, make sure it is selected as the primary role, and click OK.

Setting Up Access Groups and Categories

Siebel applications include two different types of data:

- **Transactional Data.** Data that users can create, read, edit and delete, such as opportunities, accounts, contacts, and service requests. This data can be assigned to individuals, to groups of individuals (such as a sales team), or to organizations.

- **Master (or Referential) Data.** Data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

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

■ **Access groups.** Groups of parties, such as organizations, divisions, user lists or positions. Individuals, such as contacts or employees, cannot be assigned directly to an access group. If you want to add an individual partner to an access group, you must add the partner to a user list and assign the user list to the access group.

■ **Categories.** Groups of data. For example, you might create a category with your product literature and frequently asked questions about a specific product line.

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

For example, you have partners who sell different product lines that your company manufactures, such as servers and desktop computers. Some partners do not sell all of the products within a given product line; some may sell only the most powerful servers or the low-priced desktops. In this case, you can create categories for the product lines you sell, and also create categories for each individual product that you sell, for each specific model of server and desktop computer. Then you would associate sales literature, training courses, and other information about an entire product line with the appropriate category, and information about an individual product with the appropriate category.

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

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

For more information about working with categories and access groups, see *Security Guide for Siebel eBusiness Applications* and *Siebel eSales Administration Guide*.

Creating Price Lists

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

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

When you first set up Siebel PRM, your channel operations manager has to set up the appropriate price lists for your partners. The channel managers will be able to assign these price lists to new partner companies that they add.

For more information about setting up price lists, see *Pricing Administration Guide*.

Setting Up Automatic Routing of Information

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

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

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

For information about the workflows included in Siebel PRM's sample data, see "Activating Workflows" on page 32.

For more information about defining rules to enable automatic email notification and customizing notification messages, see *Siebel Business Process Designer Administration Guide*.

For more information creating rules in Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

Adding Partner Companies and Employees

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

For information about adding new partner companies and employees, see Chapter 4, "Working With New Partners."

Creating CHAMP Metrics

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

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

In your ongoing work with your partners, you will create and execute initiatives and plans that will be evaluated using these metrics.

For more information about CHAMP planning, see Chapter 5, "CHAMP Planning."

Configuring Visibility

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

■ Configuring visibility of pop-up or pick applets

■ Configuring visibility of child objects in views

■ Letting users change primary on visibility teams, including position and organization based teams

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

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

About Visibility Enhancements in Siebel PRM

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

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

For example, in other Siebel applications, if you navigate to the Accounts screen, select an Account record, and then click the Contacts view tab, you will see all the contacts that are associated with that account. In the Siebel Partner Portal, the partner will see contacts associated with the Account only if they are in the partner's organization.

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

■ Opportunity screen: Contacts, Quotes, Revenues, Products, Activities

■ Account screen: Opportunity, Quotes, Orders, Revenues, Activities

Siebel PRM also has enhancements that allow partners to collaborate with other partner companies by assigning data to positions or organizations in other partner companies. For more information, see Chapter 11, "Partner-to-Partner Collaboration."

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

Configuring Visibility of Pop-Up or Pick Applets

Pop-up visibility determines what data will be shown when a pop-up pick applet is displayed, for example, when a user associates a contact with an account, or adds a sales representative to the sales team.

Pop-up visibility is usually set using the Popup Visibility Type property of the business component object in Siebel Tools. When pop-up visibility is set in this way, any pop-up based on that business component will show the same data for all users.

There are often circumstances where you need greater flexibility when determining what data should be shown in pop-up pick applets. For example:

■ Most employees of your company only need to see positions for your organizations when they are assigning a sales representative to the sales team.

■ Partner Managers need to see positions for your organization, as well as the partner organizations that they manage.

There are also many scenarios where your partners should have more restrictive visibility than your employees.

In order to meet this business requirement, Siebel applications have added the following three capabilities that let the developer override the visibility set in the Business Component Popup Visibility Type property at the business component level in favor of another setting. The developer can:

■ Set Visibility of the Pick-List Object

■ Use the Visibility Auto All Property

■ Use the Special Frame Class and User Property

Setting Visibility of the Pick List Object

Developers can override the visibility set at the business component level by setting a different visibility type on the Pick List object, in the Visibility Type property.

When you do this, you override the visibility set at the business component in a specific instance of that business component, but for all users of that instance.

For example, you may want partners to be able to add new fund requests and associate those fund requests with campaigns in which they participate. However, you want partners to see only campaigns to which they have access. You can configure a special picklist for this use, and set the visibility on that picklist to Sales Rep, so that partners can only select from accessible campaigns when associating to a fund request.

Using the Visibility Auto All Property

For both Pick List Visibility Type and Business Component Pop-up Visibility Type there is a new property called Visibility Auto All that can be used to override the visibility type property.

This property will check the current user's responsibility to see if it includes the All Across Organizations view based on the same business component. If the view is found, this visibility type will be overridden and the user will get All visibility on the object in question. Otherwise, the visibility type will not be overridden.

For example, if the pop-up visibility on the Opportunities business component is set to Organization with Auto All set to true, most users will see all opportunities for their own organization in an Opportunity pick applet. Users who also have access to the All Opportunities Across Organizations view will see all available Opportunities regardless of organization.

This property makes visibility consistent across views and pop-up pick applets.

This property can override any other visibility type, including Sales Rep, Manager, Organization, and so on. In addition to the Business Component and Pick List properties, this property can be set on the Link object as well.

This property is often used for executives or administrative users, who would usually have access to all of the data in your Siebel Application.

Using the Special Frame Class and User Property

The developer can use a special frame class and user property to set visibility for a pick applet on the applet object based on which application is being used.

For example, if users are running Siebel Sales, the Pick Positions applet for the Sales Team will show positions only for the user's organization. If users are running Siebel Partner Manager, the applet shows the positions for the user's own organization and for the suborganizations (or child organizations) of that organization, so that the users will be able to select positions for the partners they manage.

In order to override the pop-up visibility set at the business component level, the developer must do the following:

■ Change the frame class of the applet to CSSSWEFrameListVisibilityPick

■ Add an applet user property called Override Visibility, with the following values:

■ Name: Override Visibility: [Application Name]

■ Value: [Visibility Type] where the developer can choose from the standard visibility types

Configuring Visibility of Child Objects in Views

Siebel applications use a number of visibility types to determine what data will be shown on each view.

For example, the My Opportunities view uses Sales Rep visibility; it shows the opportunities for which the user is on the Sales Team. If you have access to that Opportunity, you will also be able to see its child objects; for example, you will be able to see Activities, Contacts, and Quotes that are associated with that Opportunity.

Sometimes it is important to be able to limit the visibility to the child objects. For example, if you are sharing Opportunities with your partners, you might want to show them any Activities, Contacts and Quotes that they have added for that Opportunity, but not ones that you have added.

In order to meet this business requirement, Siebel applications have added two capabilities.

A visibility type can be applied to an applet as a property of the View Web Template Item, which is where applets are associated with views. The auto-all property can not be applied to the web template item. For parent-child views such as Opportunity/Contacts, placing visibility on the Contacts applet on the View Web Template Item object will change the visibility on the Contacts applet when it is used in this view. Using this method, you can apply visibility to the applet in the context of a specific view, but reuse the applet with no or other visibility applied in another view.

Alternatively, visibility can be set on the link object, and it will be applied in addition to the visibility set at the view level. For parent-child views (such as Opportunity/Contacts) a visibility type can be set as a property on the Link object that links the Opportunity and Contact business components for this view. In addition, the Auto All property can be set on the Link object to override the visibility type set on the Link. For example, if the Visibility on the link is Sales Rep, but Auto All is true, administrative users will still see all records in the database. Note that once visibility is applied to the link it will be applied wherever the link is used throughout the application.

Allowing Users to Change Primary on a Visibility Team

Siebel applications use visibility teams to determine what data will be displayed in different views. There are both position and organization based visibility teams.

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

Both position and organization based visibility teams have primary members.

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

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

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

- Name: MVG Set Primary Restricted: [visibility mvlink name]

- Value: TRUE or FALSE

Siebel Partner Web Services

The webMethods products included with Siebel Partner Web Services and Siebel Tools for Partner Web Services are licensed only for use in combination with the Siebel programs, such that communications that use the webMethods products must include communication with a Siebel Program. Application-to-application integration using the webMethods products included with Siebel Partner Web Services and Siebel Tools for Partner Web Services that does not include communication with a Siebel program is prohibited.

For more information about Siebel Partner Web Services, see the webMethods documentation for the server infrastructure and adapters.

Installing Siebel Partner Web Services Servers

Begin the installation process by installing the core server components of Siebel Partner Web Services, which include:

■ webMethods Integration Server

■ webMethods Trading Networks Server

■ webMethods Business Integrator Service Package

Install these servers in the order listed above.

Brief instructions for installing on each platform are given below. For more information, see the *webMethods Integration Server Installation Guide* in the third-party documentation section of the *Siebel Bookshelf*.

Installing Under MS Windows

For the Windows platform, the installations for the webMethods Server processes are located on the *Windows Server Ancillary Programs (CD 3 of 3)*:

To install Siebel Partner Web Services Servers under MS Windows

1 Install the webMethods Integration Server by running the executable `IntegrationServer46_en_US.exe`, located in the directory `Thirdparty\webmethods\<lang>\integration_server\server`.

■ If you are installing at your site, you will be prompted for your License Key, and you should your Hub license key.

- If your partners are installing the server at their sites, they will be prompted for a license key, and they should enter the Partner license key.

2 Install the Trading Networks server by running the executable `TNServer46_en_US.exe` in the directory `Thirdparty\webmethods\<`*lang*`>\trading_networks\server`.

3 Install the Business Integrator Service Package by running the executable `BusinessIntegrator_46_Services_en_US.exe` in the directory `Thirdparty\webmethods\<`*lang*`>\business_integrator directory`.

Installing on a Solaris Platform
For the Solaris Platform, the webMethods server processes are located on *Solaris Server Ancillary Programs (CD 2 of 2)*.

The installation process and directory structure for Solaris are the same as for the Windows platform. However, the installation files are JAR files instead of Windows executables.

Installing on an AIX Platform
For the AIX Platform, the installations for the webMethods server processes are located on the *AIX Server Ancillary Programs (CD 2 of 2)*.

The installation process and directory structure for AIX is the same as for the Windows platform. However, the installation files are JAR files instead of Windows executables.

Siebel Tools for Partner Web Services

The webMethods products included with Siebel Partner Web Services and Siebel Tools for Partner Web Services are licensed only for use in combination with the Siebel programs, such that communications that use the webMethods products must include communication with a Siebel Program. Application-to-application integration using the webMethods products included with Siebel Partner Web Services and Siebel Tools for Partner Web Services that does not include communication with a Siebel program is prohibited.

For more information about Siebel Tools for Partner Web Services, see the webMethods documentation for the developer product and the administrator consoles for both webMethods Trading Networks and webMethods Business Integrator.

Installing Siebel Tools for Partner Web Services

Siebel Tools for Partner Web Services includes the following components:

- webMethods Developer

- webMethods Trading Networks Console

- webMethods Business Integrator

Brief instructions for installing on each platform are given below. For more information about installation, see the *webMethods Installation Guide* in the directory webmethods\installer in the third-party documentation section of the *Siebel Bookshelf*.

Installing Under MS Windows

For the Windows platform, the installation for Siebel Tools for Partner Web Services is on *Web Client Ancillary Programs (CD 2 of 2)* in the directory Thirdpty\webmethods\<lang>\tools\windows.

To install Siebel Tools for Partner Web Services under MS Windows

1 Copy the following files to a temporary writable directory:

   a install.bat

   b webMethodsimage.zip

   c webMethodsInstaller461.exe

2 Execute install.bat.

Installing on a Solaris Platform

For the Solaris platform, the installation for Siebel Tools for Partner Web Services is located on *Web Client Ancillary Programs (CD 2 of 2)* in the directory \Thirdpty\webmethods\<lang>\tools\solaris.

To install Siebel Tools for Partner Web Services on a Solaris platform

1 Copy the following files to a temporary writable directory:

   a webMethodsImage-Sol.jar

   b webMethodsInstaller461.jar

2 Enter the following command:

```
java -jar webMethodsInstaller461.jar -launchImage
webMethodsImage-Sol.jar
```

Installing on an AIX Platform

For the AIX platform, the installation for Siebel Tools for Partner Web Services is located on *Web Client Ancillary Programs (CD 2 of 2)* in the directory \Thirdpty\webmethods\<lang>\tools\aix.

To install Siebel Tools for Partner Web Services on an AIX platform

1 Copy the following files to a temporary writable directory:

   a webMethodsImage-Aix.jar

   b webMethodsInstaller461.jar

2 Enter the following command:

```
java -jar webMethodsInstaller461.jar -launchImage
webMethodsImage-Aix.jar
```

Troubleshooting Installation

During the installation of Siebel Tools for Partner Web Services, you should not be prompted for a login or a license key.

If you are prompted for a login or license key, then the installer is having trouble locating the webMethods installation image file (specified with the -launchImage parameter).

If this occurs, when you execute the installer, try specifying the exact directory to which you copied the installation image files.

Setting Up Application Services Interfaces

3

This chapter discusses how to set up Applications Services Interfaces, which allow integration of Siebel PRM with other CRM systems. It discusses mandatory initial setup, and it documents workflows used by the ASIs.

About Application Services Interfaces

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

Two features of Siebel PRM use ASIs:

■ **Opportunity Transfer.** You should use this feature if some of your partners have their own CRM systems and do not want to use the Siebel Partner Portal to share opportunities. Opportunity transfer synchronizes your Siebel database with the Partner's CRM system. You can transfer Opportunities and the Contacts, Revenues, Notes, and Activities associated with them to your partner's CRM system, or you can query the partner's system to transfer their opportunities to your Siebel system. For more information about how opportunity transfer can be used in your business, see Chapter 7, "Managing Sales."

■ **Shopping Cart Transfer.** You should use this feature if your company wants to make sales through your own Web site but wants distributors or other partners to fulfill the orders. The customer can use Siebel eSales on your Web site to create a shopping cart. Then the customer can transfer the shopping cart to a partner's site for fulfillment. For more information about how shopping cart transfer can be used in your business, see Chapter 10, "Managing Partner Commerce."

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

■ **Setting Up ASIs.** You must set up the ASIs shipped with Siebel PRM before they can be used. This section provides the procedures that you must perform to set up these ASIs.

■ **ASI Workflows.** You may want to modify the way that Siebel PRM invokes its ASIs to customize it for your business. This section documents the workflows that you may want to modify to change the ways that ASIs are invoked.

Set Up of ASIs

This section covers:

■ Setting up opportunity transfer

■ Setting up shopping cart transfer

After following the specific instructions to set up either of these, you must follow the general instructions for setting up ASIs, which applies to both of them.

Setting Up Opportunity Transfer

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

■ Set up the Web services

■ Assign the partner a port

■ Do the general setup for ASIs

Setting Up Web Services for Opportunity Transfer

To set up the Web services, you must log into Siebel Partner Manager as a user with system administrator privileges. Then you must set up outbound Web services and set up inbound Web services.

To set up outbound Web services

1 From the application-level menu, choose View > Site Map > Web Service Administration > Outbound Web Service.

2 In the Outbound Web Service list, create a query to display all records with "External Opportunity*" in the Name field.

3 Select Active in the Status field of all of these records to activate these Web services.

4 Select the record with the name External Opportunity Create.

5 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Value
Name	Enter a name for the port, such as Transfer opportunity.
Port Type	Select External Opportunity Create.
Transport	Select HTTP.
Address	Specify the address or URL of the target system you are communicating with.
	If you are communicating with another Siebel instance, enter the following:
	`http://<machine_address>/eai_<lang>/ start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName =<login for that machine>&Password=<password for that machine>`
	For the values in angle brackets, use the actual values for your system.
Protocol	Select SOAP_RPC.
Comment	Enter a comment for your own use.

6 In the Operation Bindings list, click New, and enter the following values in the fields of the new record.

Field	Value
Operation Name	Use the picklist to select ExternalOpportunityCreateExecute.
Binding Property	Namespace
Binding Value	http://siebel.com/asi/

7 In the same way, define the service port for External Opportunity Update:

a In the Outbound Web Service list, select External Opportunity Update.

   b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that the value for port type is External Opportunity Update.

   c Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create except that the value for the Operation Name is *ExternalOpportunityUpdateExecute*.

8 In the same way, define the service port for External Opportunity Query:

   a In the Outbound Web Service list, select External Opportunity Query.

   b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that the value for port type is External Opportunity Query.

   c Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create except that the value for the Operation Name is *ExternalOpportunityQueryExecute*.

9 In the same way, define the service port for External Opportunity Update Response:

   a In the Outbound Web Service list, select External Opportunity Update Response.

   b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that the value for port type is External Opportunity Update Response.

   c Add a new record in the Operation Bindings list with the same values you entered for External Opportunity Create except that the value for the Operation Name is *ExternalOpportunityUpdateResponseExecute*.

NOTE: Users must activate the workflows before they set up the Inbound Web services, or else they will not be able to select the workflow under the Implementation Name in the Type field. For more information, see "Activate Workflows" on page 77.

To set up inbound Web services

1 From the Show drop-down list, select Inbound Web Service.

2 In the Inbound Web Service list, create a query to display all records with "Siebel Opportunity*" in the Name field.

3 Select Active in the Status field of all of these records to activate these Web services.

4 Select the record with the name Siebel Opportunity Create.

5 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Value
Name	Enter a name for the port, such as Receive opportunity.
Type	Click the select icon. In the dialog box, click New and enter the following values in the new record: ■ Implementation Type: Workflow Process ■ Implementation Name: Select Opportunity Sharing Siebel Create ■ Name: Siebel Opportunity Create After creating this record, select it as Type.
Business Service	Entered automatically when you select the Type.
Transport	Select HTTP.
Address	Enter `http://<your_siebel_server_address>/eai_<lang>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=<login for that machine>&Password=<password for that machine>` For the values in angle brackets, use the actual values for your system.
Bindings	Select SOAP_RPC.
Comment	Enter a comment for your own use.

6 In the Operations list, click New, and enter the following values in the fields of the new record.

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

7 In the same way, define the service port for Siebel Opportunity Update:

a In the Inbound Web Service list, select Siebel Opportunity Update.

b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that you should use the following values when you create the new record in the picklist for the Type field:

  ❑ Implementation Type: Workflow Process

  ❑ Implementation Name: Select Opportunity Sharing Siebel Update

  ❑ Name: Siebel Opportunity Update

c Add a new record in the Operations list with the same values you entered for External Opportunity Create except that the Name in the Operations list is *ExternalOpportunityUpdateExecute*.

8 In the same way, define the service port for Siebel Opportunity Query:

a In the Inbound Web Service list, select Siebel Opportunity Query.

b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that you should use the following values when you create the new record in the picklist for the Type field:

  ❑ Implementation Type: Workflow Process

  ❑ Implementation Name: Select Opportunity Sharing Siebel Query

  ❑ Name: Siebel Opportunity Query

c Add a new record in the Operations list with the same values you entered for External Opportunity Create except that the Name in the Operations list is *ExternalOpportunityQueryExecute*.

9 In the same way, define the service port for Siebel Opportunity Update Response:

    a In the Inbound Web Service list, select Siebel Opportunity Update Response.

    b Add a new record in the Service Ports list with the same values you entered for External Opportunity Create except that you should use the following values when you create the new record in the picklist for the Type field:

        ❑ Implementation Type: Workflow Process

        ❑ Implementation Name: Select Opportunity Sharing Receive Update Response

        ❑ Name: SiebelOpportunityUpdateResponse

    c Add a new record in the Operations list with the same values you entered for External Opportunity Create except that the Name in the Operations list is *ExternalOpportunityUpdateResponseExecute*.

Assigning the Partner a Port

To set up real-time opportunity transfer, in addition to setting up inbound and outbound Web services, you must assign the partner a port.

To assign the partner a port

1 From the application-level menu, choose View > Site Map > Partner Administration > Registered Partners.

2 In the Partners list, select the partner company.

3 Click the Integration view tab.

4 In the Integration list, click New, and use the picklist to select one of the ports you created for the Outbound Web Services list.

5 Continue to create a new record in the Integration list for each of the Ports you created in the Outbound Web Services list that belongs to this partner.

Additional Setup Tasks

To finish setting up opportunity transfer, you must also complete the tasks described in "General Setup for ASIs" on page 77.

Setting Up the Partner

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

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

In the External Opportunity Create web service, you must create a separate Service Port for each partner, as described in "Setting Up Web Services for Opportunity Transfer" on page 65. You must also repeat this process for the rest of the outbound web services.

Then, when you use the Partner Administration screen to assign the partner a port, as described in "Assigning the Partner a Port" on page 70, you must make sure to add the port with each partner's URL to that partner's integration profile.

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

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

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

Setting Up Shopping Cart Transfer

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

■ Set up the Web services

■ Assign the partner a port

■ Change the Partner Portal configuration file

■ Assign Global Product Identifiers

■ Check Setup of ATP

■ Do the general setup for ASIs

Setting Up Web Services for Shopping Cart Transfer

To set up the Web services, you must log into Siebel Partner Manager as a user with system administrator privileges. Then you must set up outbound Web services and set up inbound Web services.

To set up outbound Web services

1 From the application-level menu, choose View > Site Map > Web Service Administration > Outbound Web Service.

2 In the Outbound Web Service list, create a query to display the records with "External Shopping Cart Create" in the Name field.

3 Select Active in the Status field of this record to activate this Web service.

4 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Value
Name	Enter a name for the port, such as Transfer Cart.
Port Type	Select External Shopping Cart Create.
Transport	Select HTTP.
Address	Specify the address or URL of the target system you are communicating with.
	If you are communicating with another Siebel instance, enter the following:
	`http://<machine_address>/eai_<lang>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=<login for that machine>&Password=<password for that machine>`
	For the values in angle brackets, use the actual values for your system.
Binding	Select SOAP_RPC.
Comment	Enter a comment for your own use.

5 In the Operation Bindings list, click New, and enter the following values in the fields of the new record.

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

NOTE: Users must activate the workflows before they set up the Inbound Web services, or else they will not be able to select the workflow under the Implementation Name in the Type field. For more information, see "Activate Workflows" on page 77.

To set up inbound Web services

1 From the Show drop-down list, select Inbound Web Service.

2 In the Inbound Web Service list, create a query to display the record with "Siebel Shopping Cart Create" in the Name field.

3 Select Active in the Status field of this record to activate this Web service.

4 Select the record with the name Siebel Shopping Cart Create.

5 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Value
Name	Enter a name for the port, such as Receive Cart.
Type	Click the select icon. In the dialog box, click New and enter the following values in the new record: ■ Implementation Type: Workflow Process ■ Implementation Name: Select *Transfer Cart Inbound Receive Process* ■ Name: Siebel Shopping Cart Create After creating this record, select it as Type.
Business Service	Entered automatically when you select the Port Type.
Transport	Select HTTP.
Address	Enter `http://<your_siebel_server_address>/eai_<lang>/ start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName =<login for that machine>&Password=<password for that machine>` For the values in angle brackets, use the actual values for your system.
Binding	Select SOAP_RPC.
Comment	Enter a comment for your own use.

6 In the Operations list, click New, and enter the following values in the fields of the new record.

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

Assign the Partner a Port

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

To assign the partner a port

1 From the application-level menu, choose View > Site Map > Partner Administration > Registered Partners.

2 In the Partners list, select the partner company.

3 Click the Integration view tab.

4 In the Integration list, click New, and use the picklist to select the port you created in the Outbound Web Services list.

Change the Partner Portal Configuration File

Finally, to enable shopping cart transfer, you must change the configuration file for the Siebel Partner Portal.

To change the parameters to allow shopping cart transfer

1 Use any text editor to open the configuration file for the Siebel Partner Portal, which is the file < installation directory > \siebsrvr\bin\ < lang > \scw.cfg.

2 In the [InfraShoppingService] section of the file, edit the parameter EnableTransferCart so it says:

```
EnableTransferCart=TRUE
```

3 Change this parameter in the Server Administration screen:

   a From the application-level menu, choose View > Site Map > Server Administration > Components.

   b Click the Component Parameters view tab.

   c In the Components list, search for eChannel Object Manager in the Name field.

   d In the Component Parameters list, find the parameter *EnableTransferCart* and select TRUE as its value.

4 Restart your server.

Assigning Global Product Identifiers

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

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

Before using Shopping Cart Transfer, you must make sure that the brand owner and partners have defined the relevant products in their respective applications. This is generally done as an offline batch process.

Checking Setup of ATP

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

Alternatively, you can modify the workflows so they do not use the ATP step. For information about modifying workflows, see "Shopping Cart Transfer Workflows" on page 101.

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

To set up ATP functionality for testing purposes

1 Make sure that you are using the ATP ASI Test service for the ATP Web Service:

   a From the application-level menu, choose View > Site Map > Web Service Administration > Outbound Web Service.

   b Find the web service named *External ATP Check*.

   c Change the value for Address to *ATP ASI Test*.

   d Change the value for Transport to *Local Business Service*.

   e Change the value for Binding to *Property Set*.

   f Create a new record in the Operation Bindings list with Operation Name = *Execute*, Bind Property = *Namespace*, and Binding Value = *http://siebel.com/asi/*.

2 If you have tried to run this service before, you must restart the server.

Additional Setup Tasks

To finish setting up shopping cart transfer, you must also complete the tasks described in "General Setup for ASIs" on page 77.

General Setup for ASIs

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

■ Activate Workflows

■ Assign DUNS Numbers

Activate Workflows

For either opportunity transfer or shopping cart transfer, you must activate the workflow processes used for real-time integration.

NOTE: For testing, this must be done on the second system as well.

To activate Workflows

1 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.

2 In the Workflow Processes list, use a query to find all processes where the Group field has the value PRM ASI.

3 Activate each of these workflow processes that has the status Inactive:

    a Select the workflow process record.

    b Click Revise.

       A copy of the workflow process record is created with a status of In Progress. The copy is automatically selected.

    c Click Activate.

    d Verify that the Status is Active.

4 When you are finished activating workflow processes, restart the server.

Assign DUNS Numbers

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

Though it is recommended that you use the DUNS number, you can use any unique identification number that you and your partners agree on.

NOTE: You should also assign DUNS numbers for Accounts that you will be transferring back and forth to make sure that both systems are referring to the same account. Alternatively, the inbound workflows can be changed to search for the Account Name instead of the DUNS # when checking to see if the Account already exists.

To set DUNS numbers

1 Set the DUNS number for your own company:

   a Navigate to the Application Administration screen, System Preferences view.

   b Search for a preference named *Internal DUNS Number* and enter its value.

2 Set the DUNS number for all partner companies that will use ASIs:

   a Navigate to the Partners screen.

   b In the Partners list, select the record for the partner company.

   c In the More Info form, enter the value in the DUNS# field.

NOTE: The DUNS numbers that your partners use must match the DUNS numbers you use. The DUNS number you enter for a partner in your system must match the DUNS number that partner uses for itself in its system. The DUNS number you enter for your own company in your own system must match the number the partner uses for your company in its system.

ASI Workflows

This section documents the workflow processes that are used to invoke the ASIs for opportunity transfer and shopping cart transfer. It is not necessary to modify these workflows, but you can modify them to suit your business model.

Opportunity Transfer Workflows

The workflow processes described in this section are associated with opportunity transfer.

They are used for the following functions:

■ Transferring an Opportunity

■ Updating an Opportunity

■ Requesting an Opportunity Update

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

Workflows to Transfer an Opportunity

As an illustration of opportunity transfer, we will assume the brand owner clicks the Transfer button to transfer the opportunity to a partner. The following workflows are invoked in the following order:

■ **Opportunity Sharing Pick Partner.** When the brand owner or partner clicks the Transfer button on the Transfer Opportunity Child Applet, it calls the Opportunity Sharing Pick Partner workflow. This workflow retrieves the partner id of the partner and passes it on to the Opportunity Sharing External Create workflow, which Opportunity Sharing Pick Partner workflow calls as a subprocess.

■ **Opportunity Sharing External Create.** This workflow captures the object id of the opportunity that is being transferred. It changes the opportunity's transfer status to Transfer In Progress. Then it creates an internal key that System A will use to reference the opportunity, and it passes the opportunity id, opportunity key, and the partner id to the workflow Build Siebel Message, which it calls as a subprocess.

■ **Opportunity Sharing Build Siebel Message.** This workflow uses the opportunity id to gather all the necessary information on the opportunity and put it into a Siebel message. Opportunity Sharing Build Siebel Message also collects the Partner information and System A's Organizational information, and it adds that to the Siebel message. This Siebel message is passed back to Opportunity Sharing External Create which transfers it to system B and waits for a response.

■ **Opportunity Sharing Siebel Create.** System B receives the Siebel message and runs the Opportunity Sharing Siebel Create workflow. Opportunity Sharing Siebel Create first inserts the opportunity's account by calling **PRM ANI Inbound Create Account**. It then inserts the Opportunity's information. If this is successful, it creates a key that System B will use to reference the opportunity, updates the Transfer Status on system B to Transfer Successful, and stores System A's key. It then adds System B's key and the current transfer status to the Siebel message. This message is sent back to System A.

■ **Opportunity Sharing Receive Create Response.** Once System A receives the response, it calls the Opportunity Sharing Receive Create Response. This workflow updates the status of the transfer based on the response. It also stores System B's key.

Workflows to Update an Opportunity

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

■ **Opportunity Sharing External Update.** This workflow is called when the brand owner clicks the Update button on the Transfer Opportunity Child Applet. Opportunity Sharing External Update calls Opportunity Sharing Set Update Status.

■ **Opportunity Sharing Set Update Status.** This workflow first calls Opportunity Sharing Inbound or Outbound.

■ **Opportunity Sharing Inbound or Outbound.** This workflow figures out whether this opportunity was originally sent to System B from System A or was originally sent to System A by System B. Was this opportunity originally an outbound opportunity or an inbound opportunity? It also retrieves System B's key and the partner id of who the opportunity was sent to. It passes this information back to Opportunity Sharing Set Update Status. Opportunity Sharing Set Update Status updates the Transfer Status to Update Pending. Then it calls Opportunity Sharing Build Siebel Message passing the opportunity id, system A and system B's keys, and the partner id. (Depending on your setup, this workflow might not be necessary. A call to this workflow can be replaced with a Siebel operation that queries the ANI Keymap business component.)

■ **Opportunity Sharing Create Siebel Message.** This workflow creates a Siebel message and passes it back to Set Update Status. Then set Update Status passes the Siebel message back up to External Update. External Update transfers the Siebel message to System B.

■ **Opportunity Sharing Siebel Update.** System B receives the Siebel message and runs Opportunity Sharing Siebel Update. Opportunity Sharing Siebel Update checks to see if it needs to insert the opportunity's account again, by calling **PRM ANI Inbound Create Account**. Then it updates the Opportunity's information. If this is successful, it updates the Transfer Status on system B to Update Successful. Then it then adds the current transfer status to the Siebel message, and it sends this message is sent back to System A.

■ **Opportunity Sharing Receive Update Response.** Once System A receives the response, it calls the Opportunity Sharing Receive Update Response workflow, which updates the status of the transfer based on the response.

Workflows to Receive an Update of Opportunity

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

■ **Opportunity Sharing External Query.** When the brand owner calls the Receive Update button on the Transfer Opportunity Child Applet, it calls the Opportunity Sharing External Query workflow. External Query first uses the **Opportunity Sharing Inbound or Outbound** workflow to determine whether this was originally an inbound or an outbound opportunity, as described earlier. Then Opportunity Sharing External Query takes that information and creates a Siebel message with System A's and System B's keys. It then transfers this Siebel message to system B.

■ **Opportunity Sharing Siebel Query.** When System B receives the Siebel message, it runs the Opportunity Sharing Siebel Query workflow. Opportunity Sharing Siebel Query makes sure the opportunity exists and then calls Opportunity Sharing Set Update Status.

■ **Opportunity Sharing Set Update Status.** This workflow first calls the **Opportunity Inbound or Outbound workflow**, which does the following: determines whether this was originally an outbound opportunity or an inbound opportunity, as described earlier, retrieves System A's key and the partner id of the employee the opportunity was sent to, and passes this information back to Opportunity Sharing Set Update Status. Then Opportunity Sharing Set Update Status updates the Transfer Status to Update Pending. Then it calls the **Opportunity Sharing Build Siebel Message** workflow, to create a message containing the opportunity id, system B and system A's keys, and the partner id. After the Siebel message is passed back to Opportunity Sharing Set Update Status, Opportunity Sharing Set Update Status passes the Siebel message back up to Opportunity Sharing External Update. **Opportunity Sharing External Update** transfers the Siebel message to System A.

■ **Opportunity Sharing Siebel Update.** Once System A receives the response, it calls Opportunity Sharing Siebel Update. This workflow returns a Siebel message, which Opportunity Sharing External Query transfers back to System B.

■ **Opportunity Sharing Receive Update Response.** System B receives the Siebel message and calls Receive Update Response, which will update the status of the transfer based on the response.

Update of the Status Field by These Workflows

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

■ **Blank.** The opportunity has never been transferred to a partner. In this case, only the Transfer button is active. An update cannot be sent or received until after the opportunity has been transferred.

■ **Transfer Pending.** The opportunity has been transferred to a partner, but the acknowledgement from the partner has not been received yet. In this case, none of the transfer buttons is active.

■ **Transfer Successful.** The opportunity has been transferred to a partner, and the acknowledgement indicates that the transfer went through. In this case, only send update and receive update are active. Once an opportunity has been transferred successfully, it cannot be transferred again.

■ **Transfer Unsuccessful.** The opportunity has been transferred to a partner, and the acknowledgement indicates that the transfer did not go through. This may be because the connection timed out, the opportunity already exists on the other system, the source organization is not listed as a partner in the other system, or there was an exception with the insert step. In this case, the transfer button is the only button that is active. The user can try again to transfer the opportunity, either to the same partner or a different one.

■ **Update Pending.** The send update or receive update process is underway, but no response has yet been received. In this case, none of the buttons is active.

■ **Update Successful.** The send update or receive update process completed successfully. In this case, the send update and receive update buttons are active.

■ **Update Unsuccessful.** The send update or receive updated process failed, based on the return message from the partner's system. This may be because the connection timed out, the opportunity does not exist on the other system, or there was an exception with the update step. In this case, the send update and receive update buttons are active.

Opportunity Sharing Build Siebel Message

The Opportunity Sharing Build Siebel Message workflow process is shown in
Figure 3.
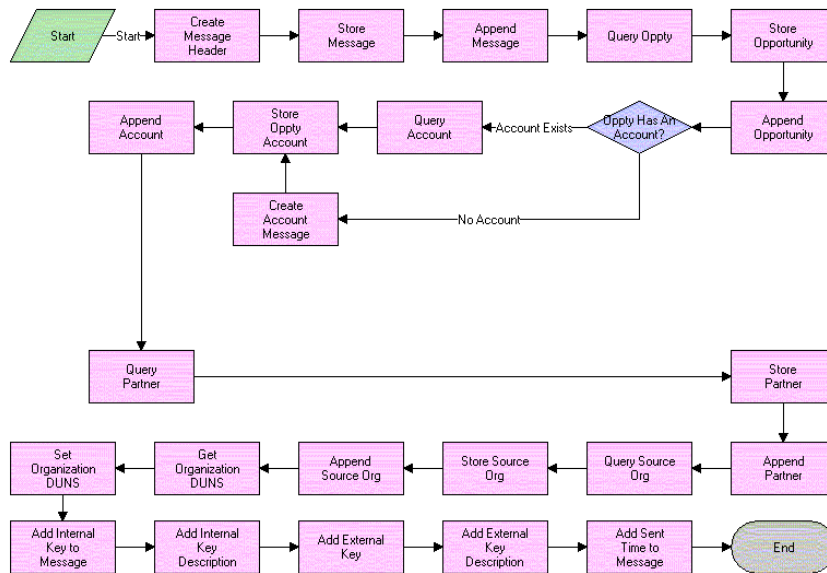
Figure 3.   Opportunity Sharing Build Siebel Message Process

When this workflow is called, the following events happen:

■ **Create Message Header.** Creates an empty message header that will be added to
the Siebel message. This header will eventually contain the transfer information.

■ **Store Message Header/Append Message.** Creates an empty Siebel message using
the ANI Opportunity Message (PRM ANI) format and appends the message
header to it.

■ **Query Oppty.** Queries the database for the opportunity matching the object id.
Also returns the account id for the account of this opportunity.

■ **Store Oppty & Append Oppty.** Adds the opportunity to the Siebel message.

- **Oppty Has An Account.** Checks to see if the account id is null. If it is, the workflow does not need to query for an account.

- **Create Account Message.** If there is no account for this opportunity, creates an empty account property set to follow the ANI Opportunity Message (PRM ANI) format for the Siebel message.

- **Query Account.** If there is an account for this opportunity, returns the account information.

- **Store Oppty Account/Append Account.** Adds the account information to the Siebel message.

- **Query Partner/Store Partner/Append Partner.** Queries for the partner the opportunity is being sent to and appends that information to the Siebel message.

- **Query Source Org/Store Source Org/Append Source Org.** Queries for the source organization and appends that information to the Siebel message.

- **Get Organization DUNS/Set Organization DUNS.** Retrieves the source organization's DUNS number and adds it to the Siebel message.

- **Add Internal Key.** Adds the internal key to the Siebel message.

- **Add Internal Key Description.** Adds the internal key description to the Siebel message.

- **Add External Key.** Adds the external key to the Siebel message.

- **Add External Key Description.** Adds the external key description to the Siebel message.

- **Add Sent Time to Message.** Adds the current timestamp to the Siebel message.

Opportunity Sharing External Create

This Opportunity Sharing External Create workflow process is shown in Figure 4.
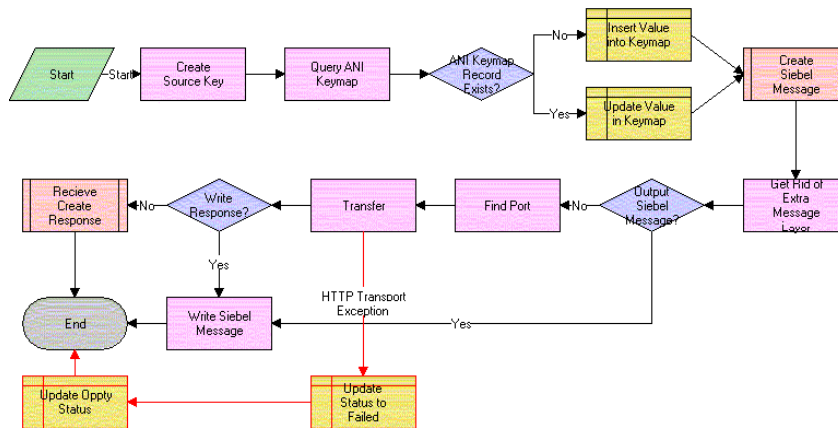
Figure 4.   Opportunity Sharing External Create Process

When this workflow is called, the following events happen:

■ **Create Source Key.** Generates an internal key from the process property internal key description. Currently internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this as a subprocess.

■ **Query ANI Keymap.** Searches for a transfer record for this opportunity in ANI Keymap, the bus comp that stores all the transfer information.

■ **ANI Keymap Record Exist.** Checks to see if the number of transfer records for this opportunity is greater than zero—that is, does a transfer record already exist for this opportunity?

■ **Insert Value into Keymap.** If a transfer record for this opportunity does not already exist, creates a new transfer record for this opportunity.

■ **Update Value in Keymap.** If a transfer record for this opportunity already exists, updates the transfer status to Transfer In Progress.

- **Create Siebel Message.** Calls Opportunity Sharing Build Siebel Message, passing in the internal key, internal key description, partner id, and object id. Returns a Siebel message.

- **Get Rid of Extra Message Layer.** Removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.

- **Output Siebel Message.** Checks to see if the value of the process property "Write Orig File" is Y or N.

- **Find Port.** Finds the web service port for the partner the opportunity is being sent to.

- **Transfer.** Sends the opportunity to the other system.

- **Update Status to Failed.** If the transfer step returns an exception, updates the transfer status of the opportunity to Transfer Unsuccessful.

- **Write Response.** Checks to see if the value of the process property "Write Response to File" is Y or N.

- **Write Siebel Message.** If Write Orig File is Y, this step writes the pretransfer Siebel message to an xml file. If Write Response to File is Y, this step writes the post-transfer Siebel message to an xml file.

- **Receive Create Response.** Calls the subprocess Oppty Sharing Receive Create Response, passing it the Siebel message received from the transfer.

Opportunity Sharing External Query

The Opportunity Sharing External Query workflow process is shown in Figure 5.
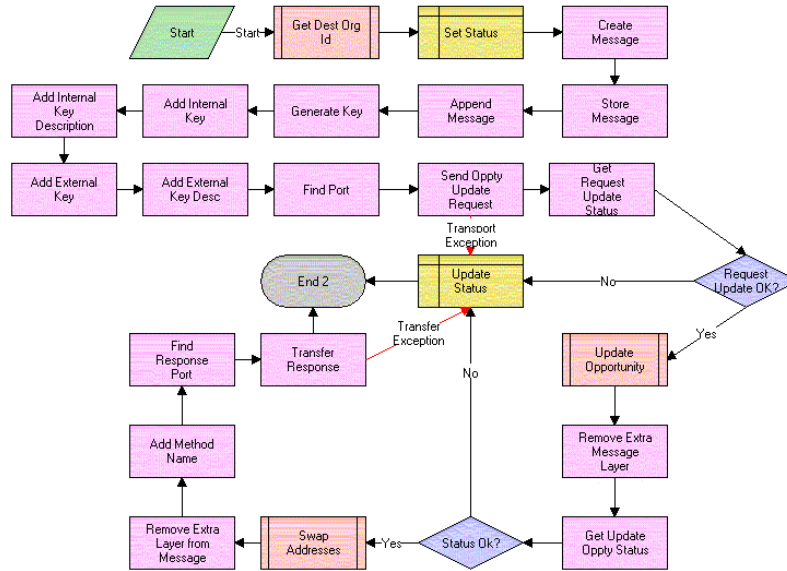
Figure 5.   Opportunity Sharing External Query Process

When this workflow is called, the following events happen:

- **Get Dest Org Id.** Calls Opportunity Sharing Inbound or Outbound. This will return the partner id of the partner we are requesting an update from, the external key, and external key description.

- **Set Status.** Updates the transfer status to Update Pending.

- **Create Message/Store Message/Append Message.** Creates an empty Siebel message.

- **Generate Key.** Creates the internal key.

- **Add Internal Key.** Adds the internal key to the Siebel message.

- **Add Internal Key Description.** Adds the internal key description to the Siebel message.

- **Add External Key.** Adds the external key to the Siebel message.

- **Add External Key Description.** Adds the external key description to the Siebel message.

- **Find Port.** Finds the web service port for the partner.

- **Send Oppty Update Request.** Sends this Siebel message to the other system, and returns the response from the other system.

- **Get Request Update Status.** Gets the transfer status from the response Siebel message.

- **Request Update Ok.** Checks that the transfer status is successful.

- **Update Opportunity.** Calls Opportunity Sharing Siebel Update as a subprocess, passing it the Siebel message. Returns the response Siebel message.

- **Remove Extra Message Layer.** Removes the extra layer that is added when a Siebel message is passed up from a subprocess.

- **Get Update Oppty Status.** Retrieves the status of the update from the Siebel message that Opportunity Sharing Siebel Update inserts before returning the message.

- **Status Ok.** Checks to see if the update status is Update Successful.

- **Swap Addresses.** Swaps the Source Organization and Channel Partner information, the internal key and external key, and the internal key description and the external key description.

- **Remove Extra Layer from Message.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This step removes that layer.

- **Add Method Name.** Inserts the name of this method, Query, into the Siebel message. This will be used in a later workflow.

- **Find Response Port.** Finds web service port for sending an update response for this partner.

■ **Transfer Response.** Transfers the Siebel message with the update status back to the partner.

■ **Update Status.** If any of the transfer statuses from the Siebel message are Update Unsuccessful or any of the transfers returns an exception, updates the transfer status to Update Unsuccessful.

Opportunity Sharing External Update

The Opportunity Sharing External Update workflow process is shown in Figure 6.
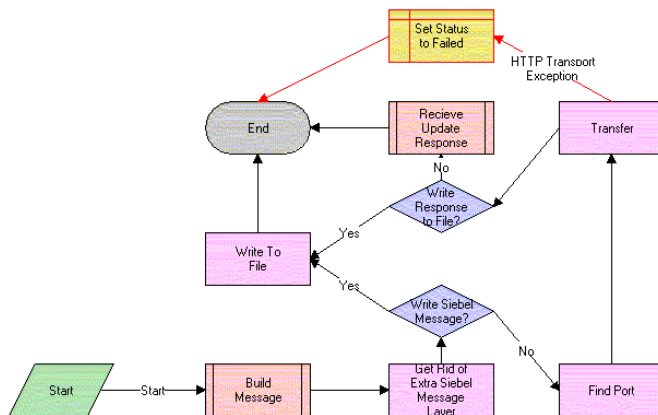
Figure 6.   Opportunity Sharing External Update Process

When this workflow is called, the following events happen:

■ **Build Message.** Calls the subprocess Opportunity Sharing Set Update Status, passing in the opportunity id. Returns the partner id and a Siebel message.

■ **Get Rid of Extra Siebel Message Layer.** Removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.

■ **Write Siebel Message.** Checks to see if the value of the process property "Write Orig File" is Y Or N.

■ **Find Port.** Finds the web service port for the partner.

- ■ **Transfer.** Sends the opportunity to the other system and returns a response Siebel message.

- ■ **Write Response to File.** Checks to see if value of the process property "Write Response" is Y or N.

- ■ **Receive Update Response.** Calls the subprocess Opportunity Sharing Receive Update Response, passing it the response Siebel message.

- ■ **Write to File.** If Write Orig File is Y, writes the pre-transfer Siebel message to an xml file. If Write Response to File is Y, writes the post-transfer Siebel message to an xml file.

- ■ **Set Status to Failed.** If transfer returns an exception, updates the transfer status for this opportunity to Update Unsuccessful.

Opportunity Sharing Inbound or Outbound

The Opportunity Sharing Build Siebel Message workflow process is shown in Figure 7.
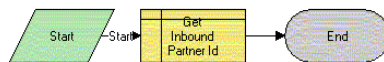
Figure 7.   Opportunity Sharing Inbound or Outbound Process

When this workflow is called, the following event happens:

- ■ **Get Inbound Partner Id.** Queries the ANI Keymap bus comp and retrieves the initial direction, the partner id, the external key, and the external key description of this opportunity.

Opportunity Sharing Pick Partner

The Opportunity Sharing Pick Partner workflow process is shown in Figure 8.
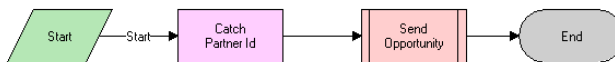
Figure 8.   Opportunity Sharing Pick Partner Process

When this workflow is called, the following events happen:

- **Catch Partner Id.** Retrieves the partner id of the partner we are sending the opportunity to and stores it in a process property.

- **Send Opportunity.** Calls Oppty Sharing External Create, passing it the partner id.

Opportunity Sharing Receive Create Response

The Opportunity Sharing Receive Create Response workflow process is shown in Figure 9.
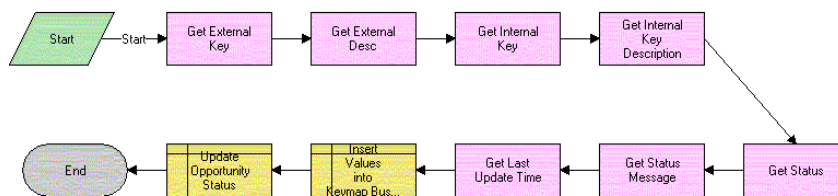
Figure 9.   Opportunity Sharing Receive Create Response Process

When this workflow is called, the following events happen:

- **Get External Key.** Finds the value of the external key in the Siebel message and returns it.

- **Get External Key Desc.** Finds the external key description in the Siebel message and returns it.

- **Get Internal Key.** Finds the value of the internal key in the Siebel message and returns it.

- **Get Internal Key Description.** Finds the value of the internal key description in the Siebel message and returns it.

- **Get Status.** Returns the transfer status from the Siebel message.

- **Get Status Message.** Returns the transfer status message from the Siebel message.

- **Get Last Update Time.** Retrieves the time when the Siebel message was created, which was added to the Siebel message when it was created.

- **Insert Values into Keymap Bus Comp.** Adds the external key, external key description, status, and the timestamp to the keymap record.

Opportunity Sharing Receive Update Response

The Opportunity Sharing Receive Update Response workflow process is shown in Figure 10.
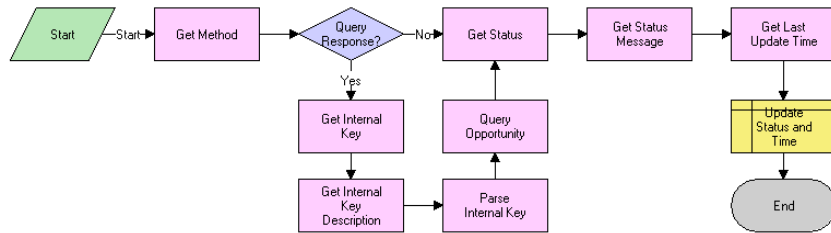
Figure 10.   Opportunity Sharing Receive Update Response Process

When this workflow is called, the following events happen:

■ **Get Method.** Returns the method value from the Siebel message. Both update and query use Opportunity Sharing Receive Update Response, and this method value tells the workflow whether this is a send update or receive update.

■ **Query Response.** Checks to see if this is a response from an update or if this is a response from a query.

■ **Get Internal Key/Get Internal Key Description/Parse Key/Query Opportunity.** If this is a response from a query, this workflow is started from the inbound web services, so there is no active object id. The workflow needs to find the opportunity and retrieve the object id. This group of steps returns the external key and the external key description and create a search specification from them. Query Opportunity will use this search specification to find the opportunity and return its object id. If this is a response from an update, the workflow is activated from the Opportunity Sharing External Update workflow and an object id is passed in as an argument, so these steps are unnecessary and are skipped.

■ **Get Status.** Returns the transfer status from the Siebel message.

■ **Get Status Message.** Returns the transfer status message from the Siebel message.

■ **Get Last Update Time.** Retrieves the time when the Siebel message was created, which was added to the Siebel message when it was created.

■ **Update Status and Time.** Updates the status and the timestamp to the keymap record.

Opportunity Sharing Set Update Status

The Opportunity Sharing Set Update Status workflow process is shown in Figure 11.
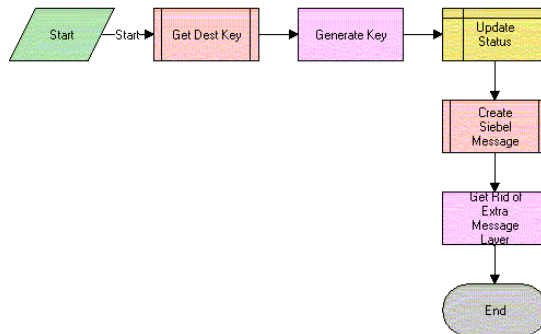
Figure 11.   Opportunity Set Update Status Process

When this workflow is called, the following events happen:

■ **Get Dest Key.** Calls Opportunity Sharing Inbound or Outbound and returns the partner id, external key, external key description.

■ **Generate Key.** Generates an internal key from the process property internal key description. Currently internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this as a subprocess.

■ **Update Status.** Updates the transfer status to Update Pending.

■ **Create Siebel Message.** Calls Opportunity Sharing Build Siebel Message, passing in an object id, partner id, external key, external key description, internal key, and internal key description. It returns a Siebel message.

■ **Get Rid of Extra Message Layer.** Gets rid of the extra layer that is added to a Siebel message when it is passed up from a subprocess.

Opportunity Sharing Siebel Create

The Opportunity Sharing Siebel Create workflow process is shown in Figure 12.

Figure 12.   Opportunity Sharing Siebel Create Process

When this workflow is called, the following events happen:

■ **Get Opportunity.** Retrieves the opportunity property set from the Siebel message.

■ **Query Opportunity.** Using the opportunity property set, searches for the opportunity in this database and returns the number of opportunities that match that the search specification.

■ **Oppty Exists.** Checks to see if the number of opportunities found by the query is greater than zero, to determine whether the opportunity already exists.

■ **Set Opportunity Error Status.** If the opportunity already exists, sets the status process property to an error status and sets the status message process property to the appropriate error message.

■ **Get External DUNS Number.** If the opportunity does not exist, retrieves the Source Organization's DUNS number.

■ **DUNS Num Exists.** Checks to see if the previous step returns an empty DUNS Number.

■ **Set Partner DUNS Error Status.** If the DUNS number is empty, sets the status process property and sets the status message process property to the appropriate error message.

■ **Retrieve Record Id.** If the DUNS Number has a value, uses that value to find the partner id of source organization.

■ **Partner Exists.** Checks to see if the previous step returns an empty partner id.

■ **Set Partner Id Error Status.** If the partner id is empty, sets the status process property and set the status message process property to the appropriate error message.

■ **Add Account.** Calls PRM ANI Inbound Create Account Process, passing it the Siebel message, the name of the account integration object this process uses, and the account object hierarchy path. It returns an account status code and an account status message.

■ **Account OK.** Checks to see if the account status code equals the general error code.

■ **Set Account Error Status.** If the account status code returned a general error, sets the status process property to an error status and set the status message process property to the appropriate error message.

■ **Upsert Opportunity.** Inserts the opportunity property set into the system.

■ **Set Oppty Error Status.** If the opportunity insert returns an exception, sets the status process property to an error status and sets the status message process property to the appropriate error message.

■ **Get External Key.** Finds the value of the external key in the Siebel message and returns it.

■ **Get External Desc.** Finds the external key description in the Siebel message and returns it.

- **Create Internal Key.** Generates an internal key from the process property internal key description. Currently internal key description has a default value. This value can be changed manually or passed in from any workflow that calls this as a subprocess.

- **Swap Addresses.** Swaps the Source Organization and Channel Partner information, the internal key and external key, and the internal key description and the external key description.

- **Remove Extra Message Layer.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This step removes that layer.

- **Insert Values into Keymap Bus Comp.** Creates a new transfer record for this opportunity.

- **Set Status OK.** Sets the status process property to successful.

- **Add Status.** Adds the status to the Siebel message. This is done whether there has been a problem and the status is an error code or whether status is ok.

- **Add Status Message.** Adds the status message to the Siebel message.

Opportunity Sharing Siebel Query
The Opportunity Sharing Siebel Query workflow process is shown in Figure 13.
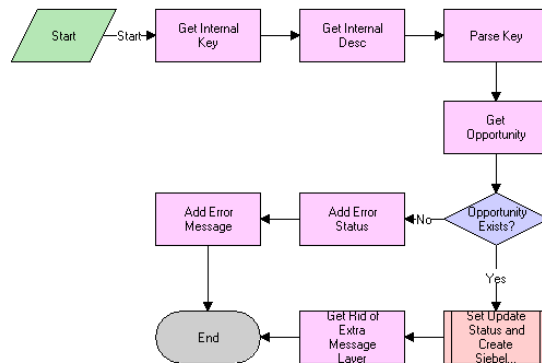
Figure 13.   Opportunity Sharing Siebel Query Process

When this workflow is called, the following events happen:

■ **Get Internal Key.** Finds the value of the internal key in the Siebel message and returns it.

■ **Get Internal Desc.** Finds the internal key description in the Siebel message and returns it.

■ **Parse Key.** Takes in internal key and internal key description and creates a search specification.

■ **Get Opportunity.** Searches for the opportunity using the search specification.

■ **Opportunity Exists.** Checks to see if the number of opportunities found by the query is greater than zero to determine if the opportunity already exists.

■ **Add Error Status.** If the opportunity does not exist, sets the transfer status in the Siebel message to an error status.

■ **Add Error Message.** If the opportunity does not exist, sets the transfer status message in the Siebel message to an error status message.

■ **Set Update Status and Create Siebel Message.** Calls Opportunity Sharing Set Update Status, passing it the opportunity id.

■ **Get Rid of Extra Message Layer.** Removes the extra layer that is added to a Siebel message when it is passed up from a subprocess.

Opportunity Sharing Siebel Update

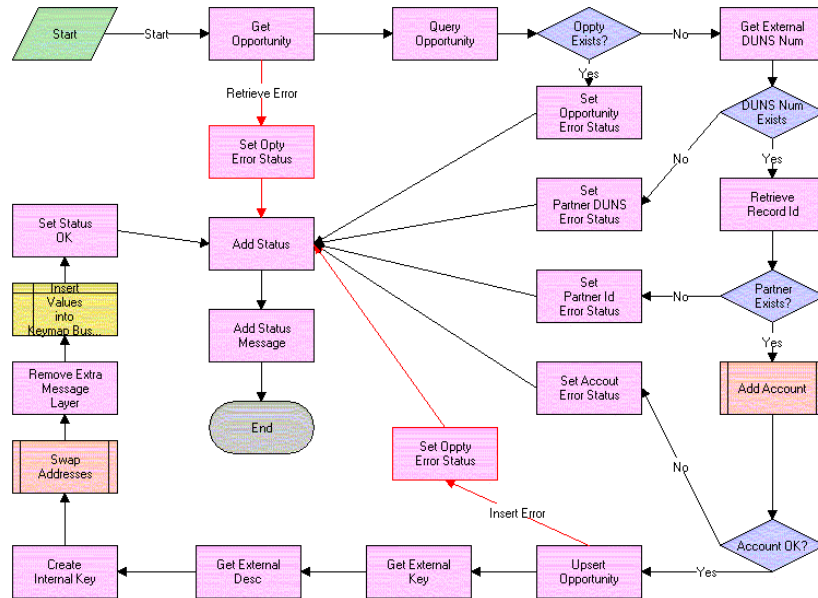The Opportunity Sharing Siebel Update workflow process is shown in Figure 14.
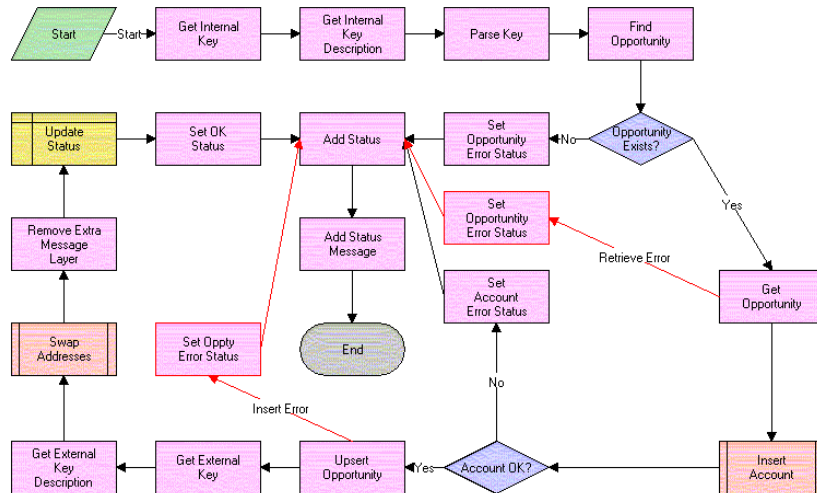
Figure 14.   Opportunity Sharing Siebel Update Process

When this workflow is called, the following events happen:

■ **Get Internal Key.** Finds the value of the internal key in the Siebel message and returns it.

■ **Get Internal Key Description.** Finds the internal key description in the Siebel message and returns it.

■ **Parse Key.** Takes in internal key and internal key description and creates a search specification.

■ **Find Opportunity.** Searches for the opportunity using the search specification.

■ **Opportunity Exists.** Checks to see if the number of opportunities found by the query is greater than zero to determine if the opportunity already exists.

- **Set Opportunity Error Status.** If the opportunity does not exist, sets the status process property to an error status and set the status message process property to the appropriate error message.

- **Get Opportunity.** If the opportunity does exist, retrieves the opportunity property set from the Siebel message.

- **Insert Account.** Calls PRM ANI Inbound Create Account Process, passing it the Siebel message, the name of the account integration object this process uses, and the Account Object Hierarchy Path. It returns an account status code and an account status message.

- **Account OK.** Checks to see if the account status code equals the general error code.

- **Set Account Error Status.** If the account status code returned a general error, sets the status process property to an error status and sets the status message process property to the appropriate error message.

- **Upsert Opportunity.** Updates the opportunity.

- **Get External Key.** Retrieves the external key from the Siebel message.

- **Get External Key Description.** Retrieves the external key description from the Siebel message.

- **Swap Addresses.** Swaps the Source Organization and Channel Partner information, the internal key and external key, and the internal key description and the external key description.

- **Remove Extra Message Layer.** When a Siebel message is passed up from a subprocess it adds an extra layer to the message. This step removes that layer.

- **Set Oppty Error Status.** If the opportunity update returns an exception, sets the status process property to an error status and sets the status message process property to the appropriate error message.

- **Update Status.** Updates the transfer status and the timestamp for this transfer record.

- **Set OK Status.** Sets the status process property to successful.

■ **Add Status.** Adds the status to the Siebel message. This is done whether there has been a problem and the status is an error code or whether the status is ok.

■ **Add Status Message.** Adds the status message to the Siebel message.

PRM ANI Inbound Create Account Process

The PRM ANI Inbound Create Account workflow process is used by both opportunity transfer and shopping cart transfer. It is covered in "PRM ANI Inbound Create Account Process" on page 110.

PRM ANI Inbound Addressing Change Process

The PRM ANI Inbound Addressing Change workflow process is used by both opportunity transfer and shopping cart transfer. It is covered in "PRM ANI Inbound Addressing Change Process" on page 113.

Shopping Cart Transfer Workflows

The workflow processes described in this section are associated with shopping cart transfer.

They are used for the following functions:

■ Outbound transfer

■ Inbound transfer

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

Workflows for Outbound Shopping Cart Transfer

Outbound shopping cart transfer uses the following processes:

■ **Transfer Cart Outbound Initial.** Manages the general process flow, from the selection of the destination organization to the acknowledgment processing.

■ **Transfer Cart Outbound Request.** Controls the creation of the Shopping Cart Data Structure. Most of the work is done in the subprocesses; everything is pieced together here.

■ **Transfer Cart Outbound Create Header Process.** Gathers and sets data needed for the message header and creates the message header.

■ **Transfer Cart Outbound Create and Append Process.** Used in many places as a utility workflow process that creates the child hierarchy and appends the child instance to the parent object.

■ **Transfer Cart Outbound Receive Acknowledgment Process.** Processes the response generated by the external system.

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

Workflows for Inbound Shopping Cart Transfer

Inbound shopping cart transfer uses the following processes:

■ **Transfer Cart Inbound Receive.** Handles the initial processing of the data.

■ **Transfer Cart Inbound Create Cart.** Handles the task of coordinating calls to the other subprocesses. If an error occurs with either the customer contact or an account, it uses user-configurable business logic to determine what happens next.

■ **PRM ANI Inbound Create Account.** Inserts an account record if the data is present and viable. Returns an error if the data is not viable. Skips the insert steps if the data is not present, assuming that the Customer only has Contact information, and no Account.

■ **Transfer Cart Inbound Create Contact.** Creates the Customer Contact information if the data is present and viable. Returns an error if the data is not viable. Assumes the contact is anonymous if the data is not present.

■ **Transfer Cart Inbound Create Quote.** Creates the Quote (persistent shopping cart) after checking the data for integrity.

■ **PRM ANI Inbound Addressing Change.** Swaps the Source Organization and Destination Channel Partner information.

Error handling is used to catch problems and report them to the external (requesting) system. Generally, if an error is found, the process will halt and pass the error messages up to the calling process. The calling process will in turn pass the error back to its calling process. When it reaches the top process, it will return an error saying that the transfer was unsuccessful.

Transfer Cart Outbound Initial Process

The Transfer Cart Outbound Initial Process workflow process is shown in Figure 15.
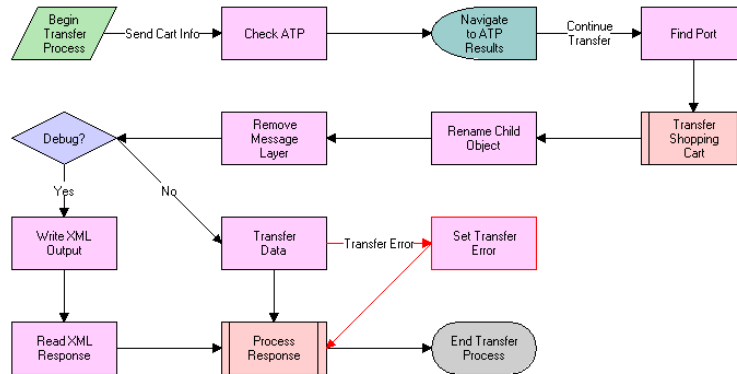
Figure 15. Transfer Cart Outbound Initial Process

When this workflow is called, the following events happen:

■ The first step checks for the availability of the items the customer wants to purchase.

■ The next step finds the communication information associated with the partner and then runs the **Transfer Cart Outbound Request Process** subprocess to create the Shopping Cart data structure.

■ The next step checks to see if we are in debug mode (controlled by the Debug Flag in the Process Properties). If we are, we need to dump the data into a file and read in a suitable response from a file.

■ Most of the time the Debug Flag is set to false, and will allow for use of the Web Services instead. In this case, the RPC call is made and a response is received when web services is complete.

■ The Response is processed by **Transfer Cart Outbound Receive Acknowledgement Process** (either success or failure) as the final step in this process.

Transfer Cart Outbound Request Process

The Transfer Cart Outbound Request Process workflow process is shown in Figure 16.
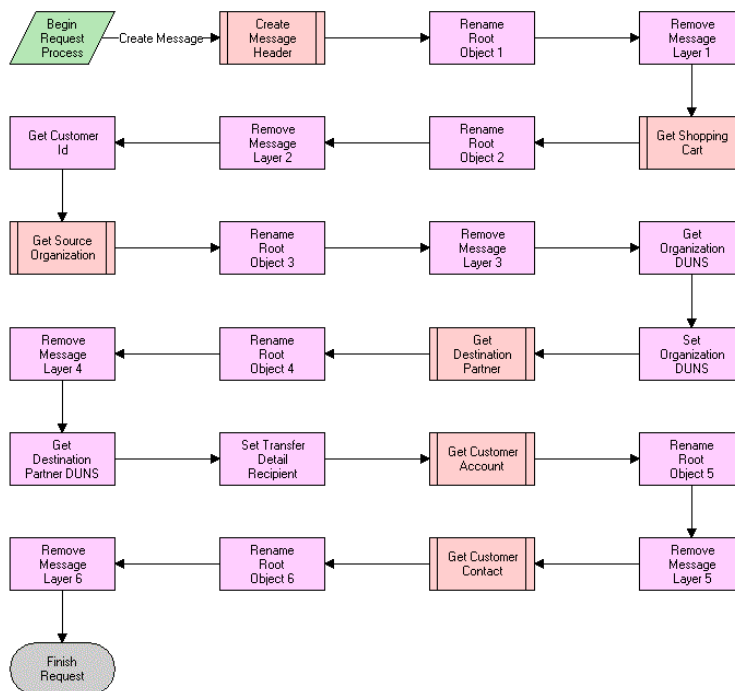
Figure 16.   Transfer Cart Outbound Request Process

When this workflow is called, the following events happen:

■ The first step creates the message header, with information about the message itself including timestamps, and so on.

■ The Next step adds the shopping Cart Data (Quote, Quote Item, and so on) to the Shopping Cart data structure.

■ Next, the process includes information about the Source Organization sending the data.

■ Then it appends information about the destination partner to this message.

■ Finally, it adds the Customer information, including account and customer data.

Transfer Cart Outbound Create Header Process

The Transfer Cart Outbound Create Header Process workflow process is shown in Figure 17.
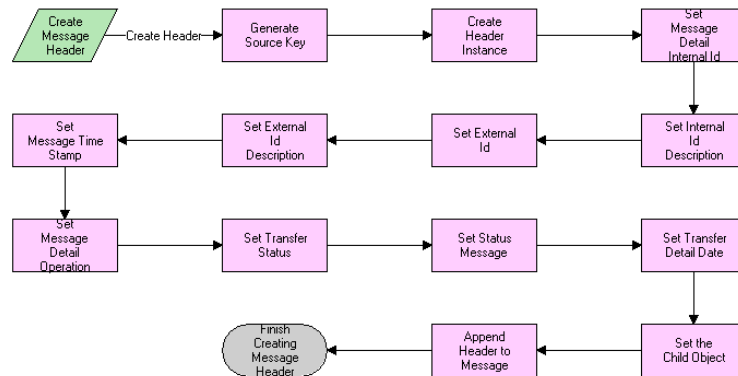
Figure 17. Transfer Cart Outbound Create Header Process

When this workflow is called, the following events happen:

■ The early steps gather and set data used in the message header.

■ They set all of the key information first, including the Internal Key and Key description. This is used by the External system to reference a record in our database.

■ They also set the timestamps and status messages.

■ The later steps instantiate the header instance by creating an empty data structure based on the metadata provided by the integration object definition in Siebel Tools, and they append all the data to the empty data structure.

Transfer Cart Outbound Create and Append Process

The Transfer Cart Outbound Create and Append Process workflow process is shown in Figure 18.
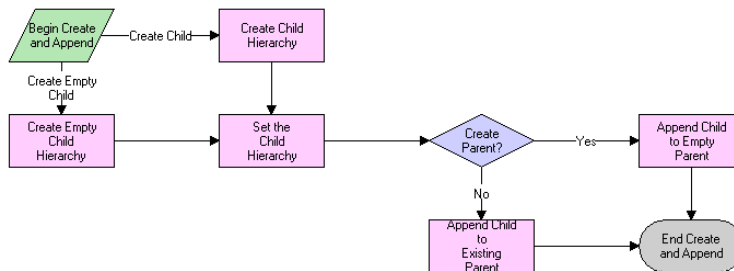
Figure 18.   Transfer Cart Outbound Create and Append Process

When this workflow is called, the following events happen:

■ First, it creates the child hierarchy. If no business component reference is provided (empty Customer Account Data, for instance) it instantiates an empty instance of the child.

■ Then it appends the child instance to the Parent Object. This is the Shopping Cart Object most of the time. If a flag is set, it can create an empty parent, and append this child to it.

Transfer Cart Outbound Receive Acknowledgment Process

The Transfer Cart Outbound Receive Acknowledgment Process workflow process is shown in Figure 19.
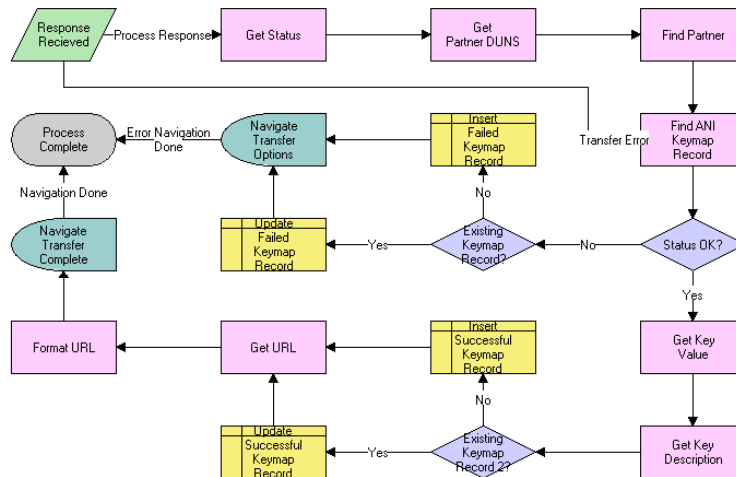
Figure 19.   Transfer Cart Outbound Receive Acknowledgement Process

When this workflow is called, the following events happen:

■ First, it gets the status of the message that has been received and looks for the partner it was received from.

■ Then it looks for an existing Keymap record so that we know whether to update it or create a new record. The Keymap data holds information about transferring of information, including the time of the last transfer and the key we can use to reference the shopping cart's counterpart in the external system.

■ If there is no error, it creates or updates the keymap record and retrieves the URL information. Then it renders the redirection view with the URL it has retrieved, using Virtual Fields.

■ If there is an error, it presents the customer with an option view that allows the customer to decide whether to choose another partner, or cancel the transaction.

Transfer Cart Inbound Receive Process

The Transfer Cart Inbound Receive Process workflow process is shown in Figure 20.
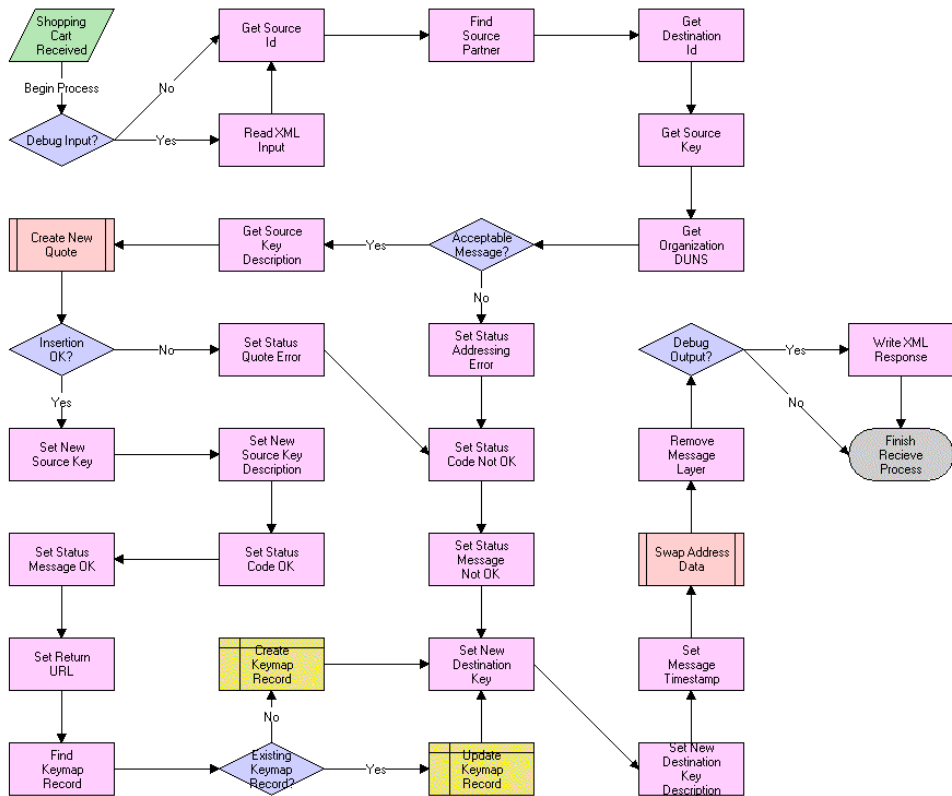
Figure 20.   Transfer Cart Inbound Receive Process

When this workflow is called, the following events happen:

■ First, it makes sure that the sender is someone that is authorized to send requests.

■ It checks that the external system's key is present, and that we are the intended recipients.

- It gets the key description and runs the Transfer Cart Inbound Create Cart Process.

- If an error is generated, it report it to the calling system and finishes the process. No Keymap record is created because the quote may not have been created.

- If no error is generated (OK status), it:

  - updates the keys statuses in the shopping cart message.

  - creates the Keymap record.

  - generates the URL needed to send to the calling system, so it can redirect the user to this system, with this shopping cart.

  - sets the timestamps and sends the message back the caller.

Transfer Cart Inbound Create Cart Process

The Transfer Cart Inbound Create Cart Process workflow process is shown in Figure 21.
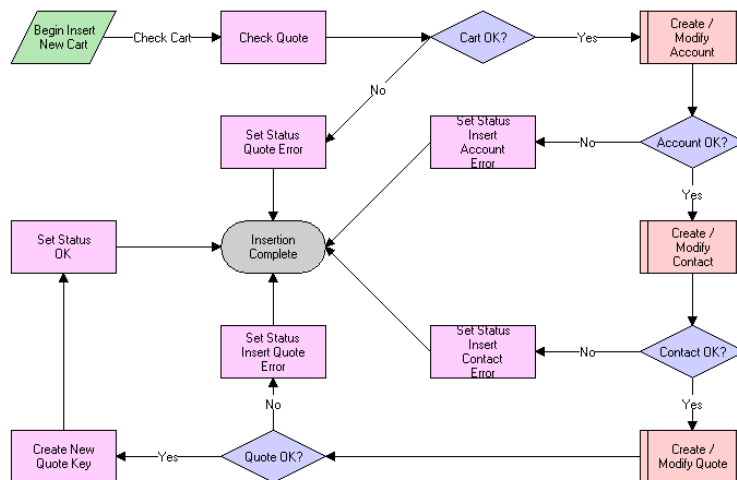
Figure 21. Transfer Cart Inbound Create Cart Process

When this workflow is called, the following events happen:

■ First, it checks of the quote.

■ Then it inserts the customer account information.

■ Then it inserts the customer contact information.

■ Then it inserts the quote information and links it to the customer information.

PRM ANI Inbound Create Account Process

The PRM ANI Inbound Create Account Process is shown in Figure 22.
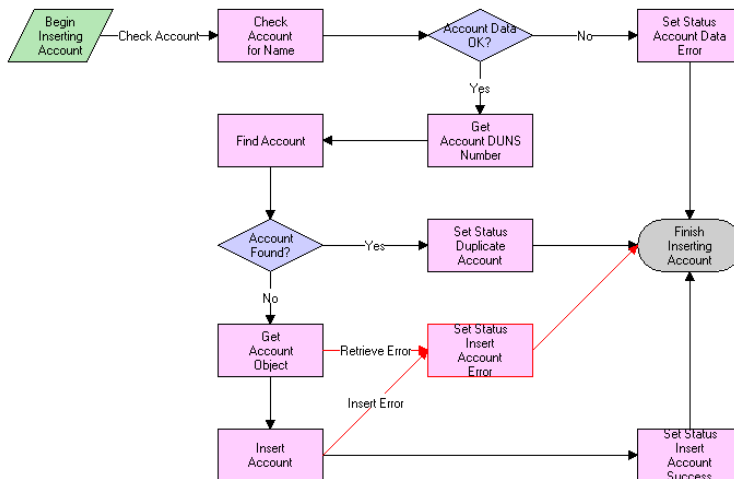
Figure 22.   PRM ANI Inbound Create Account Process

When this workflow is called, the following events happen:

■ It checks to see if the Account Name and DUNS Number are viable.

■ It looks in the database for an account with the same DUNS number. This Number is our method of uniquely identifying an account or partner.

■ If the account is found, it report the record's id.

■ If the account is not found, it creates a new account.

Transfer Cart Inbound Create Contact Process

The Transfer Cart Inbound Create Contact Process workflow process is shown in Figure 23.
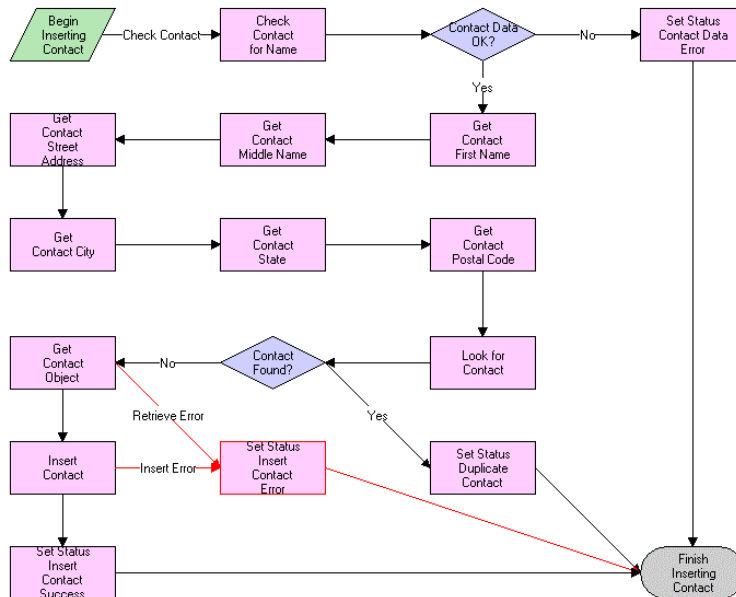
Figure 23.   Transfer Cart Inbound Create Contact Process

When this workflow is called, the following events happen:

■ It checks for the presence and viability of data. If data is not present, it assumes that the Contact is Anonymous. If the data is not viable, it returns an error.

■ It creates a user key for the contact similar to the user key acceptable for most credit card transactions, which is the combination of First Name, Last Name, Street Address, City, State, and Postal Code.

■ It extracts customer information from the data structure, and then uses the key to query for the contact.

   ■ If a duplicate is found, it is reported.

   ■ If a duplicate is not found, it attempts to insert the contact into the contact table.

Transfer Cart Inbound Create Quote Process

The Transfer Cart Inbound Create Quote Process workflow process is shown in
Figure 24.
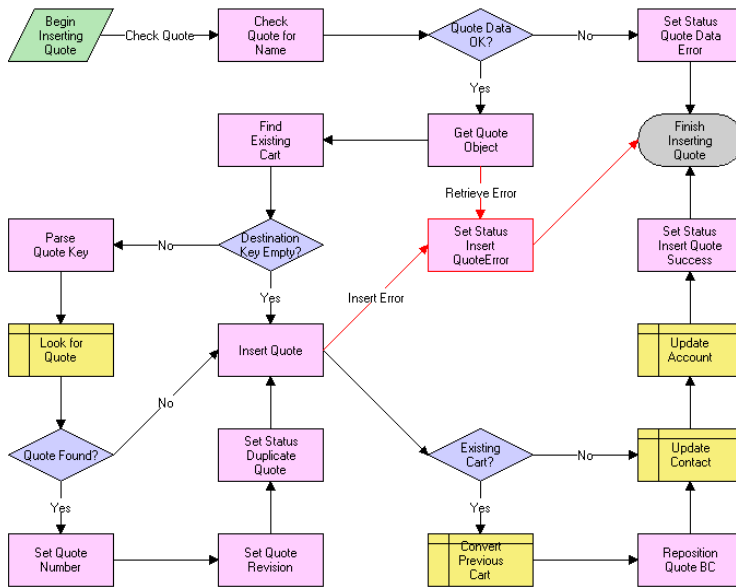
Figure 24.   Transfer Cart Inbound Create Quote Process

When this workflow is called, the following events happen:

■ The unique identifier for the quote is the Destination Key. The Key is provided
by the source system to reference objects on the external system. If this is the
first request for a transfer of this cart, this value of the key should be empty.
Then this workflow creates the cart and generate a new Key for the quote record.

■ If this cart has been transferred before, then the key contains data, which is used
to locate the existing cart on the destination system. The workflow updates this
cart data.

■ Finally, the Quote is attached to the correct contact and account Records (the
customer data).

PRM ANI Inbound Addressing Change Process

The PRM ANI Inbound Addressing Change Process is shown in Figure 25.
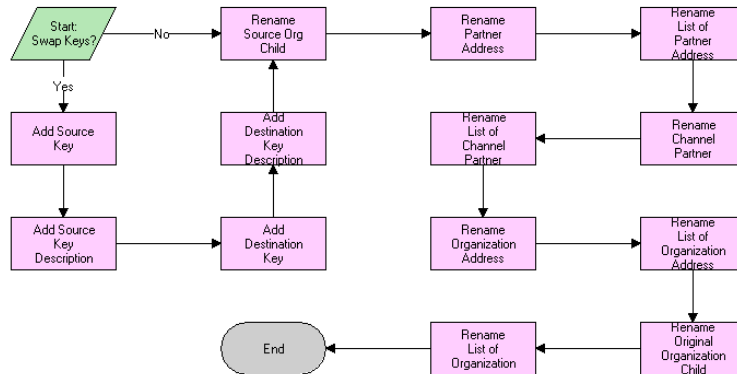
Figure 25.   PRM ANI Inbound Addressing Change Process

When this workflow is called, the following events happen:

■ The first steps take the information about the system keys, internal and external, and uses it to judge whether we need to swap the Source Organization and Destination Channel Partner information in our message.

■ If the key manipulation is handled elsewhere, the remaining steps are ignored.

■ If the key manipulation is not handled elsewhere, the next steps swap the Source Organization and Destination Channel Partner data.

■ Since the fields (including the addresses) are the same, we simply alter the names of the components (Channel Partner Address becomes Organization Address, and so on. No data is actually moved.

■ The hierarchy component names are kept in process properties to allow for greater flexibility. If an integration component is renamed, a small change in the process properties is all that is needed.

Business Services Used by ASIs

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

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

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

Conventions for Hierarchy Paths

We have used the following convention for Hierarchy paths in a number of our Service Methods:

Hierarchy Paths are inputs of the form *IC1.IC2.IC3…*, where IC1, IC2, IC3, and so on, are Integration Component Names that tell the method how to traverse the Object definition to find the right place to put the child.

For example, if we are placing a business address under the Account under the Opportunity Object, the path would read simply Opportunity.Account.

For the Set Child Type Method, a slightly different methodology in the Hierarchy Path is used:

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

The first three substrings will appear as follows:
ChildObject.ListOfMessageType.RootComponentName. An example is:
```
SiebelMessage.ListOfANI Shopping Cart Message (PRM ANI).Message
Details
```

The following substrings will alternate between *ListOf* Component Names and the Component Names themselves. An example is: `ListOfChannel Partner.Channel Partner.ListOfChannel Partner Business Address.Channel Partner Business Address`

Append Hierarchy

This method is used to append a Child Integration Object to a Parent Integration Object. The Parent object must contain the full definition of the Child object.

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

- Inputs:

    - **Hierarchy Path - String.** Used to denote where to append the Child to the Parent.

    - **SiebelMessage - Hierarchy.** Used to store the Integration Object data of the Parent Hierarchy.

- Outputs:

    - **SiebelMessage - Hierarchy.** The resulting Object Instance with the Child attached to the parent in the correct place on the data structure.

- Example:

    Transfer Cart Outbound Create Header Process, Append Header to Message

Create Empty Hierarchy

This method is used to Create an empty Integration Object instance with the same structure as a normal integration object but with two notes.

All data fields are present and empty (initialized to empty string).

Each component in the definition of the Integration Object is instantiated Once and only Once in exactly the structure that is prescribed by the definition.

- Inputs:

- ■ **Hierarchy Name - String.** Provides the name of the Integration Object to Instantiate.

- ■ **Message Id - String.** (Optional) Provides the Message Id that is used to identify this specific Integration Object Instance. If this is not provided, we will calculate a new one.

■ Outputs:

- ■ **SiebelMessage - Hierarchy.** Returns the Integration Object Instance with the empty Component fields.

■ Example:

Transfer Cart Outbound Create Header Process, Create Header Instance

Generate Key

This method is used to return a string that can be used to uniquely identify a record in the Service's business component. In the case of Workflow Processes, this refers to the primary business component of the processes' business object.

■ Inputs:

- ■ **Key Description - String.** Used to describe the form of the string to be generated.

    This input is in the form *[A].[B].[C]…* where A, B, C… are names of fields that should correspond to a unique key in your database.

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

■ Outputs:

- ■ **Source Key - String.** Used to identify the record in the service's business component.

■ Example:

Transfer Cart Inbound Create Cart Process, Create New quote Key

Get Child Type

This method is used to report the Child Type of a Property Set. For integration objects, this is generally of type SiebelMessage.

- Inputs:

    - **SiebelMessage - Hierarchy.** Hierarchy children that we want to examine.

- Outputs:

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

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

- Example:

    No example

Get Hierarchy Value

This method is used to return a string field value in the Integration Object Structure.

- Inputs:

    - **Hierarchy Path - String.** Path to the IC parent of the field. Note that this path does not include the field name in it.

    - **Property Name - String.** The name of the field we want to read.

    - **Siebel Message - Hierarchy.** The Integration Object we are looking into.

    - **ReturnBlankIfNull - String.** (Optional) Allows the returned value to be blank, rather than returning an error if the field is not found in the hierarchy.

- Outputs:

    - **Property Value - String.** The value of the field we are examining.

- Example:

    Transfer Cart Inbound Create Contact Process, Get Contact Street Address

Get System Preference

This method is used to look up values in the System Preferences.

- Inputs:

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

- Outputs:

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

- Example:

  Transfer Cart Outbound Request Process, Get Organization DUNS

Isolate Integration Id

This method is used to strip an Integration Object instance of everything except for the Integration Id. Even child components will be stripped away.

This method is not called by PRM ASIs, but is referenced by other ASIs. It is used because we want Siebel Adapter Operations to consider only the Integration Id to look for a record in some cases.

- Inputs:

  - **Siebel Message - Hierarchy.** This contains the Object that we want to strip through.

- Outputs:

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

- Example:

  No Example

Load Child Hierarchy

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

■ Inputs:

- **Siebel Message - Hierarchy.** The message one wants to load, to be operated upon later.

■ Outputs:

- None

■ Example:

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

Parse Key

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

■ Inputs:

- **Key Description - String.** Description of the Key, follows the format described in Generate Key.

- **Source Key - String.** In conjunction with the description, defines the record we want to look at.

■ Outputs:

- **Search Spec - String.** The search specification that we can use to execute the primary business component with. Only one record should be in this record set, since it is unique.

■ Example:

Transfer Cart Inbound Create Quote Process, Parse Quote Key

Query Business Component

Provides a means to query any business component in the business object. This provides a bit more flexibility than the Standard Siebel Operation Query, since you can search the entire business component without regard to the links to the primary business component.

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

- Inputs:

  - **Business Component - String.** The name of the business component in the business object to Query through.

  - **Keep Context - String.** (Optional, defaults to Yes) String defining whether we query with regard to the current state of the business object or if we instantiate a new business object to query with (outside of context).

  - **Output Field - String.** (Optional) The values we want to have returned from the record. A number can be appended to the Name so that more than one Field can be retrieved.

    For instance, if we wanted a Name and Location, we would have arguments *Output Field 1* and *Output Field 2* with *Name* and *Location* as their values. If there is more than one record with the search specification, we obtain values from the first record in the executed business component.

  - **Query Field - String.** (Optional) The input values here determine the search specification that is used on the business component.

    To use this argument correctly, one must append the name of the field to the Argument name. The value of the field can be any Workflow Process evaluated string. For instance, if you are looking for a record where [Account Id] = Process Property [Siebel Operation Object Id], you would have:

    - Argument Name: Query Field Account Id

    - Type: Process Property

    - Process Property: Siebel Operation Object Id

  - **Search Spec - String.** (Optional) If the search specification is more easily formulated as a string, then one can choose to provide it here. It can have the same format as any other search specification in Siebel Tools, with the added bonus that you can also choose to have a Workflow Process evaluated string as a possible input.

- Outputs:

- ■ **Record Count - String.** Returns a string representation of the number of records found in the query, up to 100. If there are more than 100 records, returns the value -1, indicating that there are too many records in the query.

- ■ **Output Fields - String.** Fields that we asked to return in the query are returned with the property name equal to the field name.

  In our example above, we would find two output arguments, named *Name* and *Location*. Their values would be those of the first record returned by the query.

■ Example:

PRM ANI Inbound Create Account Process, Find Account

Detach Hierarchy

This method is a complementary function to Append Hierarchy. It basically takes the Specified Integration Object and extracts it from the Parent Object.

- ■ Inputs:

  - ■ **Child Hierarchy Name - String.** The name of the Child hierarchy to instantiate from the Parent Data.

  - ■ **Hierarchy Path - String.** Specifies the path to trace to find the Child Root Integration Component.

  - ■ **Siebel Message - Hierarchy.** Specifies the Parent to extract the Child Object from.

- ■ Outputs:

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

- ■ Example:

PRM ANI Inbound Create Account Process, Get Account Object

Set Child Type

This method is a complementary Function to Get Child Type. It sets the Hierarchy type, in case we need to change something to the type Siebel Message.

- ■ Inputs:

- ■ **Siebel Message - Hierarchy.** The object whose children we are trying to set the type of.

- ■ **Child Type - String.** (Optional) Basically lists the current Child types and what you want to change their values to. For instance, if a user wanted to change a child of type *Account* to be a child of type *Partner*, the user would need to specify the following:

    ❑ Argument Name: Child Type: Account

    ❑ Argument Value: Partner

- ■ **Hierarchy Path - String.** (Optional). Used to tell the method where to do its work. For more information about the structure of this string, see "Conventions for Hierarchy Paths" on page 114.

■ Outputs:

- ■ **Siebel Message - Hierarchy.** The existing object with the child type changed.

■ Example:

Transfer Cart Outbound Request Process, Rename Root Object 1

Set Hierarchy Value

This method is a complementary Function to Get Hierarchy Value. It is used to set the value of a property in an object.

- Inputs:

  - **Hierarchy Path - String.** Specifies the Integration Component path to the field.

  - **Property Name - String.** The name of the Property you want to set.

  - **Property Value - String.** The Value you want to set the Property equal to.

  - **Siebel Message - Hierarchy.** The object that you want to have this new field.

    If there is a problem with the path (a component in the path cannot be found), an error will be returned.

- Outputs:

  - **Siebel Message - Hierarchy.** The object with the Hierarchy value set correctly.

- Example:

  Transfer Cart Outbound Create Header Process, Set Message Time Stamp

Working With New Partners 4

This chapter describes the process of enrolling and setting up new partner companies. It also describes delegated administration, set up tasks that partner administrators can do.

About Partner Registration and Enrollment

Siebel PRM helps you to recruit new partners by allowing public users to view the Siebel Partner Portal Web site and to register as either individuals or companies. If a prospective partner registers as a company, Siebel PRM helps you decide whether to form a partnership with that company.

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

■ **Public Users (also called Anonymous Users).** Any user can view the Siebel Partner Portal home page without registering or providing any information. Public users can read company news and find out about the partner programs that are available. They can also view product offers that are available to the general public (not just to partners), and view literature in the Info Center. The public user home page also includes a log-in area for registered partners and a link to the registration page for visitors who want to register as partners.

■ **Individual Partners (also called Self-Registered Users).** Users who register as individual partners may be consultants who want to get detailed information about your products to recommend them to clients. After providing information about themselves, users are automatically enrolled as individual partners. They can then use the Siebel Partner Portal to purchase products for themselves, participate in auctions, browse and sign up for training courses, view literature, view special offers, and view partner alerts. They cannot share opportunities, service requests, activities, or any other transactional or service data through the Siebel Partner Portal.

■ **Company Partners (also called Registered Users).** Companies who want to work in an active partnership with your company register in your company's partner program. They use the Siebel Partner Portal to provide detailed information about their companies. Your partner manager evaluates this information, decides how your company can work with their company, and decides whether to approve them as partners. Before they are approved as partners, they can view the same information as individual partners. After they are approved as partners, they can view and share opportunities, service requests, and other transactional data with your company.

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

The Siebel Partner Portal Homepage

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

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

Personalization rules are used to control whether applets are hidden or displayed. Personalization is based either on global variables or on profile attributes, depending on whether the user is anonymous, self-registered or registered.

For example, personalization uses a global variable to determine whether the user is anonymous.

Other personalization rules use profile attributes to determine whether the user has a position or not. For example, the Partner Alerts Center applet on the home page will only appear if the user is not anonymous, that is, if the user has registered as an individual or company. The Program Information appears if the user is anonymous.

Other personalization rules, used in the salutation applet, can be based on many other profile attributes, such as the user's organization or geography.

For more information about personalization, see *Personalization Administration Guide*.

Providing Information for Public Users

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

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

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

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

You can set up catalogs for public users in the same way you would for partners. Catalogs that are visible to public users will also be visible to self-registered users. Only Partner Catalogs appear on the Siebel Partner Portal; these are catalogs with the value *Partner* in the Type field.

For more information about responsibilities, see *Security Guide for Siebel eBusiness Applications*.

For more information about setting up catalogs, see the section "Assigning Master Data to the Partner Company" on page 144.

For more information about customizing Siebel PRM, see *Siebel Tools Reference* and *Personalization Administration Guide*.

Registering Individual Partners

When public users register as individual partners, they click the New User link on the home page, which lets them register using the following forms:

- **Personal Information.** The users enter their name, email, time zone, a user name and password, and a challenge question in case they forget their password.

- **Contact Information.** The users enter additional contact info such as Job Title, Address, and phone number.

- **Select Register Company or Register Self.** The users click one of two buttons to select which type of registration they want.

- **Company Information.** The users enter information about the partner company:

  - For individual registration, only the company name and address are required.

  - For company registration, many more fields are required, to give you detailed information about the partner company, its business, and its interest in partnering with your company, to let you decide whether it should be in your partner program.

- **Terms and Agreements.** The users click I Agree to accept the terms and agreements that are displayed.

- **Thank You Message.** The users click Finish to log in to the Individual User home page.

After they fill out the registration forms, they are automatically registered as individual partners, who can view product literature and self-service screens and can purchase products through the Siebel Partner Portal.

Individual partners cannot share opportunities, service requests, activities, or any other transactional data through the Siebel Partner Portal. However, people who have registered as an individual partner can later apply to have their companies certified as partner companies, and employees of the companies would be able to share this data. They apply by displaying the Profile screen and changing the application type to Company.

To configure Siebel PRM for individual partners, you should go through the following process:

■ Configure the individual partner home page (optional).

■ Provide visibility to literature, product offers, and other data to individual partners.

■ Customize the email that is sent to thank people for registering as individual partners.

Configuring the Individual Partner Homepage

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

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

Controlling Individual Partners' Access to Data

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

■ **Access Group.** You give your partners visibility to master data by associating this data with access groups.

■ **Responsibility.** In Siebel applications, the screens and views that users can see are determined by their responsibility. Siebel PRM has one responsibility for individual partners, which is called Self-registered Partner Agent. Individual partners can see screens and views assigned to this responsibility.

■ **Personalization.** In Siebel applications, the applets that users see and the data they see in a given applet can be controlled using personalization, which determines what is visible to users based on global variables (such as the global variable that determines whether the user is anonymous) and based on many profile attributes, such as the user's organization, age, or geography.

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

■ Assign other master data to individual partners.

■ Optionally, control the screens and applets visible to individual partners.

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

Assigning Master Data to Individual Partners

Siebel applications work with two types of data:

■ **Master (or Referential) Data.** Data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

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

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

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

To use access control to make other master data visible to individual partners, add the individual partners to user lists, add these user lists to access groups, and associate the access groups with the appropriate categories. These can be categories that are also associated with partner companies, or they can be categories you create specifically for individual partners.

For more information about assigning data to organizations and categories, see *Security Guide for Siebel eBusiness Applications*.

For more information on creating and assigning product offers, see *Siebel Marketing Guide*.

For more information on creating and assigning literature and other master data, see *Applications Administration Guide*.

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

To associate literature with a category

1 Navigate to the Catalog Administration screen.

2 In the Catalogs list, click the appropriate catalog.

A Categories list appears that shows the categories in that catalog.

3 Select the appropriate Category.

4 Click the Literature view tab.

The Literature view appears.

5 In the Literature list, click the menu button, then click New Record.

The Add Literature dialog box appears.

6 If necessary, use a query to find the literature you are looking for.

7 Select literature that you want to associate with the category, and click OK.

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

Controlling the Screens Visible to Individual Partners

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

■ Home

■ User Profile

■ Infocenter

■ Offers

■ Partner Locator

■ Partner Alerts

■ Search

■ Self-Service

■ eAuctions Lister Area

■ eSales Catalog, Shopping Cart, Orders, and Saved Quotes

■ eTraining

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

If you want to add a new responsibility or add new views to an existing responsibility, talk to your system administrator.

For more information about responsibilities, see *Security Guide for Siebel eBusiness Applications*.

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

Thanking Individual Partners for Registering

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

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

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

The name of the workflow is Prospect Registration eChannel.

Enrolling New Partner Companies

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

To do this, you must follow a series of steps that will set up this partner company in your system. Typically, this process begins when the partner uses Siebel PRM's online registration in order to apply to be a part of your partner program. There are other ways that a partnership can be initiated, which are discussed in the section "Other Ways of Adding Partner Records" on page 154.

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

■ The organization structure must be established so that you can place this new partner organization into the existing organization hierarchy.

■ Partner Responsibilities must exist in order to assign these responsibilities to the partner organization.

■ Access Groups must also have been created so that the new partner can be placed in the appropriate access groups and be provided access to master data.

These steps are described in Chapter 2, "Setting Up Siebel PRM."

Enrollment Process

To enroll a new partner company, you typically use the following process:

■ **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.

■ **Register the partner company in the Siebel system.** Use the Register button to turn the partner company into an organization in the Siebel system, to place that organization in the hierarchy, and to assign a partner manager.

■ **Assign responsibilities to the partner company.** Responsibilities control which views partners can see.

■ **Assign positions to the partner company.** You can define the positions for the partner company, or you can let a delegated administrator at the partner company define these positions.

■ **Assign master data to the partner company.** You assign most master data by adding the partner company to one or more access groups. You also assign a price list to the partner company.

■ **Add user assignments at the partner company.** You can enter the users at the partner company yourself, or you can enter one user at the partner company as a delegated administrator, who can add other users and delegated administrators at the partner company. As part of adding user assignments, you can also create a User ID and password for each employee and associate the user with a position and responsibilities.

■ **Assign roles to the partner company.** Roles enhance usability by limiting the screen tabs displayed and providing hyperlinked task lists to employees.

■ **Contact the new delegated administrator.** You can set up a workflow to send email to the new delegated administrator after the partner company has been added.

■ **Add locations for the partner locator.** If you want the partner company to be visible in the Partner Locator, you must add locations or have the partner add its own locations, and you must publish locations.

■ **Complete the partner profile.** Optionally, you can complete the partner profile to make sure that it has the information you need and that it is accessible to the right people in your company.

NOTE: In some cases, you can add a partner company and skip the registration and the following steps. Do this only if the partner company is not using the Siebel Partner Portal. You can still work with the partner company record using the Siebel Partner Manager: the channel manager can view the company's records in the Partner screen and can also use the Siebel Partner Manager to request MDF funding for the company. You display partners who are approved but not registered by navigating to the Partner Administration screen and choosing Approved Partners in the Show drop-down list. You display registered partners by navigating to the Partner Administration screen and choosing Registered Partners in the Show drop-down list.

Displaying and Assessing Prospective Partner Companies

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

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

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

You use the Prospective Partners list to view the companies that have applied to become your partners and their profiles. This list includes companies and individuals that have registered as partners on-line.

To view prospective partners and their profiles

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Prospective Partners, if it is not already selected.

The Prospective Partners list appears, with a list of companies that have applied to be partners.

3 Select a partner company in the Prospective Partners list.

Profile information about that company is displayed in the More Info form.

Adding a Partner Record by Approving a Partner Company

If a partner company registered at your Web site to apply to be a partner, you must approve it as the first step of entering it in your Siebel application. Approving the company moves it from the Prospective Partners list to the Partners list.

To approve a partner company

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Prospective Partners, if it is not already selected.

The Prospective Partners list appears.

3 In the record of the prospective partner that you want to approve, click the Approve icon (which is in the Approve column).

The Prospective Partner record is converted to a Partner record, and the Approved Partners list appears.

NOTE: In some cases, you can just approve a partner company and skip the steps that follow this one. Do this only if the partner company is not using the Siebel Partner Portal, and you are using Siebel PRM only to keep track of the partner company, not to share information with it. You can still work with the partner company record using the Siebel Partner Manager: the channel manager can view the company's records in the Partner screen and can also use the Siebel Partner Manager to request MDF funding for the company.

Registering the Partner Company

Whether you add the partner record using the method described earlier or the other methods described at the end of this chapter, you must register the partner company before you can work with the new partner company.

To register the partner company:

■ In the Approved Partners view, select the partner company.

■ In the Partners list, click Register.

■ Make the partner company an organization and place it in your organization hierarchy.

■ Specify your partner manager for the partner company.

About Placing the Partner Company in the Organization Hierarchy

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

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

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

You can also create a hierarchical structure with multiple organizations for the partner company itself. For example, if you assign opportunities to different regional divisions of a partner company, you can create an organization that represents the entire partner company and organizations under it in the hierarchy that represent its regional divisions. Then you can assign opportunities to organizations representing the regional divisions, and only the division you assigned the opportunity to will be able to see it.

For more information about setting up the organization hierarchy in Siebel PRM, see Chapter 2, "Setting Up Siebel PRM."

For more information about using organizations to control visibility to data, see *Security Guide for Siebel eBusiness Applications*.

About Specifying Your Partner Manager Field for the Partner Company

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

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

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

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

Registering the Partner Company

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

NOTE: After you register the partner company, the partner organization cannot be deleted. Be sure you want to create a new organization before clicking Register.

To register the partner company

1 Add a Partner record for the new partner company, using the method described in the section "Adding a Partner Record by Approving a Partner Company" on page 138 or one of the methods described in the section "Other Ways of Adding Partner Records" on page 154.

2 In the Approved Partners view, with the new Partner record selected, click Register at the top of the Partners list.

The Register Partner form appears.

3 Check the Organization box.

Registering this partner company will make it an organization, so you can put it in your organization hierarchy.

4 Click the select button for the Parent Division field.

The Organization dialog box appears.

5 Choose the division that will be above this partner organization in the organization hierarchy, and click OK. If you leave the field blank, the current user's organization will be the parent organization by default.

6 To specify the Partner Manager field:

   a Click the select button for the Partner Manager field.

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

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

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

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

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

The partner company has been registered.

Assigning Responsibilities to the Partner Company

Responsibilities specify which views users of Siebel applications can access.

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

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

Partners cannot create their own responsibilities. They can only choose from the set of responsibilities that you give them access to. You must associate at least one responsibility with the partner organization, so the partner users have access to some views when they log in to the partner portal. Typically, you assign multiple responsibilities to the partner organization so that the delegated administrator can give different types of users different responsibilities, just as you would with your own employees.

For more information about positions and responsibilities, see the section on defining positions and on defining responsibilities in *Applications Administration Guide.*

NOTE: Before you can assign responsibilities to a partner company, your partner operations administrator must have created the appropriate responsibilities while setting up Siebel PRM, as described in Chapter 2, "Setting Up Siebel PRM."

To assign responsibilities to a partner company

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company to which you are assigning the responsibilities.

4 Click the Responsibilities view tab.

The Responsibilities view appears.

5 In the Responsibilities list, click the menu button, then click New Record.

The Add Responsibilities dialog box appears.

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

The responsibility is added to the Responsibilities list.

Assigning Positions to the Partner Company

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

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

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

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

If you are not using delegated administration, you will have to add positions for all partner employees.

For more information about positions and responsibilities, see *Security Guide for Siebel eBusiness Applications*.

To assign positions to a partner company

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company to which you are assigning the positions.

4 Click the Positions view tab.

The Positions view appears.

5 In the Positions list, click the menu button, then click New Record.

6 Enter information in the Position form to create a new position.

Assigning Master Data to the Partner Company

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

■ **Transactional Data.** Data that users can create, read, edit and delete, such as opportunities, accounts, contacts, and service requests. It can be assigned to individuals or groups of individuals (such as a sales team) or to organizations.

■ **Master (or Referential) Data.** Data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

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

To assign most master data to partners, you use access groups. Before you can do this, your channel operations manager must set up the appropriate access groups and categories of master data, as described in Chapter 2, "Setting Up Siebel PRM." Then, any partner company that you add to the access group will have access to the master data visible to that access group.

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

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

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

For information about assigning transactional data to partner companies, see Chapter 6, "Sharing Data With Partners."

To add a channel partner company to an access group

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company which you are adding to the access group.

4 Click the Access Groups view tab.

5 In the Access Groups list, click the menu button, then click New Record.

   The Add Access Groups dialog box appears.

6 Select the Access Groups you want to add the partner to.

7 Click Add.

To assign a price list to a partner company

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company to which you are assigning the price list.

4 Click the Price Lists view tab.

The Price Lists view appears.

5 In the Price Lists list, click the menu button, then click New Record.

The Add Price List dialog box appears.

6 Click the select button for the Price List record that you want to add.

The price list is added to the Price Lists list.

Adding User Assignments at the Partner Company

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

Siebel PRM lets you add two types of partner employees:

■ **End Users.** You can add the employees in your partner company as end users.

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

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

After the delegated administrator has added partner employees, you can view them using the Siebel Partner Manager.

For more information on adding users and delegated administrators, see Chapter 2, "Setting Up Siebel PRM."

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

To display partner employees who are Siebel PRM users

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company whose employees you want to view.

4 Click the User Assignments view tab.

The User Assignments view appears. The following information will be entered for the person who applied to be a partner and for any other partner employees who have been added:

Field	Comments
Name fields	The first and last name and title (such as Mr. or Ms.).
Job Title	The user's job title.
Positions	The user's position or positions.
Responsibilities	The user's responsibility.
User ID and Password	The login name and password that the user uses to log into the Siebel Partner Portal. Password is only accessible if LDAP has been set up.
Time Zone	The user's time zone.
Role	Select the user's role. For more information about roles, see "Administering Roles" on page 46.

Assigning Roles to the Partner Company

Roles increase the usability of Siebel PRM for both brand owner and partner employees. When you create roles and assign users to these roles:

■ Users only see the screen tabs and view tabs for their roles. Roles do not restrict the screens and views that users can display, as responsibilities do. They merely reduce the number of screen tabs and view tabs, so only the ones that the user commonly needs are displayed.

■ Users have a task list for their role on their home page, with hyperlinks that take them directly to the views they use most frequently.

For more information about roles, see the section about administering roles in Chapter 2, "Setting Up Siebel PRM."

If you are using a delegated administrator at the partner company to add partner users, you should assign roles to the partner company. This makes the roles available to the delegated administrator at that company, who associates them with employees.

You assign roles to the partner company by adding them to the User Roles list of the Partner Administration screen.

For detailed information about assigning roles to a partner company, see "Making Roles Available to Partner Delegated Administrators" on page 47.

Contacting the New Delegated Administrator

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

You should tell the delegated administrator to use the Siebel Partner Portal to add new users, including new delegated administrators, and to add user assignments for the employees at the company who will be using the Siebel Partner Portal.

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

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

The name of the workflow is Send Prospect Partner Application Status eMail (Siebel PRM).

For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Adding Locations for the Partner Locator

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

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

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

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

Partners can add locations under their Company Profile, available through the Profile hyperlink on the Partner Portal.

You must also select the Publish check box for a partner to publish all of that partner's locations to the Partner Locator. You can deselect this check box to remove all the partner's locations from the Partner Locator. For example, you may want to do this if you charge partners a fee to be listed in the Partner Locator and one partner company does not pay.

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

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

To publish a partner to the Partner Locator and add locations

1 Navigate to the Partners screen.

2 In the Partners list, select the partner that you want to publish to the Partner Locator.

3 In the More Info form, select the Publish check box.

4 Click the Locations view tab.

5 If the address of this location has not been entered, click the Select button of the address field in the Partners form above the Locations list, and use the dialog box to add the address.

6 In the Locations list, add a record for each of the partner's locations and enter the following information.

Field	Comments
Location Name	Enter a business name for this location.
Address	Click the Select button and select the address of this location.
City	Entered when you select the address.
Zip Code	Entered when you select the address.
State	Entered when you select the address.
Country	Entered when you select the address.

Field	Comments
Longitude	Calculated and entered by the system when the record is saved.
Latitude	Calculated and entered by the system when the record is saved.
Business Hours	Enter the business hours for this location.

Completing the Partner Profile

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

You can:

■ Enter the partner's competitors and existing partnerships.

■ Enter the partnership profile.

■ Give your employees access to the partner in My Partners view.

Entering the Partner's Competitors and Existing Partnerships

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

To enter the partner's competitors and existing partnerships

1 Navigate to the Partners screen.

2 In the Partners list, select the record of the new partner company.

3 Click the Profile view tab.

4 In the Profile form's Show drop-down list, choose Partnership Application.

   The information that the partner filled out in the profile appears.

5 If necessary, click the show more button.

6 Note the existing partners and competitors entered by your partner.

7 In the Profile form's Show drop-down list, choose Partner Profile.

   The Partner Profile appears.

8 In the Profile form, in the field Other Program Memberships, enter the companies that the partner specified as its existing partners. If the specified company does not exist on the account list, you may want to add an account to your account list for this company.

9 In the Partner's Competitors field, enter the companies the partner specified as its competitors. If the specified company does not exist on the account list, you may want to add an account to your account list for this company.

Entering the Partnership Profile

Siebel PRM includes two types of profile:

■ **Partner profile.** Describes the partner company.

■ **Partnership profile.** Describes how your company will work with the partner company.

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

After you register a partner, you should enter the partnership profile.

For more information about the partnership profile, see Chapter 13, "Managing Your Partners."

Giving Your Employees Access to the Partner in My Partners View

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

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

To add an employee to the partner's sales team

1 Navigate to the Partners screen.

2 In the Partners list, select the record of the new partner company.

3 In the More Info form, click the show more button.

   The More Info form is expanded.

4 In the More Info form, click the select button of the Sales Team field.

   The Sales Team Members dialog box appears.

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

Other Ways of Adding Partner Records

Because it is most common for partners to apply through your Web site, only this method was described earlier in this chapter. However, you can add a partner record in three ways:

■ **Approve a partner company.** If a company applied to be a partner through your Siebel PRM Web site, it has entered the information you need for the partner record. To add a partner record, click the Approve button to move it from the Prospective Partners list to the Partners list, as described previously.

■ **Enter a partner company manually.** If a company became a partner without applying through your Siebel PRM Web site, you can enter it in the Partners list manually. When you first set up Siebel PRM, you enter records for your existing partners manually.

■ **Convert a customer account to a partner.** If one of your customers also becomes a partner, you can add it to the Partners list by converting its Account record to a Partner record.

Here, we will look at the other two methods of adding a partner record, which are less common but also are useful.

After adding a new partner in either of these two ways, you must go through the rest of the process of enrolling a new partner, as described previously. The process using the three methods of adding a new partner is shown in Figure 26.
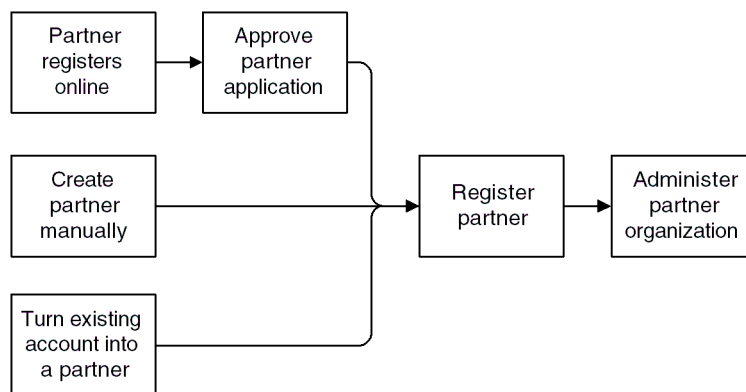
Figure 26.   Process for Adding a New Partner

Adding a New Partner Record Manually

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

- **Add an approved partner manually.** If you have already approved the partner company, you can enter it manually as an approved partner.

- **Add a prospective partner manually and promote it.** If you have not already approved the partner company, you can enter it manually as a prospective partner. Then, after it is approved, you can promote it.

Adding an Approved Partner Manually

If the partner has been approved, enter the Approved Partner record manually. Then complete the registration process and enter the partner profile.

To add an approved partner manually

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Approved Partners.

3 In the Partners list, click the menu button, then click New Record to add a new record to that list.

4 Fill in the blank record and the More Info view with the information about the new partner.

Field	Comments
Name	Enter the name of the partner company.
Site	Enter a description of the physical location of the partner, such as "Headquarters" or "San Francisco."
Address, and so on	Enter the partner company's street address, city, state, zip code, and country.
Main Phone #	Enter the partner company's main phone number.
Main Fax #	Enter the partner company's main fax number.
Email	Enter the partner company's main email address.
URL	Enter the address of the partner's Web site.

Field	Comments
Currency	Enter the currency the partner uses.
Partner Type	Optionally, click the select button and use the dialog box to choose the type of partner you are adding; for example, aggregator, reseller, or service provider.
Partner Tier	Enter the partner tier. Companies might use tiers such as gold, silver, and bronze, or strategic, premier, and alliance.
Industries	Optionally, click the select button, and in the dialog box, choose the industries to which this partner sells.
Territories	Optionally, click the select button, and in the dialog box, choose the territories to which this partner sells.
Ranking	Optionally, enter information about how this partner is ranked against other partners in your partner program, which can help you keep track of your top performing partners.
Stage	Use the picklist to choose the stage of the partner's application. Options are Active, Application Pending, Candidate, and Contract Pending.
Publish	Determines whether this partner will be published in the Partner Locator module. If this flag is checked, then when users search for partners in Partner Locator, this partner will be included in the possible result set.
Organization	Use this field to enter the partner's organization, as described in the next section.
Sales Team	Select the sales team for the partner company. These are your employees who will see this partner company's record in My Partners view.
Price List	Select one or more price lists that this partner company will use.
Alias	Optionally, enter aliases for this partner company, names that the partner company might use in addition to its company name.
Currency	Select one or more currencies that this partner company uses.
Account Type	Select Partner as the account type.
Status	Select the account status: Active, Contract Pending, Marked for Deletion, or Inactive.

Field	Comments
Parent Account	Optionally, enter the parent company of the partner company.
Parent Account Site	Optionally, enter the site of parent company.

5 Click Register, and complete the process of adding the partner company, as described earlier in this chapter in "Enrolling New Partner Companies" on page 135.

Adding a Prospective Partner Manually

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

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

To enter the partner manager's new responsibility

1 Navigate to the User Administration screen.

2 Use a query to find the employee whose new responsibility you want to enter.

3 In the More Info view, click the More/Less button to expand the More Info form.

4 In the New Responsibility field, choose Self-Registered Partner Agent.

To add a prospective partner manually

1 Navigate to the Partner Administration screen.

2 If it is not already selected, from the Show drop-down list, choose Prospective Partners.

3 In the Prospective Partners list, click the menu button, then click New Record to add a new record to that list.

4 Fill in the blank record and the More Info view with the information about the new partner.

5 Click the Profile view tab, and enter the partner profile.

6 At some later time, after the partner has been approved, click the Approve button to move it the Approved Partner list and complete the registration process as described earlier in this chapter in "Enrolling New Partner Companies" on page 135.

Converting a Customer Account to a Partner

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

To convert a customer account to a partner

1 Navigate to the Accounts screen.

2 In the Accounts list, select the customer account that you want to convert to a partner.

3 In the More Info view, select Partner from the Account Type drop-down list.

4 Click the Partner check box to select it.

The account is converted to a partner and will appear in the Partners screen, Approved Partners view, as well as in the Accounts screen.

5 Navigate to the Partner Administration screen.

6 From the Show drop-down list, choose Approved Partners, and then click the Register button to complete the process of adding the partner company, as described in "Enrolling New Partner Companies" on page 135.

Delegated Administration

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

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

Partners have the ability to:

■ Administer users

■ Administer product and literature catalogs

■ Administer communication profiles

Delegated User Administration

When you register a new partner company, you create an organization for that partner company. You can also use the Group Administration screen to create suborganizations under that partner organization. For more information, see "Setting Up the Organization Structure" on page 41.

When you create a partner company, you add at least one user and you add positions and responsibilities used by that company. For more information, see "Enrolling New Partner Companies" on page 135.

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

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

Delegated administrators can create new positions, as described "Adding Positions" on page 160. In most implementations of Siebel applications, each employee has a different position, so it is also necessary to create new positions when you add new employees.

For more information about adding users, see "Adding User Assignments at the Partner Company" on page 146. For more information about responsibilities, see "Assigning Responsibilities to the Partner Company" on page 142. For more information about positions, see "Assigning Positions to the Partner Company" on page 143.

A delegated administrator at a partner company can:

■ Add and Maintain Users

■ Add and Maintain Positions

■ Associate Users with Organizations or Suborganizations

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

Adding Positions

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

■ In My views, users see the data for their own position. For example, in the My Opportunities view, users see all the opportunities where their position is on the sales team.

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

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

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

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

To add a new position at the partner company

1 The partner delegated administrator navigates to the Administration screen.

2 In the Organization Explorer, the partner clicks the + icon next to the organization that the position will be added to.

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

3 The partner clicks the Positions hyperlink under the organization.

The Positions list appears.

4 In the Positions list, the partner clicks New.

5 In the Positions form, the partner enters information about the new position and clicks Save.

Adding Users

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

To add a new user at the partner company

1 The partner delegated administrator navigates to the Administration screen.

2 In the Organization explore, the partner clicks the + icon next to the organization that the user will be added to.

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

3 The partner clicks the Users hyperlink under the organization.

The Users list appears.

4 In the Users list, the partner clicks New.

5 In the Users form, the partner enters information about the new user (including position) and clicks Save.

Giving Users Visibility to Different Organizations

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

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

The brand owner must set up this structure of suborganizations under the partner organization. For more information about organizations, see "Setting Up the Organization Structure" on page 41.

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

NOTE: The delegated administrator associates the user with the organization by giving the user a position in that organization. If the position does not already exist, then before using the following procedure, the delegated administrator must create it, as described in "Adding Positions" on page 160.

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

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

1 The partner delegated administrator navigates to the Administration screen.

2 The partner clicks the + icon next to the organization or suborganization that the user is currently in.

3 The partner clicks the User hyperlink under that organization.

4 In the User list, the partner clicks the name of the user to be associated with an organization.

The Users form appears, with information about that user.

5 The partner clicks the Select button for the Position field.

The Positions Occupied dialog box appears.

6 If the partner does not want the user to be associated with the earlier organization, only with the new one, then in the Positions Occupied dialog box, the partner selects the user's existing position and clicks Delete.

7 In the Positions occupied dialog box, the partner clicks New.

8 In the Add Positions dialog box, the partner clicks a position associated with the organization that this partner will be associated with and clicks OK.

9 In the Positions occupied dialog box, the partner clicks OK.

The user can view the data visible to the organization that this position is associated with.

Delegated Catalog Administration

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

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

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

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

The partner can see all the master data that the brand owner has associated with the catalog, but the partner can only add products and literature.

For more information about creating catalogs, see "Assigning Master Data to the Partner Company" on page 144.

For more information about pricing, see *Pricing Administration Guide*.

To add items to catalogs

1 The partner delegated administrator navigates to the Catalog Administration screen.

2 In the Catalogs list, the partner selects the catalog to which items will be added.

3 In the Categories list, the partner:

    a either selects an existing category to which the item will be added

    b or clicks New and enters information about a new category to which the item will be added

4 The partner clicks either the Products or the Literature view tab.

5 To add an existing product:

    a The partner clicks the Products view tab.

    b In the Products list, the partner selects New Record from the drop-down menu.

    c In the Add Internal Products dialog box, the partner queries to find an existing product, and clicks Go.

    d The partner selects the existing product to be added, and clicks OK.

    e The partner associates the product with a price list, as described in Step 7.

6 To add an existing new product:

    a The partner clicks the Products view tab.

    b In the Products list, the partner selects New Record from the drop-down menu.

    c In the Add Internal Products dialog box, the partner clicks Go to runs an empty query.

   d   In the Add Internal Products dialog box, the partner clicks New.

   e   In the Products form, the partner enters information about the product and clicks Save.

   f   The partner associates the product with a price list, as described in Step 7.

7   To associate a product with a price list:

   a   After adding the product, the Partner clicks its name in the Product list.

      The Product form appears, with the Price Lists list below it.

   b   In the Price Lists list, the partner clicks New.

   c   In the Add Price Lists dialog box, the partner selects a price list and clicks OK.

   d   In the Price Lists list, the partner enters a price for the product in the List Price field.

8   To add a new literature item:

   a   The partner clicks the Literature view tab.

   b   In the Literature list, the partner clicks New.

   c   In the name field of the new record, the partner clicks the select button.

   d   The partner uses the dialog box to select the file that contains the literature.

Delegated Communication Administration

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

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

The drivers and parameters in the Communication Administration screen are set by the brand owner, and they are read-only in the Partner Portal.

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

In the User Profile screen, the delegated administrator can also override the default parameters for individual users. For example, for an email driver, the parameter set in the Communication Administration screen may specify that all messages are plain text. In the User Profile screen, the administrator may override this for specific users to allow them to view HTML messages.

For more information about communication administration, see *Siebel Communications Server Administration Guide*.

To set up drivers and parameters

1 The partner delegated administrator navigates to the Communication Administration screen.

2 In the Communications Drivers list, the partner selects a driver.

3 In the Driver Parameters list, the partner modifies the parameters for that driver by specifying whether parameters are required and specifying the default value of parameters.

To associate a driver with a partner employees

1 The partner delegated administrator navigates to the User Profile screen.

2 In the Show drop-down list, the partner chooses Communication Profile.

3 In the Profiles list, the partner clicks New.

4 In the Name field of the new record, the partner enters a user's name.

5 In the Driver field of the new record, the partner clicks the select button and selects a driver.

6 Optionally, to override default parameters for that driver, in the Profile Parameter Overrides list, the partner selects names of parameters and enters new values for the parameters.

CHAMP Planning   5

This chapter describes how Siebel PRM is used to support the Channel and Alliance Management Process (CHAMP) methodology to develop plans that allow you to work collaboratively with partners.

About CHAMP Planning

The Siebel PRM planning module incorporates the business planning component of the industry-standard Channel and Alliance Management Process (CHAMP) methodology. CHAMP is an established and replicable process that lets brand owners and their business partners work collaboratively to develop and execute effective partnerships.

There are two phases to the CHAMP methodology:

■ **CHAMP Partner Planning.** Partner planning is a facilitated session designed for an internal audience of channel or alliance managers at the brand owner company. The Siebel professional helps the channel managers analyze the partner's business and their own business to find the best opportunities for the two companies to work together. This phase produces a business plan for the partner relationship.

■ **CHAMP Joint Planning.** Joint planning is a facilitated session designed for the brand owner and partner. Using the plan that resulted from the CHAMP Partner Planning session as a foundation, the two organizations meet face-to-face to define their partnership strategy and business plan.

Siebel PRM's CHAMP Planning module lets the user create, capture and track partnership initiatives and partner plans. Partner plans include clearly defined objectives, action plans that detail how each partner company will achieve its objectives, and metrics for measuring the success of each partner in achieving its objectives.

The CHAMP Planning module is included in the Siebel PRM base product. Customers purchase the CHAMP methodology separately.

Business Scenario

Here is an example of a typical business scenario showing how you might use CHAMP Planning:

■ Your company sells computers and Internet services to consumers and to small and medium businesses, depending to a large extent on resellers to go to market. Your company has recently outlined a corporate strategy to identify and penetrate new markets for growth and profitability.

■ As part of this corporate strategy, your company has developed an initiative to enter into the North American financial services market for small and medium businesses. It has named this initiative, "Foray into Financial Services," and has set the revenue goal of $200M for the fiscal year 2001 as part of the initiative.

■ To execute the initiative, the company plans to leverage existing reseller partners who focus on the financial services industry. In addition, it has already run a marketing campaign to recruit new reseller partners who focus on this industry and has selected six new partners.

■ Your company recognizes the importance of carefully mapping out how you will work with each partner. Therefore, your company uses the CHAMP Partner Planning methodology to develop a strategy for each partner. Then, you invite their key partners to a CHAMP Joint Planning session to discuss and agree on the partnership strategy, and develop detailed goals for the partnership. The CHAMP Process provides:

   ■ A clear definition of each company's reasons for partnering, success metrics, and expectations for the partnership.

   ■ A better understanding of each company's business including their growth strategy, products and services, and their sales model.

   ■ The ability to identify, evaluate, and select the business initiatives that will help the partnership succeed.

   ■ The ability to assess and track the revenue potential of the partnership.

   ■ A business plan for developing and executing the partner relationship.

■ You use the CHAMP Planning module in Siebel PRM to create your business plan for the partnership. Your partners use the Siebel Partner Portal to:

- ■ Look up their objectives.

- ■ Design detailed action plans to achieve these objectives.

- ■ Assign its employees as resources to each of the action plans.

- ■ Associate various opportunities with each of its revenue objectives, so it knows how its revenue objectives can be achieved.

■ During the plan period and at the end of the plan period, your company uses the Siebel Partner Manager to track the performance of each of its partners, compare the performance of its partners, and to design incentives for partners based on their performance. At the same time, your partners use the Siebel Partner Portal to compare their actual performance with their objectives.

Using the Siebel PRM CHAMP Planning Module

To use the CHAMP Planning module in Siebel PRM, you perform the following high-level steps:

■ Plan and create a set of appropriate metrics that will allow you to measure your partners' performance. You create these metrics before creating any initiatives: they will let you define specific objectives for your partners.

■ Create a new partnership initiative.

■ Create a specific partner plan for each partner company that participates in the initiative.

■ Execute the plan and evaluate partner performance.

A detailed diagram of the steps the brand owner performs in the CHAMP planning module of Siebel PRM is shown in Figure 27 on page 171.

A detailed diagram of the steps the partner performs in the CHAMP planning module of Siebel PRM is shown in Figure 28 on page 172.

You may have other ways of working with your partners. CHAMP planning is not required, but it does have a track record of improving the execution, effectiveness and overall success of partner relationships.
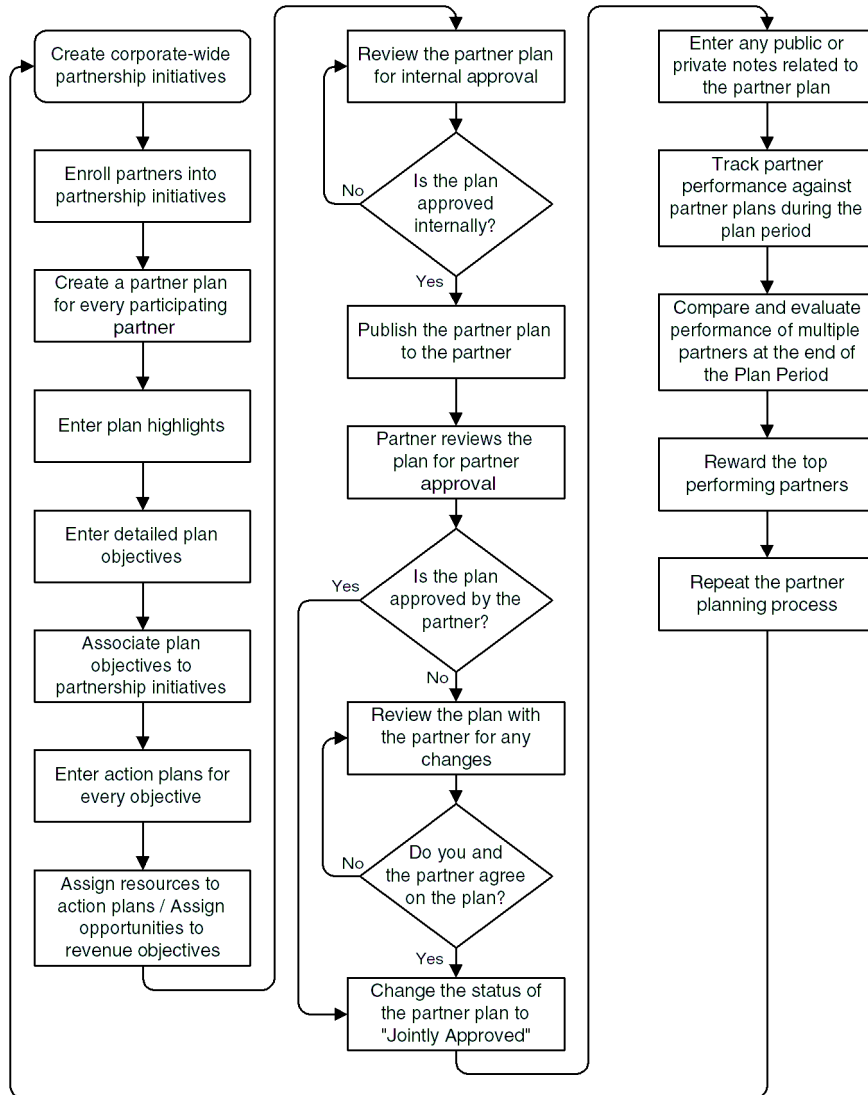

Figure 27.   Using the CHAMP Planning Module of Siebel PRM (Brand Owner's Viewpoint)
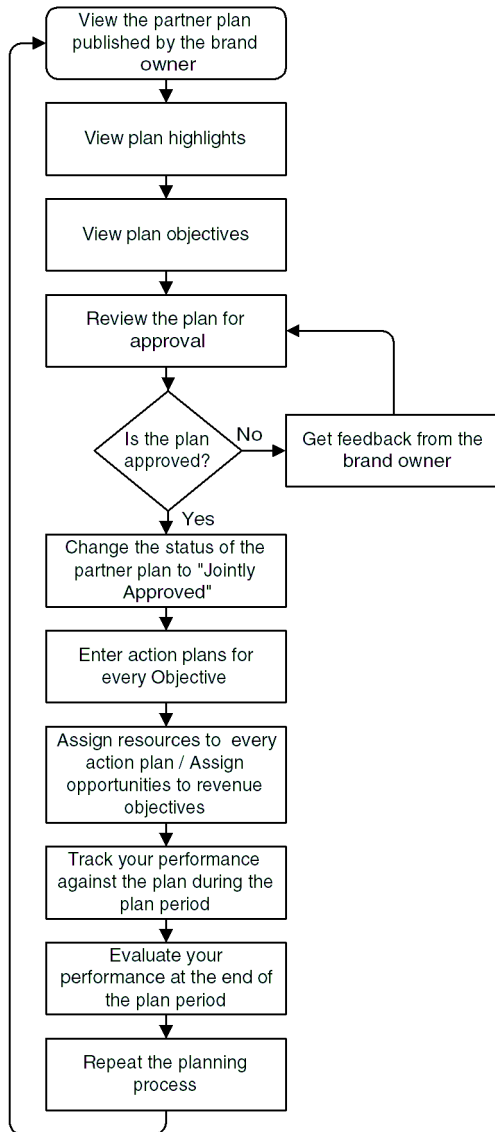
Figure 28.   Using the CHAMP Planning Module of Siebel PRM (Partner's Viewpoint)

Creating CHAMP Metrics

You should create CHAMP metrics before you create any CHAMP plans.

CHAMP metrics will let you categorize CHAMP objectives in ways that will let you measure them. For example, if you are going to develop a series of CHAMP plans with different partners to increase sales of a product, you could create a metric named Sales Revenue. Then, when you evaluate partner performance, you can search on the metric field to list the objectives with Sales Revenue as the metric, so you can compare the target and actual performance of your partners.

In CHAMP planning, performance is measured using the Target and Actual value fields of each objective. The metric defines and categorizes objectives, so you can measure and compare the performance of different partners.

NOTE: You should create all the appropriate metrics before creating any CHAMP plans. Analyze your CHAMP planning program and decide how you want to use metrics to measure and categorize objectives. When you create a specific CHAMP plan, the metrics that you have created will be available in the picklist of the Metrics field of the plan's objectives.

Viewing CHAMP Metrics

If you have an ongoing CHAMP planning program, you should view existing CHAMP metrics before adding any new metrics.

To view CHAMP metrics

1 Navigate to the Application Administration screen.

2 From the Show drop-down list, choose List of Values.

The List of Values list appears.

3 Click Query.

The Find List of Values form appears.

4 In the Type field, enter CHAMP_METRIC_CD.

5 Click Go.

A list of Metrics of the type CHAMP_METRIC_CD appears.

Adding New CHAMP Metrics

Before you add new metrics, analyze your CHAMP planning program and decide what metrics you will need to measure the performance of your CHAMP participating partners.

To add a new CHAMP metric

1 Navigate to the Application Administration screen.

2 From the Show drop-down list, choose List of Values.

The List of Values list appears.

3 In the List of Values list, click the menu button, then click New Record.

The Find List of Values form appears.

4 In the Type field, enter CHAMP_METRIC_CD.

5 In the Order field, enter the order in which this metric will appear on the list of values in the picklist for the Metric field of Objective records.

6 In the Display Value field, enter the name for this metric that will appear in the drop-down list for the Metric field of Objective records.

7 Click Language Name, and select the language for this record.

8 Other fields are optional and are not generally used in CHAMP planning. Complete the other fields only if you have a special reason to do so.

This metric is added to the Metrics drop-down list.

Creating Initiatives

After you have created the appropriate CHAMP metrics, you can begin the CHAMP planning.

The first step in CHAMP planning is to create initiatives to outline your high-level partnership strategies.

A partnership initiative is a large-scale or general business strategy that involves working with partners. For example, if a computer manufacturer wants to work with its partners to penetrate the untapped market segment of financial services, it might create an initiative named "Foray into Financial Services." It might use existing partners, such as value-added resellers, to work on this initiative or form new partnerships with partner companies that have experience in this industry.

As part of creating an initiative, you should specify which partners will participate in it.

To create an initiative, you go through the following process:

■ Add an initiative.

■ Add partners as participants in the initiative.

Adding an Initiative

Begin by adding the initiative.

To add an initiative

1 Navigate to the CHAMP Planning screen.

From the Show drop-down list, initiatives should be chosen by default.

2 In the Partnership Initiatives list, click the menu button, then click New Record.

3 Enter information about the initiative in the fields of the new record and the fields of the More Info form.

Field	Comment
Name	Enter a name for the initiative.
Description	Enter a description of the initiative for your own use.
Period	Select the period for which this initiative is valid.
Start Date	The start date of the selected period is entered automatically, based on your selection in the Period field. This is a read-only field.
End Date	The end date of the selected period is entered automatically, based on your selection in the Period field. This is a read-only field.
Target Market	Select the market segments toward which this initiative is targeted.
Target Amount	Enter the target amount of money you expect this initiative to generate.
Target Quantity	Enter the target quantity you expect the initiative to achieve. For example, if the goal of the initiative is to get new customer accounts, enter the number of new accounts you hope to get.
Actual Amount	After the period of the initiative has ended, you will enter the actual amount of money this initiative generated.
Actual Quantity	After the period of the initiative has ended, you will enter the actual quantity this initiative achieved.
Active	This read-only field indicates whether the initiative is still active. It is automatically set to true on the start date and set to false after the end date.

Adding Partners as Participants in an Initiative

Participants in an initiative are partner companies who are best positioned to work on the initiative. You might also form new partnerships with companies that are especially qualified to work on the initiative.

You must add these partners as participants in the initiative.

To add a partner company as a participant in an initiative

1 Navigate to the CHAMP Planning screen.

From the Show drop-down list, initiatives should be chosen by default.

2 In the Partnership Initiatives list, select the initiative to which you want to add partners.

3 Click the Initiative Participants view tab.

The Initiative Participants list appears.

4 In the Initiative Participants list, click the menu button, then click New Record to add a record to the list.

The Add Partner dialog box appears.

5 Choose one or more partners and click OK.

The Partners are added to the Participating Partners list.

Using Partner Plans

Partner plans allow brand owner companies to work with their partners to set up joint business plans that contribute to initiatives. A partner plan is specific to one partner company. For example, a partner plan could have a specific partner company generate $1M in revenues by selling a 300GHz server to the financial services customers in the north east United States. This plan goal in turn could contribute to a larger initiative to generate $500M from the sales of the new 300GHz server. These plans include specific objectives for each partner, so that you can measure each partner's performance on this initiative.

Initiatives are general company strategies, so they are visible only to your company. Plans are strategies for working with specific partner companies, and so they are visible to your company and to the partner companies that are involved.

To create and use a partner plan, you go through the following process:

■ Create a new plan, which involves the following steps:

   ■ Add a plan and its highlights.

   ■ Add objectives for the plan.

   ■ Associate opportunities with each revenue objective.

   ■ Add an Action Plan for each objective with resources for each Action Plan item.

■ Approve the plan internally and publish it to the partner.

■ Approve the plan jointly with the partner.

■ Optionally, add notes to the plan.

Adding a Plan and Its Highlights

The first step of creating a new plan is to add a new Plan record, with which you will associate the information about the plan.

When you add a plan record, you should also enter the highlights for the plan, which are an overall view of the goal, value propositions, and critical success factors for the plan.

To add a new plan and its highlights from the CHAMP Planning screen

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose All Plans Across Partners.

The Partner Plans list appears.

3 In the Partner Plans list, click the menu button, then click New Record to add a new record to the list.

4 Enter information about the plan in the fields of the new record and of the More Info form.

Field	Comment
Name	Enter a name for the partner plan.
Partner	From the list of partner companies, select the name of the partner for which this plan is being created.
Period	Select the period for which the plan is valid. For example, the picklist might contain 1999 or Q2 2000.
Period Type	This read-only field displays whether the period you selected is a quarter, month, year, and so on.
Start Date	This read-only field displays the start date of the period you selected.
End Date	This read-only field displays the end date of the period you selected.
Status	Select the status of the plan. When you are working on creating the plan, select In Progress. When you submit the plan for internal review, select Pending Review. Later, as the plan is approved by the internal audience, select Internally Approved and when the plan is approved both by the internal and the partner audience, select Jointly Approved.

Field	Comment
Publish to Partner	The field indicates whether the plan is visible to the partner through the Siebel PRM web site. When you are creating the plan, select False. Later, after the plan has been internally approved and is ready to be approved by the partner, select True.
Active	This read-only field indicates whether the plan is still active. It is automatically set to True on the start date and set to False after the end date.
Created Date	The date when the plan record was created is entered automatically.
Created By (Created by Name)	The Login ID of the person who created the plan is entered automatically.
Last Updated (Updated Date)	The date when the plan record was last modified is entered automatically.
Last Updated By (Updated By Name)	The Login ID of the person who last modified the plan is entered automatically.

5 Click the plan name to drill down to the Plan Objectives view of the CHAMP Planning screen, which is used for adding objectives to the plan.

6 To add additional key information about the plan, click the Plan Highlights view tab.

7 In the Plan Highlights form, enter the following information:

Field	Comment
Goal	Enter the plan's goal, describing the overall purpose of the plan. For example, a plan goal could be *Increase market share for the new servers by 20% before the end of 2001 fiscal year.*
Value Proposition to My Company	Enter a description of the plan's value proposition to your company. For example, the value proposition could be *Increased market share for my new servers*.

Field	Comment
Value Proposition to Partner	Enter a description of the plan's value proposition to this partner company. For example, the value proposition could be *New line of business*.
Value Proposition to Market	Enter a description of the plan's value to the market. For example, the value proposition could be *Availability of better and high-performance server products*.
Critical Success Factors	Enter a description of the critical success factors of the plan. For example, some of the critical success factors could be *Timely training and certification of the partner in the new server products* and *Timely execution of focused marketing campaigns*.

Adding Objectives to the Plan

Objectives establish specific goals for the partner plan, which are used later to measure the partner's success in implementing the plan.

When you create an objective, you enter a target for that objective. After the plan has been completed, the actual performance data can be entered manually or automatically.

An objective is defined using metrics. Metrics allow objectives to be measurable and categorized. Objectives can be revenue or nonrevenue. For example, "Generate $3M in revenues" is a revenue objective while "Train 3 employees from the partner company" is a nonrevenue objective. To allow measurement of both these types of objectives, Siebel PRM allows you to define Quantity and Amount metrics:

■ **Quantity.** If the objective is a quantity, enter the target quantity when you create the objective and enter the actual quantity after the objective is completed. For example, if your company is trying to sell a new line of printers, the measure could be the number of printers sold by the partner.

■ **Amount.** If the objective is an amount, enter the target amount when you create the objective and enter the actual amount after the objective is completed. For example, if your company is trying to achieve $3M in sales by selling a new line of printers, you could measure your partner on the amount of sales revenue generated by selling the new line of printers.

To enter plan objectives

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose All Plans Across Partners.

   The Partner Plans list appears.

3 In the Partner Plans list, select the plan to which you want to add objectives.

4 Click the Plan Objectives view tab.

   The Plan Objectives list appears.

5 In the Plan Objectives list, click the menu button, then click New Record to add a new record to the list.

6 Enter information about the objective in the new record and in the More Info form.

Field	Comment
Name	Enter a name for the objective.
Strategy	Enter a general summary of your strategy for how this objective will be achieved.
Metric	Select the metric that will be used to measure the objective.
Initiative	Select the initiative to which this objective is linked.
Internally Accountable	Select this flag if your company is accountable for meeting this objective. (If both your company and the partner company are accountable, select both the Internally Accountable and the Partner Accountable flags.)
Partner Accountable	Select this flag if the partner company is accountable for meeting this objective. (If both your company and the partner company are accountable, select both the Internally Accountable and the Partner Accountable flags.)
Target Quantity	Enter the target value for the metric associated with this objective.
Target Amount	Enter the target value for the metric associated with this objective.

Field	Comment
Condition Clause	Enter a brief description of the condition that must be satisfied.
Training Course	Optionally, select the training course that must be completed as part of the objective.
Product	Optionally, select the product that the partner must sell, be trained on, or work with, as a part of the objective.
Target Industry	Optionally, select industries that are targeted as a part of the objective.
Target Market	Optionally, select the market that is targeted as a part of this objective.
Fund	Optionally, select the market development funds that will be used for the objective.
Actual Quantity	At the end of the plan period, enter the actual value for the metric. This can be done manually, or if the product has been configured with the appropriate workflows or business services, it can be done automatically.
Actual Amount	At the end of the plan period, enter the actual value for the metric. This can be done manually, or if the product has been configured with the appropriate workflows or business services, it can be done automatically.
Condition Met	When the plan has been completed, if the Metric has a condition, select this flag if the condition clause was satisfied, or leave it unselected if the condition clause was not satisfied.
Shared	This flag has the default value of true to indicate that this objective is shared with the partner and thus a CHAMP objective. If you deselect this flag, so the objective is not visible to the partner, then you should select the Internally Accountable flag and deselect the Partner Accountable flag, to indicate that your company is solely accountable for this objective.

7 Continue to add new records to the Objectives list until you have entered the objectives for this plan.

Associate Opportunities with Each Revenue Objective

If an objective is a revenue objective, that is, if it has a metric such as Sales Revenue or some other form of direct revenue, you can associate it with an opportunity or opportunities. This feature allows you to develop a road map of how the revenue target will be achieved in terms of the available opportunities.

You can associate one or more opportunities with each revenue objective.

To associate an opportunity plan with a revenue objective

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose Objectives.

3 In the Plan Objectives list, select the objective with which you want to associate an opportunity.

4 Click the Opportunity Plan view tab.

   The Opportunity Plan list appears.

5 In the Opportunity Plan list, click the menu button, then click New Record.

   The Add Opportunities dialog box appears.

6 Choose one or more opportunities and click OK.

   The Opportunity Plans are added to the Opportunity Plan list.

Add an Action Plan and Resources for Each Objective

You should develop a specific action plan for every objective. An action plan is a list of activities that your company and the partner company will perform to achieve the objective.

When you create the action plan, you give each of its activities a planned start date and completion date. As you execute the plan, you enter the actual start and completion dates for each activity. If an activity is created by a partner or assigned to a partner, your partner should record its progress by using the Siebel Partner Portal to enter the begin and completion dates, and you can check its progress using the Siebel Partner Manager.

You should also specify the resources that you will have available for each activity in the action plan.

To add an action plan and resources for an objective

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose Objectives.

The Plan Objectives list appears.

3 Click the Action Plan view tab.

The Action Plan list appears.

4 In the Action Plan list, click the menu button, then click New Record to add a
new record to the list, and enter information about the first activity of the action
plan in the new record's fields.

Field	Comment
Name	Enter a name for the activity.
Description	Enter a description of the activity.
Type	Enter the type of activity, such as customer visit.
Assigned To	The person who created this activity is automatically entered in this field.
Status	Choose a value to indicate the progress of the activity.
Due	Enter the date on which this activity is due.
Priority	Select a value that indicates the importance or urgency of this activity.
Planned Start	Enter the planned start date of the activity.
Planned Completion	Enter the planned completion date of the activity.
Actual Start	When a user begins working on this activity, the user enters the date in this field.
Actual Completion	When a user completes this activity, the user enters the date in this field.
% Complete	When users work on the plan, they can indicate how close this activity is to being completed.

Field	Comment
Account	Select the account that is related to this activity.
Programs/ Other Comments	Optionally, enter materials, equipment, any program participation information or other miscellaneous comments.
Last Name	Optionally, enter the last name of the contact related to this activity.
First Name	Optionally, enter the first name of the contact related to this activity.
Associated Cost	Optionally, enter the amount of money needed for this activity.
Campaign	Optionally, select a campaign that is associated with this activity.
Fund Request	Optionally, select a fund request associated with this activity.
Site	The location of the selected account.

5 In the Resources list, enter the resources that you will have available for this activity in the Resources form.

Field	Comment
Last Name	Enter the last name of the person who works on this activity.
First Name	Enter the first name of the person who works on this activity.
Job Title	Enter the job title of the person who works on this activity.
External Organization	Enter the organization of the person who works on this activity, if it is not in your own organization.
Email	Enter the email address of the person who works on this activity.
Work Phone #	Enter the work phone number of the person who works on this activity.
Home Phone #	Enter the home phone number of the person who works on this activity.
Alias	Optionally, enter an alias for the person who works on this activity.

Approving the Plan Internally and Publishing It to the Partner

After a partner plan is created, discuss and approve it internally. Then the plan can be published to the partner company, and the partner can view it through the Siebel Partner Portal.

To publish a plan to a partner company

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose All Plans Across Partners.

The Partner Plans list appears.

3 In the record for the partner plan that you want to publish, click the Publish to Partner field.

A check mark appears in the field. The partner can now see the plan on the Siebel Partner Portal.

Approving the Plan Jointly with the Partner

After the plan is published, the partner company can access the plan through the Siebel Partner Portal and can change the action plan by adding new activities, deleting activities, changing the start dates of activities, and so on.

If the partner company has no objections to the plan, it can immediately approve it by using the Siebel Partner Portal to select Jointly Approved in the Status field.

If the partner company has made changes to the plan, your company and the partner company should review the plan jointly, to make changes that are necessary to make it acceptable to both. Once both companies have approved the plan, you can change its status to Jointly Approved.

To change a plan's status to Jointly Approved using the Siebel PRM Partner Manager

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose All Plans Across Partners.

The Partner Plans list appears.

3 In the Status field of the plan, select Jointly Approved.

To change a plan's status to Jointly Approved using the Siebel PRM Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the CHAMP Planning screen.

2 In the Partner Plans list, in the Status field of the appropriate plan, the partner selects Jointly Approved.

Adding Notes to the Plan

You can add notes when you are creating a plan or when working on the plan after it has been approved. Notes let you enter free text comments about the plan. There are two types of notes:

■ **Private Notes.** Can be viewed only by the person who created the note. These notes are used to record miscellaneous information about the plan for your own use.

■ **Shared Notes.** Can be viewed by everyone in your company who has access to that view and record. These notes are used to share miscellaneous information about the plan.

To add notes to a plan

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose All Plans Across Partners.

The Partner Plans list appears.

3 In the Partner Plans list, select the plan to which you want to add a note.

4 Click the Plan Notes view tab.

The Plan Notes list appears.

5 Add a new record to either the Shared Notes or the Private Notes list.

6 Enter the note in the new record's fields.

Field	Comment
Created	The date when the note was created is entered automatically.
Note Type	Enter the type of the note. For example, it might be "Directions" or "Reference."
Note	Enter the text of the note.

Executing the Plan and Evaluating Performance

After the plan has been jointly approved, your company and the partner company can execute the plan.

You should analyze and evaluate the performance of your partner companies while the plan is being executed and after the plan is completed.

Evaluating Partner Performance

One of the powerful aspects of CHAMP Planning is that it allows you to analyze and measure partner performance against the targets set in the partner plans.

While the plan is being executed, you can view the plan periodically to review the partner company's performance. The partner company can also check its performance during the plan period. If the actual values are not on track to reach the target values, the problem can be corrected.

After the plan is completed, you should review performance thoroughly and take action to correct problems and reward good performance.

You evaluate the partner's performance by comparing the values in the Actual Quantity and the Actual Amount fields with the target values that you entered when you created the objective as part of the partner plan.

After the end date for the plan, you can manually enter the actual values. You can also automate the entry of actual values using workflow rules or business services. For example, a workflow could be written to populate to the actual values based on transactional data such as opportunities, service requests, orders, and so on.

For example, if a partner has a revenue objective of $20 million during the plan period of fiscal year 2001, then Siebel Business Process Designer can be configured so that, at the end of the plan period, it adds the revenues associated with all the opportunities this partner closed during the year and enters this computed revenue in the Actual Value field for this objective.

You can also evaluate performance by comparing the performance of different partners.

For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide.*

To evaluate partner performance across multiple partners

1 Navigate to the CHAMP Planning screen.

2 From the Show drop-down list, choose Performance Across Partners.

The Plan Objectives list and Performance Over Time chart appear.

3 Choose values in the following fields of the Objectives list to view the performance of your partners. When a combination of criteria is selected, you will see objectives that meet these criteria.

Field	Comment
Metric	Allows you to choose objectives for a particular metric or the metrics for which there are associated objectives.
	Note: The Performance On A Metric chart and the Performance Over Time chart are valid only if you choose a metric here.
Partner	Allows you to choose objectives for a particular partner or the partners in your portfolio for which you have a partner plan.
Plan	Allows you to choose objectives for a particular partner plan or all partner plans.
Plan Period	Allows you to choose objectives for a particular plan period or all plan periods.

4 Use the Show drop-down list in the chart to change between viewing:

■ Performance Over Time, which displays the performance of your partners across different plan periods for both quantity and amount metrics.

■ Performance On a Metric, which displays the performance of your partners over different metrics for both quantity and amount metrics.

To evaluate partner performance for an individual partner

1 Navigate to the Partners screen.

2 From the Show drop-down list, choose All Partners Across Organizations.

3 In the Partners list, select the record of the partner you want to evaluate.

4 Click the Partner Performance view tab.

5 Choose values in the following fields of the Objectives list to view the performance of your partner. When a combination of criteria is selected, you will see objectives that meet these criteria.

Field	Comment
Metric	Allows you to choose objectives for a particular metric or the metrics for which there are associated objectives. Note: The Performance On A Metric and the Performance Over Time charts are valid only if you choose a metric here.
Partner	Allows you to choose objectives for a particular partner or the partners in your portfolio for which you have a partner plan.
Plan	Allows you to choose objectives for a particular partner plan or all partner plans.
Plan Period	Allows you to choose objectives for a particular plan period or all plan periods.

6 Use the Show drop-down list in the chart to change between viewing:

■ Performance Over Time, which displays the performance of your partners across different plan periods for both quantity and amount metrics.

■ Performance On a Metric, which displays the performance of your partners over different metrics for both quantity and amount metrics.

To display charts evaluating Partner Performance

1 Navigate to the Partners screen.

2 In the Partners list, choose the partner whose performance you want to evaluate.

3 Click the Partner Performance view tab.

By default, Performance Over Time is selected in the Show drop-down list of the Partner Performance list.

4 In the Performance Over Time (Amount) or the Performance Over Time (Quantity) applets, use the drop-down lists to choose the time periods you want to display a chart for and the type of chart you want to display.

Charts are displayed showing the partner's performance during the time period as measured by an amount metric or by a quantity metric.

5 In the Show drop-down list of the Partner Performance list, choose Performance on a Metric.

6 In the Plan Objectives list, use the drop-down lists to choose the metric, the partner, the plan and the plan period that you want to measure performance on.

7 In the Performance On a Metric (Amount) or the Performance On a Metric (Quantity) applets, use the drop-down lists to choose the chart you want to display.

Charts are displayed showing the partner's performance against this metric for an amount metric or for a quantity metric.

Reviewing Partner Performance

After the plan has been completed, you should conduct a thorough review of the partner company's performance. You can see how it performed by comparing the actual values with the target values. You may also want to compare that partner with other partners on similar metrics, to see which partners are performing the best.

Then you should take the following actions based on your evaluation:

■ For nonperforming partners, you can make changes in future action plan items to make them more feasible, you can recommend corrective actions to the partner, or you can take some other corrective action, such as giving the partner more training.

■ Performing partners should be rewarded. For example, you could increase their MDFs, give them more opportunities, give them awards or recognize them for a job well done, or reward them in some other way.

After you have finished working on an initiative and you have evaluated its success, you can start a new planning cycle by creating new initiatives. Your reviews of the partners' performance and of the initiative's performance will help you plan the next initiative more successfully.

Executing the Plan and Evaluating Performance

Sharing Data With Partners 6

This chapter describes how to share different types of data with partners using Siebel PRM. It covers both transactional data and master data.

About Transactional and Master Data

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

■ **Transactional Data.** Data that users can create, read, edit and delete, such as opportunities, accounts, contacts, and service requests. It can be assigned to individuals or groups of individuals (such as a sales team) or to organizations.

■ **Master (or Referential) Data.** Data that users can only read, such as sales literature and service solutions. It is usually assigned to groups of users through access groups.

This chapter will have a separate section on how to work with each of these two types of data, since they are assigned differently.

For more information on making transactional and master data visible to users, see *Security Guide for Siebel eBusiness Applications*.

Sharing Transactional Data with Partners

In Siebel PRM, opportunities, accounts, contacts, service requests, activities, and other forms of transactional data can be assigned either to partner organizations or to individual partner employees.

How the data is assigned determines its visibility. For example:

■ If you assign an opportunity to the partner organization, it will be visible in All Opportunities view for that organization, but it will not be visible in My Opportunities view for any individual.

■ If you assign an opportunity to an individual partner employee, it will be visible to that person in My Opportunities view.

Because it is difficult to keep track of individual partner employees, many brand owner companies prefer to assign transactional data to partner organizations. If you do this, the partner company must give one of its employees the responsibility of looking for new data in All Opportunities view and the other All views, and assigning this new data to the appropriate employee.

Many of the tasks in this section require you to use the All Across Organizations views. Channel managers have these views in the standard configuration of Siebel PRM. If you do not have these views, you do not have the appropriate responsibilities in Siebel PRM. Ask your system administrator to assign you the appropriate responsibilities.

This section provides general information about sharing transactional data with partners. Subsequent chapters provide specific information about sharing data to manage sales, manage service, manage marketing, and manage market development funds.

NOTE: The tasks in this section assume that you have set up the organization structure so each partner company is in an organization of its own. If you have set up multiple partner companies as subdivisions of a single organization, you generally should assign transactional data to an individual and not to an organization. If you assigned these items to an organization rather than an individual, they would become visible to all partner companies, because they are visible to all divisions that are members of that organization. In general, to avoid conflict, you do not want to have the same opportunity, account, contact, or service request available to more than one partner company.

Assigning Opportunities to a Partner

You can assign opportunities to partner employees just as you assign opportunities to your own salespeople—manually or using the Siebel Assignment Manager to create rules that will automatically assign opportunities to partner employees. You can use Assignment Manager to set up rules for assigning opportunities based on territory, potential revenue, industry segment, and many other criteria.

For example, a software company may get many inquiries from people who want to buy its MidMarket products through its Web site. If that company does not sell MidMarket products directly, it can use Assignment Manager to distribute these opportunities to reseller partners based on geography.

Partner employees can also enter opportunities themselves, which are visible to your company as well as the partner.

The opportunity you assign to a company as a whole will appear in the All Opportunities view when the partner accesses Siebel PRM through the Web, but will not appear in the My Opportunities view for any individual. An employee at the partner company who has access to the All Opportunities view must assign the information to an individual.

The employee who enters the opportunity is automatically added to the sales team and defaulted as the primary on the sales team. The primary on the sales team can only be changed by the primary's manager.

For more information about assigaing opportunities to partners, see Chapter 7, "Managing Sales."

For more information about working with opportunities, see the section on opportunities in *Applications Administration Guide*.

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

NOTE: If you want to view the opportunity in the Partner Operations screen, you must assign the opportunity to the partner organization. You can also assign it to an individual.

To assign opportunities to a partner employee manually

1 Navigate to the Opportunities screen.

2 From the Show drop-down list, choose All Opportunities Across Organizations.

3 In the Opportunities list, select the opportunity you want to assign to the partner.

4 In the More Info form, click the select button for the Sales Team Field.

The Sales Team Members dialog box appears.

5 Click New to add a new record to the list.

6 In the Add Employees Members dialog box, click New to add a new record to the list.

7 Select the partner employee you want to assign the opportunity, and click OK.

8 In the Sales Team Members dialog box, click OK.

The partner employee is added to the Sales Team list. This partner employee can now view this opportunity in the My Opportunities view.

To assign opportunities to a partner company manually

1 Navigate to the Opportunities screen.

2 From the Show drop-down list, choose All Opportunities Across Organizations.

3 In the Opportunities list, select the opportunity you want to assign to the partner.

4 In the More Info form, click the select button for the Organization Field.

The Organizations dialog box appears.

5 In the Organizations dialog box, click New to add a new record to the list.

6 In the Add Organizations dialog box, select the organization you want to assign the opportunity, and click OK.

7 Click OK.

This partner organization can now view this opportunity in the All Opportunities view.

To work with the opportunities of a partner

■ Modify an opportunity record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

Viewing a Partner's Opportunities

In some industries, partners develop opportunities, and the brand owner company views these leads, either to follow up on the leads or to review how well they are progressing. Even if your company develops opportunities and assigns them to partners, you can view the opportunities to see how they are progressing, for example, by looking at the partner activities for each opportunity.

When you view opportunities, you can use the audit trail to track changes in the opportunity. By default, whenever a change is entered in the Sales Stage, Opportunity Status, or Expected Revenue field, the audit trail creates a record of how the value was changed stamped with the login of the employee who made the change and the time the change was performed.

The record is stamped with the employee login and the time when the change was performed.

You can view partner opportunities two ways:

■ **The Partner Operations screen.** All partner companies are listed on the Partner Operations screen. Anyone at the brand owner company with access to this screen can select a partner company record and display all its opportunities. This screen displays only opportunities that have the partner organization on their organization team; it does not display opportunities that have been assigned to individual partner employees but not to the partner organization.

■ **The Opportunities screen.** The Opportunities screen displays different sets of opportunities records in different views. In My Opportunities view, it displays opportunities only if you are in the sales team. In All Opportunities view, it displays opportunities if your organization is in the organization team. In All Opportunities Across Organizations view, it displays all opportunities for all partner companies.

In either case, you can drill down on an opportunity to view more information about it, if you have access to the opportunity detail view.

It is usually easiest to use the Partner Operations screen to display the opportunities of a partner company.

To view all the opportunities of a partner company

1 Navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose opportunities you want to view.

3 Click the Opportunities view tab.

The partner's opportunities appear.

Assigning Service Requests to a Partner

Customers often have service requests that one of your partners is most qualified to handle. You may receive the service request through your call center, and then find that a partner should handle it.

You can assign service requests to partner employees manually, or you can use the Siebel Assignment Manager to create rules that will automatically assign service requests to the appropriate partner employee.

You can use Assignment Manager to decide which of your employees or your partner's employees is best able to handle a service request by scoring them on the basis of product expertise, territory, and many other criteria. Assignment Manager sums the scores for all the criteria and assigns the service request to the employee with the highest score.

For example, a large air conditioning manufacturer may rely on third party technicians to service its products. Service requests come in through the manufacturer's call center, and the manufacturer can use Siebel Assignment Manager to assign the service requests to partner technicians based on the partner's location and expertise.

If you have set up a partner company as the only division in its organization, you can assign a service request to the organization instead of to a specific employee.

The service request assigned in this way appears in the All Service Requests view when partners access Siebel PRM through the Web, but it does not appear in the My Service Requests view for any individual. A person at the partner company who has access to the All Service Requests view must assign the service request to an employee.

Employees of partner companies can also enter service requests themselves on behalf of customers, and these are visible to your company as well as to the partner company.

For more information about working with service requests, see the chapter on service requests in *Applications Administration Guide*.

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

NOTE: Because a service request has only one owner, it is automatically visible in the Partner Operations screen under the owner's company. You do not have to explicitly assign the service request to the partner organization to make it visible in the Partner Operations screen.

To assign service requests to a partner employee manually

1 Navigate to the Service screen.

2 From the Show drop-down list, choose All Service Requests Across Organizations.

3 In the Service Requests list, select the service request you want to assign to the partner.

4 In the More Info form for the service request, click the select button of the Owner field.

   The Pick Service Request Owner dialog box appears.

5 Select the record for the partner employee you want to assign the service request, and click OK.

   This partner employee can now view this service request in the My Service Requests view.

To assign a service request to a partner company

1 Navigate to the Service screen.

2 From the Show drop-down list, choose All Service Requests Across Organizations.

3 In the Service Requests list, select the service request you want to assign to the partner.

4 In the More Info form for the service request, click the show more button to display the Organization field, if necessary.

5 In the More Info form for the service request, click the select button in the Organization field.

The Pick Organization dialog box appears.

6 Select the record for the organization you want to assign the service request, and click OK.

This partner organization can now view this service request in the All Service Requests view.

To work with the service requests you have assigned to a partner

■ Modify a record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

Viewing Partner Service Requests

In some business models, the partners receive and log service requests, which you can view for tracking purposes. For example, if a partner is a value-added reseller, customers who need service will go directly to the partner, with whom they already have a business relationship.

You can view partner service requests in two ways:

■ **The Partner Operations screen.** All partner companies are listed on the Partner Operations screen. Anyone at the brand owner company with access to this screen can select a partner company record and display all its service requests.

■ **The Service screen.** The Service screen displays different sets of service request records in different views. In My Service Requests view, it displays service requests only if you are the owner. In All Service Requests view, it displays service requests if your organization is in the organization field. In All Service Requests across Organizations view, it displays all service requests for all partner companies.

To view the service requests of a partner company

1 Navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose service requests you want to view.

3 Click the Service Requests view tab.

The partner's service requests appear.

Assigning Customer Accounts to a Partner

Your partners must have information about your customers to sell or provide service to them. You assign customer accounts to partners in order to give them this information. Employees of a partner company can also add new accounts themselves, and these added accounts are visible to you as well as to the partner company.

If you assign a customer company to a partner organization rather than to an individual partner employee, the assigned account appears in the All Accounts view when partners access Siebel PRM through the Web, but does not appear in the My Accounts view for any individual. An employee at the partner company who has access to the All Accounts view must get the information and assign it to an employee.

For more information about working with accounts, see the section on accounts in *Applications Administration Guide*.

NOTE: If you want to view the account in the Partner Operations screen, you must assign the account to the partner organization. You can also assign it to an individual.

To assign a customer account to a partner employee

1 Navigate to the Accounts screen.

2 From the Show drop-down list, choose All Accounts Across Organizations.

3 In the Accounts list, select the account you want to assign to the partner.

4   In the More Info form, click the show more button to display the Organization field, if necessary.

5   In the More Info view, click the select button for the Account Team field.

The Account Team Members dialog box appears.

6   Click New to add a new record to the list.

The Add Employees dialog box appears.

7   Select the record for the partner employee you want to assign the account, and click OK.

The Account Team Members dialog box appears, with the partner employee added to the list.

8   In the Account Team Members dialog box, click OK.

This partner employee can now view this account in the My Accounts view.

To assign a customer account to a partner company

1   Navigate to the Accounts screen.

2   From the Show drop-down list, choose All Accounts Across Organizations.

3   In the Accounts list, select the account you want to assign to the partner.

4   In the More Info view, click the select button for the Organization field.

The Organizations dialog box appears.

5   Click New to add a new record to the list.

6   The Add Organizations dialog box appears.

7   Select the organization of the partner company you want to assign the account, and click OK.

The Organizations dialog box appears, with the partner organization added to the list.

8   In the Organizations dialog box, click OK.

This partner can now view this account in the All Accounts view.

To view all the accounts of a partner company

1 Navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose accounts you want to view.

3 Click the Accounts view tab.

A list of the partner's accounts appears. This list includes accounts that have been assigned to the partner organization; it does not include accounts that have been assigned to partner employees but not to the partner organization.

To work with the customer accounts of a partner

- Modify a record by selecting a field and changing the information.

- Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

Assigning Contacts to a Partner

Your partners need information about your contacts at your customers in order to sell or provide service to them. You can provide this information by assigning contacts at your customer accounts to partners. Employees of partner companies can also add new contacts, and these added contacts are visible to you.

If you assign a contact to a partner organization rather than to an individual partner employee, this contact appears in the All Contacts view when partner employees access Siebel PRM through the Web, but does not appear in the My Contacts view for any employee. Someone at the partner company who has access to the All Contacts view must assign the contact to an employee.

For more information about working with contacts, see the chapter on contacts in *Applications Administration Guide*.

NOTE: You cannot use the Contacts view of the Partners screen to assign contacts to a partner. Use this screen to enter your own business contacts at the partner company.

To assign a contact to a partner employee

1 Navigate to the Contacts screen.

2 From the Show drop-down list, choose All Contacts across Organizations.

3 In the Contacts list, select the contact you want to assign to the partner.

4 In the More Info form for the contact, click the select button for the Contact Team field.

The Access List dialog box appears.

5 Click Add to add a new record.

The Add Employees dialog box appears.

6 Select the partner employee you want to assign the contact and click OK. You can also select multiple employees and click OK to add them all to the access list.

7 In the Contact Team dialog box, click OK.

To assign a contact to a partner company

1 Navigate to the Contacts screen.

2 From the Show drop-down list, choose All Contacts across Organizations.

3 In the Contacts list, select the contact you want to assign to the partner.

4 Scroll right and click the drop-down arrow in the Organization field.

The Pick Organization dialog box appears.

5 Choose the partner organization, and click OK.

To work with the contacts of a partner

■ Modify a record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

Assigning Activities to a Partner

Managers can assign activities to employees and view their activities. A channel manager at the brand owner company can assign activities to partners in the same way that managers assign activities to employees of their own company. Partners can also add activities, and the activities are visible to their channel manager at the brand owner company.

Depending on your company's business model, you can assign activities to partner employees or just view the activities that they enter.

For more information about working with activities, see the chapter on activities in *Applications Administration Guide*.

NOTE: Generally, you do not use the Activities view of the Partner screen to assign activities to partners. This view is generally used to enter your own activities for your work with the partner company.

To assign an activity to a partner employee

1 Navigate to the Activities screen.

2 From the Show drop-down list, choose All Activities.

3 If you want to create a new activity to assign to the partner employee, in the Activities list, click menu, then click New Record to add a new record to the list, and enter the details of the activity. If you want to assign an existing activity to the partner employee, in the Activities list, select the activity.

4 In the More Info form for the activity, click the select button of the Employees field.

The Employees dialog box appears.

5 Click New.

6 In the Add Employees dialog box, select the partner employee to whom you want to assign the activity, and click OK.

The employee is added to the list of employees.

7 In the Employees dialog box, click OK.

To work with the activities of a partner

- Track a partner employee's activities by doing a query on the Employees field to display that employee's activities. Then you can sort on the Due field to display the activities in chronological order.

- Modify a record by selecting a field and changing the information.

- Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

Viewing a Partner's Quotes

Partner employees enter quotes in Siebel PRM through the Web. Partner relationship managers at the brand owner company can view quotes that partner employees have created in the same way they view quotes their own employees have created.

The Partner Manager's Partner Operation screen lets you view all the quotes of a partner company.

For more information about working with quotes, see *Applications Administration Guide*.

To view the quotes of a partner employee

1 Navigate to the Quotes screen.

2 From the Show drop-down list, choose All Quotes Across Organizations.

3 In the Quotes list, click the menu button, then click New Query.

   A query form appears.

4 In the Sales Rep field, type the login name of the partner employee whose quotes you want to view.

5 In the Quotes list, click the menu button, then click Run Query.

   All the quotes for that partner employee appear.

To view the quotes of a partner company

1 Navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose quotes you want to view.

3 Click the Quotes view tab.

A list of the partner's quotes appears. Quotes are listed here if they are assigned to the partner organization; they are not listed here if they are assigned to a partner employee but not to the partner organization.

Assigning an Order to a Partner Employee

In some industries, it is common for the brand owner company to get orders from customers and then assign them to a partner for fulfillment, outsourcing all or part of the order. For example, if a bank is providing a mortgage for a customer, it may outsource the appraisal request to a partner. You can assign an order to a partner employee or to a partner company.

In other industries, partners get orders from customers. The partner relationship managers at the brand owner company can view all of the orders at a partner company.

To assign an order to a partner employee

1 Navigate to the Orders screen.

2 From the Show drop-down list, choose All Sales Orders Across Organizations or choose All Service Orders Across Organizations.

3 In the Orders list, select the record for the order you want to assign.

4 In the More Info form for the record, click the select button for the Team field.

The Order Team Members dialog box appears.

5 Click New.

The Add Employees Dialog box appears.

6 Select the partner employee to whom you want to assign the order and click OK.

The employee is added to the Order Team Members dialog box.

7 In the Order Team Members dialog box, click OK.

The order will be visible to this partner employee in My Orders view.

To assign an order to a partner company

1 Navigate to the Orders screen.

2 From the Show drop-down list, choose All Sales Orders Across Organizations or choose All Service Orders Across Organizations.

3 In the Orders list, select the record for the order you want to assign.

4 In the More Info form for the record, click the select button for the Organization field.

The Organizations dialog box appears.

5 Click New.

The Add Organizations Dialog box appears.

6 Select the organization of the partner company to which you want to assign the order and click OK.

The organization is added to the Organizations dialog box.

7 In the Organizations dialog box, click OK.

The order will be visible to this partner organization in All Orders view.

To view the orders of a partner company

1 Navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose orders you want to view.

3 Click the Orders view tab.

A list of the partner's orders appears. This list includes orders that have the partner organization assigned to the order; it does not include orders that have partner employees assigned to them but do not have partner organizations assigned to them.

Assigning Assets to Partners

Field service businesses use the Assets screen for tracking and managing assets, which can be installed at customers' locations or can be stored their own warehouses and inventory locations.

Users can select an asset in the Assets screen and click the view tabs to view the service requests, entitlements, warranty, components, uptime data, repairs, preventive maintenance, and other information for this asset, providing the field service business with information used for preventive maintenance, repairs, billing, and marketing.

You can enter this information about assets using either Siebel Partner Manager or Siebel Field Service. Your partners can view it using Siebel Partner Portal.

Because only one partner company provides field service for a given asset, you can assign an asset to only one organization. Then employees of that organization can see the asset in the All Assets view.

If a partner employee owns a service request, that partner employee will be able to view the asset associated with the service request only if the employee has access to the All Assets view.

For more information about working with assets, see *Siebel Field Service Guide*.

For a business scenario illustrating how brand owners and partners can work together using assets, see .

To assign an asset to a partner company

1 Navigate to the Assets screen.

2 In the Assets list, select the asset that you want to assign to the partner company.

3 In the More Info form, click the show more button to expand the form.

4 In the More Info form, in the Organization field, click the Select button.

5 In the Pick Organization dialog box, select the organization of the partner company and click OK.

   The asset and the information associated with it are visible to users in this partner company in the All Assets view.

Assigning Inventory to Partners

Field service businesses use the Inventory screen to manage parts through their life cycles and to monitor parts consumption during order fulfillment and field. Mobile field-service engineers also use the Inventory screen to manage their trunk inventories using a disconnected client.

The Inventory screen lists locations where inventory is stored. Users can select a location and click the view tabs to display the product inventory for the location, pending orders, vendors, and other information, and can also use one view to generate orders.

You can enter this information about inventory and generate orders using either Siebel Partner Manager or Siebel Field Service. Your partners can view this information and generate orders using Siebel Partner Portal.

You can use the Position field of the Inventory Location record to assign the record to one person, who would see it in My Inventory Locations view. In general, you assign the record to a manager at the brand owner company in this way.

To share inventory with partners, assign an inventory location to a partner organization. Then employees of that partner company will be able to see it in All Inventory Locations view.

For more information about working with inventory, see *Siebel Field Service Guide*.

For a business scenario illustrating how brand owners and partners can work together using assets, see "The Brand Owner and Partner Manage Inventory" on page 284.

To assign an inventory location to a partner company

1 Navigate to the Inventory screen.

2 In the Inventory Locations list, select the location that you want to assign to the partner company.

3 In the More Info form, in the Organization field, click the Select button.

4 In the Organizations dialog box, click the New button.

5 In the Add Organizations dialog box, select the organization of the partner company and click OK.

6 In the Organizations dialog box, click OK.

The Inventory location and the information associated with it are visible to users in this partner company in the All Inventory view.

Sharing Files With Partners

You can share files with your partners. For example, you can give them a copy of a report you have written about an opportunity or get a copy of a report they have written.

Both the brand owner and partner company can share files by attaching the files to opportunities, service requests, or fund requests. Both can also view or delete an attachment to an opportunity, service request, or fund request.

NOTE: Do not add an attachment to the partner's record in the Partner screen to share a file with the partner. Attachments to partner records are purely for your own use in managing these partners. To share attachments with a partner, you must add the attachments to opportunities, service requests, or fund requests that the partner can access.

To add an attachment to an opportunity assigned to a partner employee

1 Navigate to the Opportunities screen.

2 From the Show drop-down list, choose All Opportunities Across Organizations.

3 In the Opportunities list, select an opportunity you have assigned to the partner employee.

4 To make sure you have assigned that opportunity to a partner, you can click Sales Team view tab.

The Sales Team view appears, and it must include the partner employee's name. If it does not, find an opportunity that does include the partner on the team, and add the attachment to that opportunity.

5 Click the Attachments view tab to view attachments for that opportunity.

6 In the Attachments list, click the menu button, then click New Record to add a record to that list.

7 In the new record, click the select button in the Attachment Name field.

8 In the Add Attachment dialog box, click Browse next to the File Name text box.

9 Browse to select the file you want, and click Open.

10 In the Add Attachment dialog box, click Add.

To add an attachment to a service request assigned to a partner employee

1 Navigate to the Service screen.

2 From the Show drop-down list, choose All Service Requests Across Organizations.

3 In the Service Requests list, select a service request you have assigned to the partner employee.

4 To make sure you have assigned that service request to a partner, look at the Owner field, which must display the partner employee's name.

5 Click the Attachments view tab to display attachments for that service request.

6 In the Attachments list, click the menu button, then click New Record to add a new record to that list.

7 In the new record, click the select button in the Attachment Name field.

8 In the Add Attachment dialog box, click Browse next to the File Name text box.

9 Browse to select the file you want, and click Open.

10 In the Add Attachment dialog box, click Add.

To add an attachment to a Market Development Fund request

1 Navigate to the Market Development Fund Requests screen.

2 From the Show drop-down list, choose All Fund Requests.

3 In the Fund Requests list, select a fund request of the partner company. The company's name must appear in the Partner field.

4 Click the Fund Request Attachments view tab to display attachments for that fund request.

5 In the Attachments list, click the menu button, then click New Record to add a new record to that list.

6 In the new record, click the select button in the Attachment Name field.

7 In the Add Attachment dialog box, click Browse next to the File Name text box.

8 Browse to select the file you want, and click Open.

9 In the Add Attachment dialog box, click Add.

Sharing Master Data with Partners

Master data is assigned to groups of employees rather than to individual employees. It is most common to assign the following types of master data to your partners:

■ **Literature.** Documents used to sell or understand your products, such as sales brochures and technical backgrounders.

■ **Solutions.** Answers to common service requests.

■ **Training Courses.** Courses administered through the Siebel Partner Manager Training Administration screen.

■ **Products.** The goods or services that you sell.

■ **Price Lists.** The prices to this partner for the goods or services that you sell.

In addition, auction items, competitors, decision issues, events, resolution items, and response templates can also be assigned to categories.

For most master data, visibility is controlled by using catalog visibility. This mechanism lets you categorize master data into catalogs. The value in the catalog's Type field must be *Partner* for the catalog to be visible in the Siebel Partner Portal.

You control visibility to these catalogs using access groups, which are groups of different parties in your Siebel environment. Partner communities are a type of access group that you use to group partners, so you can give groups of partners access to the same catalogs of master data. For example, you might have a catalog specifically for Partner Literature, and you might give all partner communities visibility to this catalog. You might have a catalog for a specific product line, such as a catalog of all literature, solutions, products, and training courses related to your line of server products; and you might put all resellers who sell your line of server products into one partner community, so you can give this group of partners visibility to this server Catalog.

You can also create public catalogs, which have no visibility restrictions, to provide master data visibility to unregistered users and individual partners.

To assign most types of master data to partners, you add the partner company to the appropriate access group. Make sure your channel operations manager has set up the appropriate access groups and categories of master data. Then, any partner company that you add to the access group will have access to all the master data in the categories visible to that access group.

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

For more information about master data, categories, and user groups, see *Security Guide for Siebel eBusiness Applications*.

To assign master data to partners, you must go through the following process:

■ Create categories and access groups

■ Add partner companies to access groups

■ Assign price lists to partner companies

In addition, when you produce new master data, such as new sales brochures, you must add them to the appropriate category to make them visible to your partners.

Creating Categories and Access Groups

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

Though most of the work of setting up catalogs and access groups is done when you first set up Siebel PRM, catalogs and access groups can be added to the application at any time. Some examples of when you would add them are:

■ If you launch a new product line you would probably want to add a new catalog or to add new categories to an existing catalog for information about that product line.

■ If you restructure your partner program, you might have to rework your system of access groups completely.

You would also want to continuously add information to catalogs as more data is created and made available. For example, you would need frequent updates to catalogs as you create new FAQs and new product data sheets or brochures.

For more information on creating categories and access groups, see Chapter 2, "Setting Up Siebel PRM."

Adding Partner Companies to Access Groups

After categories and access groups have been set up properly, you assign a partner company to the appropriate access group to give it visibility to all the master data associated with that access group.

For example, you may have access groups for resellers, value added resellers, service providers, and system integrators. If you form a new partnership with another service provider, you just associate it with the appropriate access group to give it visibility to your sales literature, training courses, and other master data that service providers need. You do this when you first enroll the new partner in your partner program and create a Partner record.

Partner communities are the type of access group used specifically to group partner companies. It is useful to have partner communities, because you can identify which access groups are used to manage partners and which are used for other purposes. When Siebel PRM users add access groups, they should use partner communities.

If you add a new partner program, for example, if you launch a new product to a select group of resellers, you would create new partner communities, so you can give these partners access to the information they need about the product. These partners would probably still belong to the same partner communities as before, but they would also belong to this new one in order to get access to specific information about this new product they are reselling.

You might create several new groups for resellers of this product line, named Authorized, Silver, Gold, and Platinum. Each group would have access to different data sets. You could also use the inheritance rules to set up these groups hierarchically: if you are in the Platinum group you see everything that Gold sees plus the information specific to your group, if you are in the Gold group, you see everything Silver sees plus the information specific to your group; if your are in the Silver group, you see everything authorized resellers see plus the information specific to your group. Inheritance rules give you flexibility in modeling relationships among groups.

If you do not know which access group to use, ask the partner operations manager who set up access groups in your company.

To add a partner company to an access group

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partners list, select the record for the partner company that you want to add to a community.

4 Click the Access Groups view tab.

5 In the Access Groups list, click the menu button, then click New Record.

6 In the Add Access Groups dialog box, select the group or groups to which you want to add the partner. If necessary, use queries to find these groups.

7 Click Add.

Adding Master Data to Categories

Using access groups makes it easy to assign new master data to partner companies. For example, when you create a new sales brochure, you just have to associate it with the appropriate category. If categories and access groups have been set up correctly, the brochure will be visible to all your partners who are in access groups associated with that category.

For example, when you come out with a new datasheet for a new version of an existing product, or when you launch a new product line and build a new catalog about that product line, you go through the following process:

■ If you are creating a new catalog for the new data, ask your channel operations manager to help you set up the new catalog structure and to associate it with the appropriate access groups. To add master data, you must understand the structure of access groups and categories that the partner operations manager has set up.

■ Create the new master data content, such as new literature or new solutions.

■ After the content is finished, add it to the database by navigating to the appropriate screen (for example, the Literature or Solutions screen) and adding a new record for the content file. If you are adding a whole catalog, you would add multiple items on each screen and categorize the items as you add them.

■ Add each item to the correct category, by either navigating to Category view in the screen where you added the item or by navigating to the Catalog Administration screen, displaying the correct category, and adding the item. (If you are associating existing master data with categories, it is generally easier to use the Catalog Administration screen. If you are creating new master data content, it is generally easier to use the Category view of the screen where you added the data.) All of the partners in partner groups associated with these categories will have visibility to the data.

NOTE: The following two procedures show how to associate literature with a category. You associate other types of master data in exactly the same way, using the other view tabs instead of the Literature view tab or using other screens instead of the Literature Administration screen.

To associate literature with a category using the Catalog Administration screen

1 Navigate to the Catalog Administration screen.

2 In the Catalogs list, click the name of the catalog that contains the category with which you want to associate the literature to drill down into that catalog.

A Categories list appears that contains that category.

3 Select the Category with which you want to associate literature.

4 Click the Literature view tab.

The Literature view appears.

5 In the Literature list, click the menu button, then click New Record.

The Add Literature dialog box appears.

6 If necessary, enter criteria for a search and click Go.

7 Select the literature item that you want to associate with the category, and click OK.

The literature is associated with the category.

To associate literature with a category using the Literature Administration screen

1 Navigate to the Document Administration screen.

2 From the Show drop-down list, choose Literature.

3 In the Literature list, add a new literature item, or select the record for the literature you want to associate with a category.

4 Click the Category view tab.

5 In the Category list, click the menu button, then click New Record.

The Add Subcategories dialog box appears.

6 Select the category with which you want to associate the literature, and click OK.

The literature is associated with the category.

Assigning Price Lists to Partner Companies

In order for a partner to access your company's products, you must assign it a price list as well as a buying catalog.

Buying catalogs are catalogs that contain products you sell. They are set up in the same way as other catalogs, which were discussed earlier in this section. For example, you can give different internal divisions and partners access to different buying catalogs in the same way that you give them access to different literature catalogs. A buying catalog must have the value "Buying" in the Catalog Type field.

CAUTION: If you do not set the Catalog Type to Buying, users will be able to see Products in the InfoCenter and All Product Lists View, but they will see an empty Catalog screen.

Buying catalogs do not contain prices. Price lists are stored separately from buying catalogs to give you greater flexibility. You could use this flexibility in several ways, for example:

■ All resellers of a certain product line might have access to the same catalog; you put them all in the same access group, and you give the group access to the catalog. However, you might give resellers a discount that is determined by sales volume, so each reseller needs a different price list.

■ All resellers of a certain product line might have access to the same catalog and to the same price list. In this case, there are no volume discounts and no special deals. Regardless of what product lines you sell, you pay the same price.

Price lists should contain prices for every product; products will only be visible if they are included in the price list as well as in the catalog. Each partner should be assigned a price list; you can assign the same price list to multiple partners, or assign a unique price to each partner if necessary.

For more information about creating pricing models and price lists, see *Pricing Administration Guide*.

To assign a price list to a partner organization

1 Make sure the price list to be assigned has already been created in the Siebel Partner Manager or some other Siebel eBusiness application.

2 Navigate to the Partner Administration screen.

3 From the Show drop-down list, choose Registered Partners.

4 Select the record for the partner company that you want to assign a price list.

5 Click the Price Lists view tab.

The Price Lists list appears.

6 In the Price Lists list, click the menu button, then click New Record.

The Add Price Lists dialog box appears.

7 Select the price list you want to assign to the company, and click OK.

The Price Lists list appears with the price list that you selected added to it.

Managing Sales 7

This chapter describes scenarios that illustrate different ways that you can use Siebel PRM to manage sales. It also describes tools that Siebel PRM provides to help you manage sales.

About Managing Sales

This chapter describes sales scenarios that are examples of how you might use Siebel PRM to manage sales. It is not comprehensive; it simply gives you an idea of the many ways that Siebel PRM can be used. The sales scenarios fall into the following categories:

- **Partner-led sales.** Partner sales agents work on opportunities generated by either the partner or brand owner company.

- **Collaborative sales.** Partners and the brand owner work on opportunities together.

This chapter includes scenarios illustrating how the brand owner and partner can work together. For information about how partners can work with other partners, see Chapter 11, "Partner-to-Partner Collaboration."

In addition to these sales scenarios, this chapter describes these tools that are useful in managing sales:

- **Forecasting.** You have several ways of forecasting partners' sales, and this chapter provides forecasting scenarios.

- **Presentations and Proposals.** You can create templates for presentations and proposals, which your partners can use to generate specific sales presentations and proposals.

- **Incentive Compensation.** You can set up incentive plans that give partners added compensation for selling specific products.

Scenarios for Partner-Led Sales

The partner works on the opportunities in the following scenarios:

■ **Brand owner creates opportunities and assigns them to partners.**

■ **Brand owner creates opportunities and transfers them to partners.**

■ **Partners create and work on opportunities.**

Brand Owner Creates Opportunities and Assigns Them to Partners

In this scenario, opportunities are created by the brand owner company and assigned to specific partners.

This scenario applies to you if you generate opportunities through your marketing campaigns and you can clearly determine which partner should follow up on each opportunity, for example, because each partner specializes in a different geographical territory or in a different product line.

This scenario consists of the following steps:

■ **Step 1. The brand owner enters the opportunities**.

■ **Step 2. The brand owner assigns the opportunities to partners.**

■ **Step 3. Partners view, work on, and update the opportunities.**

■ **Step 4. The brand owner tracks the opportunities.**

Step 1: The brand owner enters opportunities.
You may gather opportunities in a number of different ways, for example, at trade shows, through eMarketing campaigns, or through your Web site. The first step in working with an opportunity is to enter it into your Siebel application. When you enter an opportunity, you are automatically added to the sales team as the primary.

If opportunities have already been entered in another application, you can import them into your Siebel application using Siebel Enterprise Integration Manager (EIM) or Siebel eBusiness Application Integration (EAI). For example, you may get opportunities through a Web site that stores them in another format, and then import them into the Siebel Partner Manager.

For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

For more information about EAI, see *Overview: Siebel eBusiness Application Integration Volume I*.

For more information about working with opportunities, see the section on opportunities in *Siebel Sales User Guide* and *Applications Administration Guide*.

To enter a new opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunities list, click New to add a new record to that list.

3 Enter information about the opportunity in the new record.

Step 2: The brand owner assigns opportunities to partners

Next, assign the opportunities to the appropriate partner. You can do this manually, but it is generally better to use Siebel Assignment Manager to assign the opportunity by creating rules based on partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

For example, you might assign all opportunities in Illinois for one of your product lines to a partner who is located there and has expertise in that product line.

You can assign opportunities to partners in two ways:

■ **Assign opportunities to the partner company.** To assign an opportunity to a partner company, enter that company's organization in the Organization field of the Opportunity record. The opportunity will be visible in the All Opportunities view for that organization, but it will not be visible in the My Opportunities view for any employee of the organization. The partner company will have to designate a person who has visibility to the All Opportunities view to find these new opportunities and assign them to the appropriate employee.

■ **Assign opportunities to partner employees.** To assign an opportunity to a partner employee, you enter the employee's name in the Sales Team field of the Opportunity record. The opportunity will be visible in the My Opportunities view for that employee.

You can either assign the opportunities manually, or you can set up Assignment Manager to assign them automatically. Assignment Manager can add partner organizations to the opportunity's Organization field or add partner employees to the opportunity's Sales Team field.

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

Step 3: Partners view and work on the opportunity
After the opportunity has been assigned, partner employees work on it using the Siebel Partner Portal:

■ If the opportunity was assigned to a partner employee, that employee will be on the sales team and will be able to view the opportunity in the My Opportunities view.

■ If the opportunity was assigned to a partner organization, it will appear in the All Opportunities view, but it will not appear in the My Opportunities view of any employees until partner employees are added to the sales team.

As partner employees work on an opportunity, they update information about that opportunity. For example, they may update activities related to the opportunity, create proposals and presentations for the opportunity, create quotes for the opportunity, and update contacts for that opportunity.

As partner sales agents learn more about the opportunity and get a clearer sense of the deal size, they can update the revenue items associated with the opportunity. The expected revenue, sales stage, and probability fields of the revenue record will give you crucial information about the opportunity.

For more information about opportunities and revenue, see *Siebel Sales User Guide* and *Applications Administration Guide.*

To add a revenue item to an opportunity using the Opportunities screen of the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Opportunities screen.

2 In the Opportunities list, the partner selects the opportunity to which revenue line items will be added.

3 The partner clicks the Revenues view tab.

4 In the Revenues list, the partner clicks the menu button, then clicks New Record.

A new record is added to the revenues list.

5 In the new record, the partner enters information about product, quantity, price, type, and probability.

The revenue field is calculated automatically based on values in the price and quantity fields.

6 In the Revenues list, the partner clicks the menu button, then clicks Update Opportunity.

The Revenue and Expected Revenue fields of the opportunity are updated.

To add a revenue item to an opportunity using customer quotes in the Siebel Partner Portal

1 In the Siebel Partner Portal, the Partner navigates to the Opportunities screen, My Opportunities view.

2 The partner selects the Opportunity record upon which the quote will be based.

3 The partner clicks the Quotes tab, and in the Quotes list, the partner clicks the menu button, then clicks New Record.

4 The partner enters information about the new quote including the name of the quote, the price list that will be used for the quote, order terms, shipping terms, billing details, and shipping details. The prices from the price list that is selected will be entered automatically for the items that are selected.

The partner can see the new quote in the Quotes list.

5 The partner drills down on the quote record that was just created.

6 In the Line Items list, the partner clicks the menu button, then clicks New Record.

7 In the new Line Item record, the partner enters the product, quantity, and other information.

8 The partner continues to add new line items, until the line items for the quote are added.

9 In the Quotes list, the partner clicks Update Opportunity.

The opportunity is updated with information from the line items of the quote. The revenues associated with the quote and the opportunity reflect prices from the selected price list.

Step 4: The brand owner tracks the opportunity

You can track a partner's progress on opportunities by displaying the opportunities, looking at the activities attached to them, and looking at the status field of each opportunity to see if the sale has been closed.

Because you created the lead in this scenario, you are automatically the primary on the sales team. You can drill down on the opportunity record to view detail information about the lead. If you were not on the opportunity sales team, you could view this record in the Partner Operations screen, but you could not drill down into the opportunity record and view details.

NOTE: The Partner Operations screen displays opportunities if the partner company is listed in the Organization field.

To track a partner company's opportunities

1 In the Siebel Partner Manager, navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose opportunities you want to view.

3 Click the Opportunities view tab.

The partner's opportunities appear.

4 Click the name of an opportunity.

The Opportunity form appears.

5 Click the view tabs to display information associated with that opportunity, such as revenues and activities.

Brand Owner Creates Opportunities and Transfers Them to Partners

All the other scenarios in this chapter assume that you are working with partners who use Siebel Partner Portal. However, you can also share opportunities with partners who do not use Siebel Partner Portal by using opportunity transfer to move opportunity data to the partner's customer relation management (CRM) system.

The brand owner can initiate the opportunity transfer. After the opportunity has been transferred, the brand owner may send updates to the partner that update it in the partner's system, and the brand owner may query the partner's system to receive updated information about the opportunity.

If the partner uses Siebel PRM or some other CRM system that supports opportunity transfer, the partner can also initiate an opportunity transfer, then send updates to the brand owner's system, or query the brand owner's system to receive updates.

This business scenario for using opportunity transfer is similar to "Brand Owner Creates Opportunities and Assigns Them to Partners" on page 229. It also applies to you if you generate opportunities through your marketing campaigns and you can clearly determine which partner should follow up on each opportunity. However, it is appropriate when you are working with large partners who have their own CRM systems and do not use Siebel Partner Portal.

This scenario shows how to transfer opportunities and send and receive updates manually. In practice, a brand owner can use Siebel Business Process Designer to automate the process of transferring opportunities to partners and of sending and receiving updates.

This scenario consists of the following steps:

■ **Step 1. The brand owner sets up the ASIs for opportunity transfer.**

■ **Step 2. The brand owner enters an opportunity and transfers it to a partner**.

■ **Step 3. The partner views, works on, and update the opportunity.**

■ **Step 4. The brand owner tracks the opportunity.**

Step 1: The brand owner sets up the ASIs for opportunity transfer

Opportunity transfer uses Siebel's Applications Services Interfaces (ASIs) to synchronize your Siebel database with the partner's CRM system.

Before you can transfer opportunities, you must set up the appropriate ASIs. There are three ASIs used for opportunity transfer—one used to initiate the opportunity transfer data, one used to send updates to the partner's system, and one used to query the partner's CRM system to receive updates.

For more information on setting up ASIs, see Chapter 3, "Setting Up Application Services Interfaces."

Step 2: The brand owner enters an opportunity and transfers it to a partner

The brand owner gathers and enters information about the opportunity in the same way described in the previous scenario, "Brand Owner Creates Opportunities and Assigns Them to Partners" on page 229. However, after entering the data, the brand owner clicks the Transfer Opportunity button, rather than simply assigning ownership of the opportunity to a partner company or partner employee.

To enter a new opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunities list, click New to add a new record to that list.

3 Enter information about the opportunity in the new record.

4 In the Organization field for the new record, select the partner organization.

5 Click the Transfer Opportunity view tab.

6 In the Transfer Opportunity form, click Transfer Opportunity.

A list of partners appears, including all partners who are set up for opportunity transfer.

7 Select the partner you want to transfer the opportunity to, and click OK.

The opportunity is transferred, and the Transfer Status field is updated with a value that specifies whether the transfer was successful.

Step 3: Partners view and work on the opportunity

After the opportunity has been transferred, partner employees work on it in the same way that they would work on any opportunity in their CRM system.

When the opportunity is transferred, all the contacts, revenues, notes, and activities associated with it are also transferred to your partner's CRM system, and converted to the data used in that system. For example, if your partner's system uses the word "lead" instead of "opportunity," the opportunity will appear to the partner as a Lead record.

Step 4: The brand owner tracks the opportunity

You can track a partner's progress on opportunities by using opportunity transfer to query the partner's CRM system and to update the opportunity record and related information back in the Siebel Partner Manager.

For example, if the partner's CRM system supports equivalent data, you can look at the Activity records attached to the opportunity, and look at the status field of each opportunity to see if the sale has been closed. If the partner has updated the revenue associated with the opportunity, you can use the Revenue record in your forecasting.

NOTE: You can receive an update from a partner only if you already transferred the opportunity to the partner or if the partner transferred the opportunity to you.

To query the partner's database to update an opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunities list, select an opportunity that has been transferred to a partner.

3 Click the Click the Transfer Opportunity view tab.

4 In the Transfer Opportunity form, click Receive Update, and click OK to confirm the action.

Siebel Partner Manager queries the partner's system for an update of the opportunity.

Partners Create and Work on Opportunities

In this scenario, opportunities are created by the partner company and logged by the partner company for tracking purposes. Using the Siebel Partner Portal, sales agents at the partner company can enter opportunities they develop, share these opportunities with other agents at the partner company, and track the opportunities as they work on them. Using the Siebel Partner Manager, the channel manager at your company can also track the progress of the opportunities at partner companies.

This scenario consists of the following steps:

■ **Step 1. Partner sales agents enter opportunities.**

■ **Step 2. Optionally, partner sales agents share opportunities with other partner sales agents.**

■ **Step 3. Partner company managers track their reports' opportunities.**

■ **Step 4. The brand owner's channel manager tracks the opportunities at the partner company.**

Step 1: Partners enter opportunities
In this scenario, your partners develop new opportunities and enter them into the Siebel system using the Siebel Partner Portal. When a partner enters an opportunity, the partner is automatically added to the Sales Team field as primary and the partner organization is automatically added to the Organization field.

To enter a new opportunity through the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Opportunities screen.

2 In the Opportunities list, the partner clicks the menu button, then clicks New Record to add a new record to that list.

3 The partner enters information about the opportunity in the new record.

Step 2: Partners share opportunities

Optionally, if the partner sales agent who entered the opportunity thinks that other sales agents at the partner company can help work the opportunity, then the agent can share the opportunity with the other agents by adding them to the Sales Team field. By default, the partner sales agent who added the record is the primary on the sales team.

The partner sales agents on the sales team will see the opportunity whenever they display the My Opportunities view, and they will be able to modify the opportunity record as they work on the opportunity.

For more information about end user's work with opportunities, see *Siebel Sales User Guide*.

To share an opportunity with other partner sales agents

1 In the Siebel Partner Portal, the partner navigates to the Opportunities screen.

2 In the Opportunities list, the partner selects the opportunity to be shared.

3 In the More Info view tab, the partner clicks the select button of the Sales Team field.

   The Sales Team Members dialog box appears.

4 In the Sales Team Members dialog box, the partner uses the query function to find other partner employees to be added to the sales team, clicks the check box next to an employee's name to select that employee, and clicks OK to add all selected employees to the sales team.

5 In the Sales Team Members dialog box, the partner reviews the list to make sure that the individuals who should be on the sales team are listed. Then, the partner clicks OK.

Step 3: Partner company managers track opportunities

Just as sales managers at your own company use Siebel Sales to track their direct reports' progress on opportunities, managers at the partner company can use the Siebel Partner Portal to display the opportunities their direct reports have entered and track their progress on them.

To display your report's opportunities

1 In the Siebel Partner Portal, the partner navigates to the Opportunities screen.

2 From the Show drop-down list, the partner chooses My Team's Opportunities.

Opportunities that have the manager on the sales team or one of the manager's reports as the primary on the sales team appear.

Step 4: The brand owner channel manager tracks opportunities

Although your company does not develop or work opportunities in this scenario, your channel managers can display the opportunities for the partner companies that they manage, in order to track each partner company's progress in selling your products.

In this scenario, the channel manager does not see detail information about the opportunity. To see detail information, the channel manager must be on the sales team for the opportunity. To make detail information visible, you can set up Siebel Assignment Manager to automatically add the channel manager to the sales team when a partner creates an opportunity, as described in the next scenario.

To view the opportunities of a partner company

1 In the Siebel Partner Manager, navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose opportunities you want to view.

3 Click the Opportunities view tab.

The partner's opportunities appear.

Scenarios for Collaborative Selling

This section looks at three different scenarios that let the partner work on sales opportunities in collaboration with the brand owner:

■ **The brand owner creates an opportunity and the brand owner and partner work together on it.**

■ **The partner creates an opportunity and the brand owner and partner work together on it.**

■ **The partner creates an opportunity and assigns it to the brand owner.**

■ **A customer transfers a shopping cart from the brand owner's Web site to a partner.**

Brand Owner Creates Opportunities and Brand Owner and Partner Work Together on Them

In this scenario, opportunities are created by the brand owner company and assigned to specific partner sales agents who will work collaboratively on the opportunity with your sales agents.

This scenario is appropriate for you if you generate opportunities and you use partners' help in following up on opportunities. For example, you may generate opportunities through a national marketing campaign, and when you follow up on these opportunities, you may need help from partners who specialize in training or in systems integration.

This scenario consists of the following steps:

■ **Step 1. The brand owner enters the opportunities.**

■ **Step 2. The brand owner assigns the opportunities to your sales agents.**

■ **Step 3. The brand owner assigns the opportunities to partners.**

■ **Step 4. The brand owner and partner work together on opportunities.**

Step 1: The brand owner enters the opportunities

You may gather opportunities in a number of different ways, for example, at trade shows, through marketing campaigns, or through your Web site. The first step in working with an opportunity is to enter it into your Siebel application.

When you enter an opportunity through the Siebel Partner Manager, you are automatically added as the primary on the sales team.

For more information about opportunities, see the section on opportunities in *Applications Administration Guide*.

To enter a new opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunities list, click the menu button, then click New Record to add a new record to that list.

3 Enter information about the opportunity in the new record.

Step 2: The brand owner assigns opportunities to brand owner sales agents

After you enter the opportunity, it must be assigned to the appropriate sales agent at your company. To assign an opportunity to a sales agent, you enter the employee's name in the Sales Team field of the Opportunity record. Then the opportunity will be visible in the My Opportunities view for that employee.

You can assign the opportunity manually, but it is best to use Siebel Assignment Manager to assign the opportunity by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

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

Step 3: The brand owner assigns opportunities to partners

Next, opportunities are assigned to the appropriate partner. You can do this manually or using Siebel Assignment Manager to assign the opportunity by creating rules based on partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

You can assign opportunities to partners in two ways:

■ **Assign opportunities to the partner company.** To assign an opportunity to a partner company, you enter that company's organization in the Organization field of the Opportunity record. The opportunity will be visible in the All Opportunities view for that organization, but it will not be visible in the My Opportunities view for any employee of the organization. The partner company will have to designate an employee to find new opportunities in the All Opportunities view and assign them to the appropriate employee.

■ **Assign opportunities to partner employees.** To assign an opportunity to a partner employee, you enter the employee's name in the Sales Team field of the Opportunity record. If you do this, the opportunity will be visible in the My Opportunities view for that employee.

You can either assign the opportunities manually, or you can set up Assignment Manager to assign them automatically. Assignment Manager can add partner organizations to the opportunity's Organization field or add partner employees to the opportunity's Sales Team field.

It is usually difficult for you to keep track of the special skills of individual employees in partner companies, so it is more common to assign the opportunity to the partner company and have someone there assign it to the appropriate employee.

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

Step 4: The brand owner and partners work together on opportunities

It is easier for you and the partner to work together on the lead, because both are on the sales team.

Whenever you display the My Opportunities view in the Siebel Partner Manager or the partner displays the My Opportunities view in the Siebel Partner Portal, the shared opportunity will be included in the list. You can select the Opportunity record and:

■ **Share files.** You and the partner can share files (such as Microsoft Word documents) that are useful for this opportunity by clicking the Attachments view tab and adding records to the Shared Attachments list.

■ **Share activities.** You and the partner can log your activities as you work on this opportunity by clicking the Activities view plan and adding records to the Activities list. You will always be current about each other's activities. You can also add future activities to the Activities view tab or add activity plans to the Activity Plans view tab for this opportunity, in order to invite other members of the sales team to work on these activities.

■ **Share notes.** You and your partner can share notes by adding activities to the opportunity and choosing the Note activity type.

■ **Share revenue line items.** As the partner sales agents learn more about the opportunity, they can add revenue line items to the opportunity, which indicate the potential revenue, chance of success, and sales stage. These will be visible to both partner companies.

■ **Create customized sales tools.** You can use the brand owner's prebuilt proposal, presentation, and correspondence templates to create proposals, presentations, and letters based on this opportunity, giving you selling tools that are automatically customized for this opportunity and account.

Partner Creates Opportunities and Brand Owner and Partner Work Together on Them

In this scenario, opportunities are created by the partner companies, and the partners then invoke help from sales agents at the brand owner company, so they can work in a joint selling effort.

This scenario is appropriate for you if your partners generate opportunities and need help working on the opportunity. For example, your partners may generate opportunities by attending trade shows, and when they follow up on these opportunities, they may need help from your sales agents who have special product knowledge.

This scenario consists of the following steps:

■ **Step 1. The brand owner uses Assignment Manager to add its employees to the sales team.**

■ **Step 2. Partners enter opportunities.**

■ **Step 3. The brand owner and partner work together on opportunities.**

Step 1: The brand owner uses Assignment Manager to add its employees to the sales team

To make it easier to work with your partner, set up Siebel Assignment Manager so it automatically adds the appropriate employees from your company whenever partners enter new opportunities. You would probably want to add the following employees from your company:

■ **Channel manager.** Add the channel managers who are responsible for the partner companies that entered each opportunity, so they can track the opportunities. Because the channel managers are on the sales team of the opportunities generated by the partner companies they work with, they will be able to track these opportunities by displaying the My Opportunities view.

■ **Sales agents.** Add the appropriate sales agents to work with the partner sales agent who entered the opportunity. Assignment Manager can choose which of your sales agents to add to each opportunity based on your agents' location, product expertise, workload and availability, and other criteria.

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

Step 2: Partners enter opportunities

Partners develop new opportunities and enter them into the Siebel Partner Portal. When a partner enters the opportunity, that partner is automatically added to the sales team as primary.

You can set up Siebel Assignment Manager so the channel manager and appropriate sales agents at the brand owner company are also added to the sales team automatically when the partner enters the record. Alternatively, the partner can assign the opportunity to these people manually.

To enter a new opportunity through the Partner Portal

1 Navigate to the Opportunities screen.

2 In the Opportunities list, the partner clicks New to add a new record to that list.

3 The partner enters information about the opportunity in the new record.

4 The opportunity can be assigned to appropriate sales agents manually or automatically:

   a The partner can assign the opportunity to appropriate sales agents at the partner company and to the channel manager at the brand owner company by adding these people to the Sales Team field manually. Then the channel manager would add sales agents at the brand owner company to the sales team.

   b You can set up Siebel Assignment Manager to add these people to the Sales Team field automatically.

Step 3: The brand owner and partners work together on opportunities

Having both your sales agents and partner sales agents on the sales team makes it easier to work together on the opportunity.

Whenever your sales agent displays the My Opportunities view in the Siebel application or the partner displays the My Opportunities view in the Siebel Partner Portal, this opportunity will be included in the list. Both your agents and your partner can select the Opportunity record and:

- **Share files.** You and the partner can share files (such as Microsoft Word documents) that are useful for this opportunity by clicking the Attachments view tab and adding records to the Shared Attachments list.

- **Share activities.** You and the partner can log the activities you have done to work on this opportunities by clicking the Activities view plan and adding records to the Activities list. You and the partner will always be up to date about each other's activities. You can also add future activities to the Activities view tab or add activity plans to the Activity Plans view tab for this opportunity, in order to invite other members of the sales team to work on these activities.

- **Share notes.** You and your partner can share notes by adding activities to the opportunity and choosing the Note activity type.

- **Share revenue line items.** As the partner sales agents learn more about the opportunity, they can add to it revenue line items, which indicate the potential revenue, chance of success, and sales stage. These will be visible to both partner companies.

- **Create customized sales tools.** You can use the brand owner's prebuilt proposal, presentation, and correspondence templates to create proposals, presentations, and letters based on this opportunity, giving you selling tools that are automatically customized for this opportunity and account.

Partner Creates Opportunities and Assigns Them to Brand Owner

In this scenario, opportunities are created by the partner companies and assigned to employees of the brand owner company.

This scenario is appropriate for your company if your partners generate opportunities for you and you follow up on each opportunity. For example, your partners may generate opportunities by attending trade shows, and your company may follow up on these opportunities through your national sales force.

This scenario consists of the following steps:

■ **Step 1. Partners enter the opportunities.**

■ **Step 2. The brand owner assigns the opportunities to brand owner employees.**

■ **Step 3. Optionally, the brand owner notifies the employees.**

■ **Step 4. Brand owner employees view and work on the opportunities.**

■ **Step 5. The brand owner tracks the opportunities.**

Step 1: Partners enter the opportunities

In this scenario, your partners develop new opportunities and enter them using the Siebel Partner Portal.

When partner sales agents enter the opportunity, they are automatically added to the sales team as primary. Though the partner sales agents remain on the sales team, they will not work on this opportunity.

To enter a new opportunity through the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Opportunities screen.

2 In the Opportunities list, the partner clicks the menu button, then clicks New Record to add a new record to that list.

3 The partner enters information about the opportunity in the new record.

4 The partner assigns the opportunity to the brand owner company by adding a brand owner organization in the Organization field.

  The opportunity will be visible to everyone in that brand owner organization who can display the All Opportunities view.

Step 2: The brand owner assigns opportunities to its sales agents

Next, you assign opportunities to the appropriate sales agent in the brand owner company. Use Siebel Assignment Manager to assign each opportunity by creating rules based on the employee's special skill, product lines, geography, or other criteria.

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

Step 3: The brand owner notifies sales agents

Optionally, you can notify the sales agent by email when an opportunity is assigned. You set up rules in Siebel Business Process Designer so it sends the email using the communication server when the rules are satisfied.

As with partners, you can notify the employee only when important opportunities are assigned. For example, you can create a workflow rule saying that email should be sent when an opportunity is assigned that involves sales of over $200,000.

Step 4: Brand owner sales agents view and work on the opportunities

Once the opportunity has been assigned to a sales agent at the brand owner company, the employee can view it in Siebel Sales or another Siebel application by displaying the My Opportunities view. Because Siebel products use the same database, you do not have to export this record from Siebel PRM to Siebel Sales.

To view a new opportunity

1 Navigate to the Opportunities screen.

2 Select the new opportunity in the Opportunities list and click the appropriate view tabs to view more details about the opportunity.

Step 5: The brand owner tracks opportunities

As your employees work on these opportunities, you can track their progress using the Siebel Partner Manager.

To track an employee's opportunities

1 Navigate to the Opportunities screen.

2 From the Show drop-down list, choose My Team's Opportunities.

3 Click Query, and use the Query form to search for the employee.

4 Select an opportunity you want to track, and click the Revenues and Activities view tab.

The revenue items and activities attached to that opportunity appear.

A Customer Transfers a Shopping Cart From the Brand Owner's Web Site to a Partner

Shopping cart transfer is used by companies that want to make sales through their own Web site but that want distributors, authorized resellers, or other partners to fulfill the orders. The customer can use Siebel eSales on your Web site to create a shopping cart. Then the customer can transfer the shopping cart to a partner's site for fulfillment.

This scenario consists of the following steps:

■ **Step 1. The brand owner sets up a Web site to sell to customers.**

■ **Step 2. A customer makes a purchase at the brand owner's Web site.**

■ **Step 3. A partner fulfills the order.**

Step 1. The Brand Owner Sets Up a Web Site to Sell to Customers
Before customers can use shopping cart transfer, the brand owner must:

■ Set up a Web site to sell products or services to customers.

■ Set up the Applications Services Interface (ASI) for shopping cart transfer.

In this scenario, the brand owner creates the Web site where customers make purchases. Partners who fulfill orders do not need to have Web sites used to sell to customers.

The brand owner may set up this Web site using Siebel eSales. For more information, see *Siebel eSales Administration Guide.*

Shopping cart transfer uses Siebel's Applications Services Interface to integrate the brand owner's and the partner's order systems. The partner does not need to use Siebel Partner Portal to track and fulfill orders.

For information about setting up the ASI for shopping cart transfer, see Chapter 3, "Setting Up Application Services Interfaces."

Step 2. A Customer Makes a Purchase at the Brand Owner's Web Site

Customers make purchases at this Web site as they would at any Web site, by browsing the catalog and adding items to the shopping cart. The Web site displays an approximate price for the products or services they are ordering.

When they are ready to buy, customers click the Transfer Cart button and choose the partner who will fulfill the order. Then they see the exact price that partner will charge for their order.

To make a purchase using shopping cart transfer

1 The customer browses the catalog at the brand owner's Web site and adds products or services to the shopping cart.

2 The customer clicks Transfer Cart.

   A list of partners who can fulfill the order appears.

3 The customer selects a partner to fulfill the order.

   A screen appears to allow the customer to confirm the order, with the exact price that the selected partner will charge.

4 The customer confirms the order.

Step 3. A Partner Fulfills the Order

After the shopping cart is transferred, it appears as an order in the partner's order management system. The partner company fulfills this order as it would any other order.

Opportunity Management Workflows

With any of the scenarios above that involve the brand owner and partner sharing opportunities, you can use Siebel PRM's opportunity management workflows to send email notification to the brand owner or partner employee who is assigned the opportunity and to that employee's manager when certain conditions are met.

The following opportunity management workflows are available:

■ Opportunity Assigned Notification Process

■ Opportunity Pending Notification Process

■ Opportunity Inactive Notification Process

■ Opportunity Pending Notification Process

■ Opportunity Lost Notification Process

■ Opportunity Won Notification Process

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

Before you can use them, you must activate these workflows, as described in "Activating Workflows" on page 32.

Scenarios for Forecasting Partner Sales

Forecasting lets you monitor the sales pipeline to predict future sales. When salespeople enter opportunities, they specify the total possible revenue and probability of success for that opportunity, which is the basis of forecasting.

By using the forecasting module, analysts at the brand owner company can define a forecast series covering virtually any scenario. They can specify the partners, accounts, products, opportunities, and other data to be included in the forecast series. Then, both brand owners and partners can use the predefined forecasting series to create forecasts of future revenues.

For more information about forecasting, see *Siebel Forecasting Guide*.

NOTE: Partner Forecasting lets you give forecasting credit to partners in multiple ways. You can give credit to a partner if that partner is the primary org in the organization field using the [Opportunity Primary Organization] search specification. You can also give credit to a partner if a partner employee is the primary on the opportunity sales team by using the [Sales Rep Organization] search specification. If you want to give credit to all partner organizations, you can give credit to partners who are the primary organization in the Organization field by using the [Opportunity Primary Organization Partner Flag] search specification. Alternatively, you can give credit to the partner organizations in which the primary sales representative works for a partner organization by using the [Partner] search specification. To support the last alternative, the partner field must be completed on revenue line items in order to be included in the forecast.

In this section, we will look at scenarios specific to partner forecasting. Brand owners can forecast partner revenue and partners can forecast their own revenue. Administrators at the brand owner company can set up forecast series in different ways to automate forecasts, limit visibility, and allow modifications of forecasts at each level of the forecast. We will look at scenarios that fall under the following categories:

- **Brand owner forecasts partner revenue.**

- **Partner managers at the brand owner forecast revenue for the partners they manage.**

- **Partners forecast their own revenue without the brand owner viewing forecasts.**

Brand Owner Forecasts Partner Revenue

The brand owner can forecast partner revenue in a number of different ways. In this section, we will look at the following scenarios:

■ **The brand owner creates a direct quarterly forecast of all partner revenue.**

■ **The brand owner creates a direct annual forecast of revenue for one partner organization.**

■ **The brand owner creates a rollup forecast of annual revenue for one partner organization.**

The Brand Owner Creates a Direct Quarterly Forecast of All Partner Revenue

In this scenario, only one person at the brand owner company, typically the channel manager, creates a forecast.

The forecast series in this scenario covers quarterly revenues that have been committed where a partner employee is the primary on the sales team or the partner organization is the primary in the organization field. Forecasts would be run once every month.

This scenario consists of the following steps:

■ **Step 1. Create a forecast series.**

■ **Step 2. Create forecasts.**

Step 1: Creating the forecast series

Before running a forecast, you must create the forecast series. The forecast series defines forecasts covering all committed, quarterly partner revenue.

To create the forecast series

1 Navigate to the Forecast Admin screen.

2 In the Forecast Series list, click the menu button, then click New Record.

3 Enter the following values in the fields of the new record.

Field	Comment
Name	A name for the forecast, such as Channel Manager's Quarterly Partner Forecast.
Auto Forecast Search Spec	([Partner] is not NULL or [Opportunity Primary Organization Partner Flag] = 'Y') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'
Active	checked
Description	A description of the forecast, such as Channel Manager's Quarterly Partner Forecast - Committed.
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Month
Interval	1
Base Period Type	Quarter

4 Click the Forecasts Series Dates tab.

5 In the Forecast Series Dates list, click the menu button, then click New Record.

6 Enter the following values in the fields of the new record.

Field	Comment
Forecast Date	The date when you want to begin running forecasts. This may be today's date.
Description	A description, such as Q1 Partner Forecast.
Start Date	The start date for the forecast period, such as 1/1/01.
End Date	The end date for the forecast period, such as 3/31/01.

7 To create additional forecast dates, you can select the record you just created, click the menu button, then click Copy Record. By default, the new forecast date is one month later, and the rest of the fields are the same as in the original record. Repeat this step as many times as you would like: as you repeatedly copy records, the Forecast Date continues to change to later dates. Therefore, you may want to change the Start Date and End Date periods to reflect the time frames of the forecasts you want to generate.

8 Click the Forecast Series Participants view tab, and in the Forecast Series Participants list, click the menu button, then click New Record.

The Add Participants dialog box appears.

9 In the Add Participants dialog box, use a query to find the channel manager, select the channel manager's record, and click OK.

Step 2: Creating the forecast
Once the forecast series has been set up, you can run the forecast.

To create the forecast

1 Navigate to the Forecasts screen.

2 In the Forecast list, click the menu button, then click New Record.

3 In the Forecast Series field of the new record, select the forecast series you want to use, such as Channel Manager's Quarterly Partner Forecast.

4 In the Forecast Date field, click the select button.

5 In the Pick Forecast Series Date dialog box, select the record with the forecast date you want and click OK.

The forecast runs.

The Brand Owner Creates a Direct Annual Forecast of Revenue for One Partner Organization
In this scenario, only one person at the brand owner company, typically the channel manager, creates a forecast.

For this forecast, the forecast series defines forecasts that would cover annual revenue of one specific partner (Partner X) and be run once every quarter. The forecast results would provide a running total of forecasted revenues for the year.

You create this forecast series and forecast in the same way that you do in the scenario "The Brand Owner Creates a Direct Quarterly Forecast of All Partner Revenue" on page 252, except that:

■ Because this is an annual forecast that will be run on a quarterly basis, you need to set up the Forecast Series Dates accordingly.

■ You enter the following values in the fields of the Forecast Series record:

Field	Comment
Name	A name for the forecast, such as Channel Manager's Annual Partner X Forecast.
Auto Forecast Search Spec	([Sale Rep Organization] = 'Partner X' or [Opportunity Primary Organization] = 'Partner X') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'
Description	A description of the forecast, such as Channel Manager's Annual Partner X Forecast - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Quarter
Interval	1
Base Period Type	Year

The Brand Owner Creates a Rollup Forecast of Annual Revenue for a Partner Organization

In this scenario, partner employees whose revenues are included in the forecast can run the forecast. In the previous scenarios, only the channel manager could run the forecasts.

This scenario consists of the following steps:

■ **Step 1. Set up the reporting hierarchy.**

■ **Step 2. Create the forecast series.**

■ **Step 3. Create the forecast.**

Step 1: Setting up the reporting hierarchy

In this scenario, forecasts are rolled up through the position hierarchy to the channel manager at the brand owner company. You must set up the position hierarchy so all partner employees whose revenue will be included in the forecast report directly or indirectly to the channel manager at the brand owner company.

The position at the top of the partner company reporting hierarchy, the partner relationship manager, should report to the channel manager at the brand owner company. Partner sales agents whose revenue will be included in the forecast should report directly or indirectly to the partner relationship manager.

You can set up the positions hierarchy using Siebel Partner Manager's Partner Administration Screen, Positions view. For more information about setting up the positions hierarchy, see *Applications Administration Guide*.

Step 2: Creating the forecast series

The channel manager creates a forecast series that defines forecasts that will cover annual revenue of one specific partner (Partner X) and be run once every month. If you have set up the reporting hierarchy correctly, you can create this forecast series to do a rollup forecast.

To create the forecast series

1 Navigate to the Forecast Admin screen.

2 In the Forecast Series list, click the menu button, then click New Record.

3 Enter the following values in the fields of the new record.

Field	Comment
Name	A name for the forecast, such as Rollup Forecast of Annual Partner X Revenue.
Auto Forecast Search Spec	[Sales Rep Organization] = 'Partner X' and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'

Field	Comment
Description	A description of the forecast, such as Rollup Forecast of Annual Partner X Revenue - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	My Revenues
Interval Period Type	Month
Interval	1
Base Period Type	Year

4 Click the Forecasts Series Dates tab.

5 In the Forecast Series Dates list, click the menu button, then click New Record.

6 Enter the following values in the fields of the new record.

Field	Comment
Forecast Date	The date when you want to begin running forecasts. This may be today's date.
Description	A description, such as June Rollup Forecast of Annual Partner X Revenue.
Start Date	The start date for the forecast period, such as 1/1/01.
End Date	The end date for the forecast period, such as 12/31/01.

7 If you want create additional forecast dates, you can select the record you just created, click the menu button, then click Copy Record. By default, the new forecast date is one month later, and the rest of the fields are the same as in the original record.

8 Click the Forecast Series Participants view tab, and in the Forecast Series Participants list, click the menu button, then click New Record.

The Add Participants dialog box appears.

9 In the Add Participants dialog box, use a query to find the people in the brand owner and partner organization who would run the forecast. The positions of these people would include Channel Manager, Partner Sales Representative, Partner Sales Manager, and Partner Relationship Manager. Select these people, and click OK.

Step 3: Creating the forecast

Either the channel manager at the brand owner company, or any employee in the partner company who is below the channel manager in the reporting hierarchy, can run the forecast.

In order for the rollup forecast to run logically and to give employees the ability to adjust their forecasts, employees run and roll up forecasts in an order that is inversely related to their rank. The sales representative runs the forecast first, then the sales manager, then the partner relationship manager, and finally, the channel manager.

However, when managers run forecasts, Siebel PRM automatically runs their reports' forecasts, if the report has not already run the forecast.

To create the forecast

1 In Siebel Partner Portal, partner sales representatives (employees with no reports) navigate to the My Forecasts view.

2 The partner sales representative clicks New to create a new forecast.

3 The partner sales representative selects Rollup Forecast of Annual Partner X Revenue as the forecast series name.

4 The partner sales representative selects June Rollup Forecast of Annual Partner X Revenue as the forecast series date.

5 If the partner sales representative wants to adjust any of the revenue amounts that comprise the forecast, the partner sales representative clicks the Details view tab and modifies the revenue amounts.

6 When the partner sales representative is satisfied with the forecast details, the partner sales representative clicks the rollup button.

The forecast is rolled up to the partner sales representative's manager, the Sales Manager.

7 In the Siebel Partner Portal, the sales manager repeats Step 1 on page 258 through Step 6, rolling up the forecast to the partner relationship manager.

8 In the Siebel Partner Portal, the partner relationship manager repeats Step 1 on page 258 through Step 6, rolling up the forecast to the channel manager at the brand owner company.

9 In the Siebel Partner Manager, the channel manager at the brand owner company repeats Step 1 on page 258 through Step 5.

The channel manager's final rollup forecast includes information from all of the employees whose revenues contributed to the forecast.

Partner Managers at the Brand Owner Forecast Revenue for Multiple Partners

In the following scenario, we will look at how a channel manager forecasts revenue for multiple partner companies:

■ **The brand owner forecasts revenue for all partners that a partner manager oversees.**

The Brand Owner Forecasts Revenue for All Partners that a Partner Manager Oversees

In this scenario, there are multiple channel managers at the brand owner organization. Each channel manager oversees partnerships with a distinct group of partner organizations.

A channel manager at a brand owner organization wishes to track the revenues associated with his or her own partners, but does not want other channel managers to be able to view these forecasts. In this scenario, only the channel manager will be able to see the forecast.

This scenario consists of the following steps:

■ **Step 1. Create the forecast series.**

■ **Step 2. Create the forecast.**

Step 1: Creating the forecast series

The channel manager creates a forecast series that defines forecasts that would cover annual revenue of three specific partners (Partner X, Partner Y, and Partner Z) and be run once every quarter.

To create the forecast series

1 Navigate to the Forecast Admin screen.

2 In the Forecast Series list, click the menu button, then click New Record.

3 Enter the following values in the fields of the new record.

Field	Comment
Name	A name for the forecast, such as Channel Manager's Annual Forecast of Partners X, Y, and Z.
Auto Forecast Search Spec	([Sales Rep Organization] = 'Partner X' or [Sales Rep Organization] = 'Partner Y' or [Sales Rep Organization] = 'Partner Z') and [Committed] = 'Y' and [Calculated Primary Flag] = 'Y'
Description	A description of the forecast, such as Channel Manager's Annual Forecast of Partners X, Y, and Z - Committed.
Active	checked
Detail Depth	Summary Only
View Mode	All Across Organizations
Interval Period Type	Quarter
Interval	1
Base Period Type	Year

4 Click the Forecasts Series Dates tab.

5 In the Forecast Series Dates list, click the menu button, then click New Record.

6 Enter the following values in the fields of the new record.

Field	Comment
Forecast Date	The date when you want to begin running forecasts. This may be today's date.
Description	A description, such as Q1 Partner X, Partner Y, and Partner Z Forecast.
Start Date	The start date for the forecast period, such as 1/1/01.
End Date	The end date for the forecast period, such as 12/31/01.

7 If you want to create additional forecast dates, you can select the record you just created, click the menu button, then click Copy Record. By default, the new forecast date is one quarter later, and the rest of the fields are the same as in the original record. Then you edit the record, for example to change the description so it refers to the new quarter.

8 Click the Forecast Series Participants view tab, and in the Forecast Series Participants list, click the menu button, then click New Record.

The Add Participants dialog box appears.

9 In the Add Participants dialog box, use a query to find the brand owner's Channel Manager, select this record, and click OK. In the Forecast Series form, click Save.

Only the channel manager who was selected will be able to run a forecast based on this forecast series.

Step 2: Creating the forecast

Only the channel manager at the brand owner organization can run the forecasts based on this forecast series.

Once the forecast series has been set up, the channel manager can run the forecast.

To create the forecast

1 The channel manager navigates to the Forecasts screen.

2 In the Forecast list, click New.

3 In the Forecast Series field of the new record, the channel manager selects the forecast series to be used, such as Channel Manager's Annual Forecast of Partners X, Y, and Z.

4 In the Forecast Date field, select the forecast date.

Partners Forecast Their Revenue Without the Brand Owner Viewing Forecasts

Previous scenarios focused on producing forecasts for the brand owner company, though the partner company could sometimes share the forecasts. In the following scenarios, forecasts are produced exclusively for the use of the partner company:

■ **The channel manager creates a direct partner forecast series that only the partner relationship manager can run.**

■ **Multiple partner employees create rollup forecasts.**

The Channel Manager Creates a Direct Partner Forecast Series

In this scenario, the channel manager creates a forecast series that allows only the the partner relationship manager to run a forecast of the partner's own revenue. The partner relationship manager does not share this information with the brand owner.

The steps are identical to the steps outlined in the section "The Brand Owner Creates a Direct Annual Forecast of Revenue for One Partner Organization" on page 254. The only difference is that, instead of adding the channel manager to the Forecast Participants, you add the partner relationship manager at the partner company. Then, only the partner company will be able to run these forecasts of its annual revenue.

Multiple Partner Employees Create Rollup Forecasts

In this scenario, multiple partner employees run a forecast of the partner company's revenue. The partner does not share this information with the brand owner.

The steps required for this scenario are identical to the steps in the section "The Brand Owner Creates a Rollup Forecast of Annual Revenue for a Partner Organization" on page 255. The only difference is that the channel manager at the brand owner company is not included in the Forecast Series Participants list, so the brand owner does not automatically have visibility into the forecast.

Using Presentations and Proposals

Using Siebel PRM's presentation and proposal generation functionality, brand owners can standardize partners' proposals and presentations, make sure that partners are positioning brand owner products appropriately, and reduce the amount of time and money that partners spend generating new proposals or presentations. Using the proposal and presentation generation capabilities, partners can generate customized, professional proposals and presentations that reflect the most current and accurate information available, without having to write any original content themselves.

To do this, you use the Siebel Partner Manager to create templates for sales presentations and sales proposals. When your partners generate an actual presentation, proposal, or correspondence, these templates incorporate information about a specific opportunity or account.

Siebel Presentations generates Microsoft PowerPoint or Lotus Freelance Graphics slide shows. You create the templates for slide shows about your products. When your partner generates a slide show, it is personalized with the customer's name or with other information that you specified when you created the template. The partner can further customize the slide show by changing the order of the slides or adding slides from the presentation library.

Siebel Proposals generates Microsoft Word or Lotus WordPro documents. You create templates for typical sales proposals. When your partner generates a specific proposal, it is personalized with information from the Opportunity or Account record, and also with a quote, if it was included in the template. Your partner can customize it by changing the order of sections or adding sections from the proposal library.

Your partners do not need to have Microsoft PowerPoint, Lotus Freelance Graphics, Microsoft Word, or Lotus WordPro installed locally to use Siebel Presentations and Proposals. Partners only need these applications if they want to edit presentations and proposals.

Your employees can use the same presentation and proposal templates as your partners.

The following scenario illustrates how you would typically create a proposal or presentation.

A sales executive at the brand owner company develops a conceptual plan for a generic template for a presentation or proposal that should be standardized. The plan includes modularized sections that can be added or subtracted, depending on the nature of a specific opportunity. The proposal or presentation includes markers where fields, such as the account name, quote, product name, sales representative, contact, and so on, should be inserted.

The sales executive's staff then uses Siebel Partner Manager to create the presentation or proposal template, including bookmarks where fields will be inserted. The staff also maps these bookmarks to fields from opportunity or account records in the Siebel database. These bookmarks will be replaced by data from the account or opportunity the proposal is based on. Finally, the staff saves the template in the presentation or proposal library.

Then, partner sales agents can use Siebel Partner Portal to generate the presentation or proposal.

For more information about presentations and proposals, see *Applications Administration Guide*.

To generate a presentation or proposal

1 In the Siebel Partner Portal, the partner navigates to the Opportunities or the Accounts screen.

2 The partner selects the opportunity or account record that the presentation or proposal will be based on.

3 The partner clicks the Presentation or Proposal view tab.

4 The partner clicks Auto Presentation or Auto Proposal.

   The system automatically selects the most appropriate presentation or proposal template for the account or opportunity and creates a new record.

5 The partner clicks Generate Draft to generate and display the presentation or proposal in Microsoft PowerPoint, Lotus Freelance Graphics, Microsoft Word, or Lotus WordPro.

6 If the partner has the appropriate application installed locally, then the partner can drill down on the record to display the presentation or proposal in that application.

Using Incentive Compensation

Siebel Incentive Compensation lets you implement incentive compensation plans for both your partners and your employees to help meet your corporate sales goals.

The brand owner wants to give individual partner agents an incentive to generate more revenue from a specific high margin product, *Product X*. The following is an example of how the brand owner can use incentive compensation to help generate sales of *Product X*:

- In the User Administration screen, the brand owner makes sure that all partner employees who will be included in the plan have the Compensable field checked.

- In the Compensation Administration screen, the brand owner creates a filter in the Filters view called Product Filter, which includes these values for the following fields:

  - Type = Product

  - Inclusion = Include All

- The brand owner drills down on the filter and adds Product X to the Products list.

- The brand owner creates an incentive compensation rule in the Compensation Administration screen that includes these values for the following fields:

  - Type = Commission

  - Performance Measure = % Revenue

  - Participant Level = individual

  - Table = Simple

  - Transaction Level = Transaction

  - Earned = Booked

  - Payment Type = Recurring

  - Measure Period = Quarter

- ■ Filter = Product Filter

- ■ The brand owner creates a plan and associates the plan with the rule that was just created, including these values for the following fields:

    - ■ Estimable = checked

    - ■ Period = Year

    - ■ Display = checked

    - ■ Status = Modifiable

    - ■ Active = checked

- ■ The brand owner drills down on the rule and adds a simple table to the plan rules. This table indicates how much a partner agent will be compensated for generating different amounts of revenue from selling Product X.

- ■ The brand owner makes sure the plan is active.

- ■ In the Compensation Tracking screen, the brand owner defines a period for which order data will be imported into the transaction workbook, imports compensable events to the transaction workbook, and then exports data from the transaction workbook into the calculation workbook.

- ■ In the Calculation Runs view, the brand owner defines a name and period for the calculation run and then selects Calculate from the menu to calculate the commissions for the period.

- ■ After verifying the calculation results, the brand owner selects Release from the menu to publish the compensation results to the Compensation screen. This makes the results available to partners who are part of the plan.

- ■ The brand owner can view the Employee Calculations screen to see the compensation paid to each partner employee and can view the Plan Rule Payouts screen to see the total compensation the plan paid out.

- Partner sales agents use the Compensation screen in the Siebel Partner Portal to work with the plan:

  - The Compensation view shows how much incentive compensation they have received.

  - The Plans view shows what plans they can be compensated on.

  - The Quota view shows quotas that apply to them.

  - The Quota Achievement view shows the degree to which they have met their quotas.

  - The Compensation Analysis provides a chart representing the data in the Compensation view.

For more information about incentive compensation, see *Siebel Incentive Compensation Administration Guide*.

Managing Sales

Using Incentive Compensation

Managing Service 8

This chapter describes scenarios that illustrate different ways that you can use Siebel PRM to manage service.

About Managing Service

This chapter describes scenarios that are examples of how you might use Siebel PRM to manage service requests.

You can use Siebel PRM to manage two types of service requests:

■ **Customer Service Requests.** Customers will sometimes log service requests that your partners are responsible for. You can refer customer service requests to partners, work on them collaboratively with partners, or track service requests that partners have logged on behalf of your customers.

■ **Partner Service Requests.** Partners will sometimes log service requests that you must respond to. For example, partners may have questions about your products or about the partnership, or they may need other forms of service.

These scenarios cover a number of methods to manage each type of service request.

To reduce the number of service requests you receive, you can create a repository of FAQs, solutions, and SmartScripts to help partners solve customer's problems and their own problems without logging service requests.

Managing Customer Service Requests

We will look at two groups of scenarios for managing customer service requests:

- **Partner-led customer service.** In these scenarios, the partner is responsible for responding to the service request.

- **Collaborative customer service.** In these scenarios, the brand owner and partner work together to respond to the service request.

Scenarios for Partner-Led Customer Service

There are two common scenarios where the partner responds to customer service requests:

- The partner company receives service requests and logs them in the Siebel Partner Portal for their own tracking purposes.

- The brand owner receives service requests and uses the Siebel Partner Manager to assign them to a partner for fulfillment.

Partner Receives Service Requests and Logs Them for Tracking Purposes

Partners may receive customer service requests directly and log them in the Siebel Partner Portal for tracking purposes. Then partners can use the Siebel Partner Portal to manage service requests within their own organization, and at the same time, give you visibility to these service requests so you can track how well your partners are serving customers.

In this scenario, the partner acts as service provider on behalf of the brand owner, with no intervention from the brand owner. When customers have a problem with the product, they contact the partner with which they have a relationship.

For example, if a partner is a dealer or a value-added reseller, customers who have made purchases from the partner would call the partner directly with service requests.

Using the Siebel Partner Portal, the partner company can enter customer service requests, assign these service requests to the appropriate service agents, and track the service requests as the service agents work on them. Using the Siebel Partner Manager, the channel manager at your company can also track the progress of the service requests at partner companies.

Partners have access to a subset of the service management functionality that you have in the Siebel Partner Manager. Partners can log service requests, add activities and attachments to service requests, and associate solutions from the knowledge base with service requests.

Partners can get help in researching service requests by using the Siebel Partner Portal Solutions screen to display frequently asked questions (FAQs) and their solutions and to display troubleshooting instructions, as discussed later in this chapter.

For more information about working with service requests, see the section on service requests in *Siebel Call Center User Guide* and *Applications Administration Guide*.

This scenario consists of the following steps:

■ **Step 1. The partner logs service requests.**

■ **Step 2. The partner assigns service requests to the appropriate partner service agents.**

■ **Step 3. The partner service agents fulfill service requests.**

■ **Step 4. Partner company managers track service requests.**

■ **Step 5. Optionally, the brand owner's channel manager tracks the service requests logged by the partner company.**

Step 1: Partners log service requests

In this scenario, your partners enter service requests using the Siebel Partner Portal. The partner might get these service requests through its call center or through other customer contacts.

To enter a new service request through the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

From the Show drop-down list, My Customers' Service Requests is chosen by default.

2 In the Service Requests list, the partner selects New Record from the menu to add a new record to that list.

3 The partner enters information about the service request in the new record.

4 Optionally, the partner entering the service request can assign it immediately by selecting a service agent in the Owner field, so the service request appears in the owner's My Service Requests view.

If the service request is not assigned immediately, it will only be visible in the All Service Requests view. The employee responsible for managing the Service Request queue would have to assign it later, as described in the following section.

Step 2: Partner assigns service requests

If service requests are not assigned by the employee logging the service request, a partner employee would have the responsibility of managing the service request queue. This employee would regularly look at new service requests in the Siebel Partner Portal's All Customer Service Requests view, and would use the Owner field to assign each service request to the partner employee who is qualified to respond to it. The appropriate employee could be a service agent who contacts the customer by telephone or a field service agent who goes to the customer site.

The employee who manages the service request queue should have a responsibility that includes visibility to All Service Requests view. For more information about using responsibilities to control visibility to views and about the responsibilities available in the seed data, see the section about defining partner responsibilities in Chapter 2, "Setting Up Siebel PRM."

To assign a service request to a partner service agent

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

2 From the Show drop-down list, the partner chooses All Customers' Service Requests.

3 In the Service Requests list, the partner selects the service request to be assigned.

4 In the More Info view tab, the partner clicks the select button of the Owner field.

The Pick Service Request Owner dialog box appears.

5 In the Pick Service Request Owner dialog box, the partner selects a partner employee to be added as the owner of the service request and clicks OK.

Step 3: Partners fulfill service requests

Partner service agents and field technicians who fulfill service requests would regularly navigate to the Siebel Partner Portal's Service screen and view the My Customers' Service Requests view. They would research and respond to new customer service requests.

Alternatively, they could be notified automatically by email whenever a new service request is assigned to them. The brand owner would set up Siebel Business Process Designer to send this email. For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

When they finish working on a service request, they change the status to closed.

Step 4: Partner company managers track service requests

Managers at the partner company can use the Siebel Partner Portal to view the service requests that their direct reports own and track progress on them.

To view your report's service requests

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

2 From the Show drop-down list, the partner chooses My Team's Customers' Service Requests.

The service requests owned by this partner company manager's reports appear.

Step 5: The brand owner channel manager tracks service requests

Although your company does not develop or work on service requests in this scenario, your channel managers can view the service requests for the partner companies that they manage. This lets them track each partner company's progress in fulfilling service requests.

Optionally, you can also produce the Partner Operations report, which lists the service requests a partner is working on, as well as that partner's opportunities, accounts, and so on.

To view the service requests of a partner company

1 In the Siebel Partner Manager, navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose service requests you want to view.

3 Click the Service Requests view tab.

   The partner's service requests appear.

Brand Owner Receives Service Requests and Assigns Them to the Partner

In this scenario, service requests are received and entered by the brand owner company, and assigned to specific partners.

This scenario would be appropriate, for example, if the brand owner runs a call center where customers call to report problems with products they purchased directly from the brand owner or through a reseller. The call center agents log the service requests, which then are assigned either automatically or manually to a partner with the appropriate skills to solve the customer's problem. The partner the service request was assigned to retrieves the service request through Siebel Partner Portal, and then assigns it either to a partner employee who is a service agent, who telephones the customer, or to a partner employee who is a field service technician, who visits the customer's house. After solving the problem, the service agent changes the service request's status to closed using the Siebel Partner Portal. A service manager at the brand owner company can track the status of service requests to monitor customer satisfaction.

For more information about working with service requests, see the section on service requests in *Siebel Call Center User Guide* and *Applications Administration Guide*.

This scenario consists of the following steps:

■ **Step 1. The brand owner enters the service requests**

■ **Step 2. The brand owner assigns the service requests to partners**

■ **Step 3. Partners view and work on the service requests**

■ **Step 4. The brand owner tracks the service requests**

Step 1: The brand owner enters service requests

Your call center agents, field service representatives, or other employees who work with your customers receive service requests and enter the service requests in the Siebel application that they use, which may be Siebel Partner Manager, Siebel Call Center, Siebel Service, or Siebel Field Service. Because Siebel applications use the same database, these service requests will be visible to you in Siebel Partner Manager even if they are entered in Siebel Call Center, Siebel Service, or Siebel Field Service.

To enter a new service request

1 Navigate to the Service screen.

2 In the Service Requests list, click the menu button, then click New Record to add a new record to that list.

3 Enter information about the service request in the new record.

4 Assign the service request to a partner service agent, as described next.

Step 2: The brand owner assigns service requests to partners

Next, service requests are assigned to the appropriate partner. You can do this manually, but it is generally better to use Siebel Assignment Manager to assign the service request by creating rules based on geography, partners' skills, expertise in a specific product, language ability, territory, workload and availability, or other criteria.

For example, you might assign service requests from Spanish-speaking customers for one of your product lines to a partner company that has expertise in that product line and employees who speak Spanish.

You can set up Assignment Manager either to assign service requests to partner companies or to assign service requests to individuals, who may be service agents at the partner company or at your own company, depending on which agent is most qualified to deal with each service request.

You can assign service requests to partners in two ways:

- **Assign service requests to the partner company.** To assign a service request to a partner company, you enter that company's organization in the Organization field of the Service Request record. The service request will be visible in the All Service Requests view for that organization, but it will not be visible in the My Service Requests view for any employee of the organization. The partner will have to designate an employee to find new service requests in the All Service Requests view and assign them to the appropriate employee by entering the employee's name in the Owner field of the Service Request, which is visible after you click the More/Less button of the More Info form.

- **Assign service requests to partner employees.** To assign a service request to a partner employee, you enter the employee's name in the Owner field of the Service Request record. The service request will be visible in My Service Requests view for that employee.

It is usually difficult for you to keep track of the special skills of individual employees in partner companies, so it is more common to assign the service request to the partner company and have an employee there assign it to the service agent.

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

Step 3: Partners view and work on service request
After the service request is assigned, the partner employees work on it using the Siebel Partner Portal.

- If the service request is assigned to a partner employee, that person will be the owner of the service request and can view it in the My Service Requests view.

■ If the service request is assigned to a partner organization, employees in that organization can view that service request in the All Service Requests view, but the service request will not appear in any employee's My Service Requests view until a partner employee is added in the Owner field.

When service agents resolve a service request, they change its status to Closed.

To view a service request and change its status to Closed

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

2 In the Service Requests list, the partner selects the service request.

3 When the service request has been resolved, the partner selects Closed in the Status field.

Step 4: The brand owner tracks service requests

You can track your partner's progress on their service requests by displaying the service requests and viewing the status fields to see which service requests have been closed.

To track a partner's service requests

1 In the Siebel Partner Manager, navigate to the Partner Operations screen.

2 In the Partners list, select the partner company whose service requests you want to view.

3 Click the Service Requests view tab.

The partner's service requests appear.

4 If you want to see more details about a service request, click its number in the Service Request list.

Scenarios for Collaborative Customer Service

This section describes two scenarios that let the partner work on service requests in collaboration with the brand owner:

■ **The partner logs the service request and gets help by working on it jointly with brand owner.**

■ **The partner logs the service request and transfers it to the brand owner.**

Partner Logs Service Requests and Works on Them with the Brand Owner

In this scenario, the partner acts as the primary service provider but collaborates with the brand owner to get service issues resolved when the partner receives service requests that require expertise from the brand owner.

For example, you might use this scenario if your partner is a value-added reseller of your company's complex manufacturing equipment. Your partner's field service technicians are on site installing new equipment, and have a problem with the machine's software that require a software patch. The field service technician would log a service request in the Siebel Partner Portal's Self-Service screen to get help from the brand owner and to request the patch.

This scenario consists of the following steps:

■ **Step 1. Partners log service requests.**

■ **Step 2. Partner uses self-service to get help from the brand owner.**

■ **Step 3. The brand owner responds to the partner's self-service request.**

Step 1: Partners log service requests

In this scenario, your partners enter service requests using the Siebel Partner Portal. The partner might get these service requests through its call center or through other customer contacts.

To enter a new service request through the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

2 In the Service Requests list, the partner clicks New to add a new record to that list.

3 The partner enters information about the service request in the new record.

Step 2: Partners use self-service to get help

To get help in solving the problem that they logged, the partners can enter a service request in the Self-Service screen of the Siebel Partner Portal.

To enter a new self-service request through the Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Self-Service screen.

2 In the Service Requests list, the partner clicks New to add a new record to that list.

3 The partner enters information about the service request in the new record.

Step 3: The brand owner responds to the partner's self-service request

The partner's self-service request will be in the same queue as the other service requests that come to your company, and it will be assigned to a service agent in your company in the same way as other service requests are assigned. For example, you can configure Assignment Manager to assign the service request to a service agent based on your service agents' expertise, availability, or other factors.

Because your Siebel applications share a single database, this service request will appear in the Siebel Partner Manager, in Siebel Service, or in any other Siebel application that your service agents use to track service requests.

After your service agent responds to the self-service request, your service agent and the partner can continue to work together on the service request, if necessary, by logging updates to the service request.

To respond to a service request

1 Navigate to the Service screen.

The Service Request list appears, with the service requests that have you as owner.

2 After researching the service request, you as service agent can enter an activity, which will appear as an update on the Siebel Partner Portal. Further updates logged by the Partner through the Self-Service screen will be visible to you in the Activities list in the Service screen of the Siebel Partner Manager.

3 You as a service agent can also add Attachments and Solutions to the Service Request record. The partner can view these through the Siebel Partner Portal as attachments to the service request in the Self-Service screen.

Partner Logs Service Requests and Transfers Them to the Brand Owner

In this scenario, service requests are created by the partner companies and assigned to employees of the brand owner company. This scenario is appropriate for you if your partners receive customer service requests, and your company is responsible for fulfilling the service requests.

You might use this scenario in many different businesses. To give just one example, you could use it if your partners are resellers of satellite TV services, who take the orders for the service in the store, while the brand owner handles the actual installation of the satellite dish and the decoder. Whenever the reseller receives an order, the reseller logs a service request and assigns it to the brand owner, so the brand owner can dispatch a field service technician to perform the installation.

This scenario consists of the following steps:

■ **Step 1. Partners enter the service requests and Assignment Manager assigns them to the brand owner company.**

■ **Step 2. The brand owner assigns the service requests to its employees.**

■ **Step 3. Brand owner employees view and work on the service requests.**

■ **Step 4. The brand owner tracks the service requests.**

Step 1: Partners enter service requests

In this scenario, your partners receive new service requests and enter them into the Siebel application using the Siebel Partner Portal.

You must set up Siebel Assignment Manager to assign service requests to the appropriate employee or organization in your company when partners enter service requests. Assignment Manager can assign service request based on employees' skills, product expertise, geography, or other criteria.

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

To enter a new service request through the Siebel Partner Portal

1 In the Siebel Partner Portal, the partner navigates to the Service screen.

2 In the Service Requests list, the partner clicks New to add a new record to that list.

3 The partner enters information about the service request in the new record.

Assignment Manager has been set up to assign the service request to the appropriate organization or employee in your company.

Step 2: The brand owner assigns service requests to its employees

If Assignment Manager has assigned the service request to an organization in your company, you must assign service requests to the appropriate service agent or field service technician in your company.

You can assign service requests manually. An employee at your company with access to the All Service Requests view can assign the service request to the appropriate employee, by choosing the employee name in the service request's Owner field.

Alternatively, you may have set up Assignment Manager to assign service requests to the appropriate employee automatically when they were entered by the partner.

In either case, the service agent responsible for the request will see it in the My Service Requests view.

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

Step 3: Brand owner employees view and work on service request

When the service request has been assigned to your service agent, the agent can view it in Siebel Partner Manager, Siebel Service, Siebel Call Center, or another Siebel application by displaying the My Service Requests view of the Service screen. Because Siebel applications use the same database, you do not have to export this record from Siebel PRM to other Siebel applications.

To view a new service request

1 Navigate to the Service screen.

2 In the Service Requests list, select the new service request.

3 Click the appropriate view tabs to view more details about the service request.

4 After researching the service request and solving the customer's problem, the service agent chooses Closed in the Status field of the service request.

Step 4: The brand owner tracks the service request

As your employees work on these service requests, you can track their progress using the Siebel Partner Manager, or their managers can track their progress using Siebel Service. Again, because Siebel applications use the same database, you do not have to worry about exchanging data among different Siebel applications.

You can track your employees' progress as they work on their service requests by displaying the service requests, viewing the activities attached to it, and checking the status field to see if the service request has been closed.

Your service agents' managers can track their reports' service requests by displaying the My Team's Service Requests view.

To track employee's service requests

1 Navigate to the Service screen.

2 From the Show drop-down list, choose My Team's Service Requests.

3 In the My Teams Service Requests list, select a service request you want to track.

4 Click the Activities view tab.

The activities attached to that service request appear.

Scenarios for Field Service

Many brand owners use partners to provide field service and other types of service that require use of parts to service assets that customers have purchased. Siebel PRM provides the Inventory screen and the Assets screen to support this sort of service.

In this section, we will look at two typical scenarios for this sort of service:

■ **The brand owner and partner manage inventory.**

■ **The partner responds to service requests for assets.**

The Brand Owner and Partner Manage Inventory

Siebel PRM allows the brand owner and partners to work together to manage inventory, such as the spare parts that the partner needs to do repairs.

The brand owner can share inventory with the partner. The partner can locate inventory and use it to service customers. The brand owner can automatically warn the partner if the inventory of a given part is too low.

For more information about working with inventory, see *Siebel Field Service Administration Guide*.

This scenario consists of the following steps:

■ **Step 1: The brand owner sets up an inventory location for the partner.**

■ **Step 2: The brand owner transfers products to the inventory location.**

■ **Step 3: The partner transfers inventory to inventory sublocations.**

■ **Step 4: The partner service agent finds and uses needed parts.**

■ **Step 5: The brand owner monitors partner inventory level.**

Step 1: The brand owner sets up an inventory location for the partner

First, the brand owner sets up one primary inventory location for each partner who will use inventory. The organization for this inventory location should be the partner's organization, so other partners cannot see this inventory.

To set up an inventory location for a partner

1 Navigate to the Inventory screen.

2 In the Inventory Locations list, click New to create a new record.

3 Fill in the fields of the new record:

    a In the More Info form, click the show more button to expand the form.

    b In the Organization field, select the partner organization.

    c In the Owner field, select a partner position in the specified partner organization.

Step 2: The brand owner transfers products to the inventory location

Next, the brand owner associates products with the partner's inventory location. These may be transferred from the brand owner's inventory location, or they may be transferred from a virtual location that the brand owner created to hold products that will be transferred to partners.

To transfer a product to the partner's inventory location

1 Navigate to the Inventory Transaction screen.

2 In the Inventory Transactions list, click New to create a new record.

3 Fill in the fields of the new record

    a In the Source Location field, choose either your own inventory location or the virtual location used to hold products for partners.

    b In the Destination Location field, choose the inventory location you created for the partner.

    c In the Commit field, click the field to add a check mark, completing the transaction.

Step 3: The partner transfers inventory to inventory sublocations

The partner service administrator logs into the Siebel Partner Portal and sees that this inventory location has been assigned to them.

A small partner company with only one physical location for inventory could use this inventory location to represent its physical inventory location.

A larger partner company with several physical locations for inventory would create a subinventory location under this inventory location to represent each of its physical inventory locations. Then it would transfer the inventory from the inventory location that the brand owner created to these inventory locations.

To transfer inventory to product inventory locations

1 The partner service administrator navigates to the Inventory screen.

2 In the Inventory Locations list, the partner adds a new record representing each of the partner company's physical inventory locations.

3 The partner navigates to the Inventory Transfer screen.

4 In the Inventory Transactions list, the partner adds a new record and fills in its fields:

    a In the Source Location field, the partner chooses the inventory location that the brand owner created.

    b In the Destination Location field, the partner choose one of the inventory location created to represent the partner's physical inventory locations.

5 The partner continues to create new Inventory Transaction records until all of the inventory is transferred to locations representing their partner's physical inventory locations.

Step 4: The partner service agent finds needed parts

Now, when a partner service agent needs a spare part, the agent can use the part browser to find where the part is located. The part browser limits the agent to the partner company's inventory locations.

Then, when the partner service agent creates a service order, the partner associates it with the inventory location where this part was found.

Siebel PRM automatically adjusts the quantity of that part in inventory to reflect the fact that parts were used in service orders.

To find a needed part

1 The partner service agent navigates to the Part Browser screen.

2 The partner searches for the part and finds its locations.

Now, the partner can go to the nearest location that has the part in inventory to get it.

Step 5: The brand owner monitors partner inventory level

The brand owner can monitor each partner's inventory for each part by navigating to the Part Browser screen and to All Parts across Organizations view.

The brand owner can monitor each partner's inventory locations by navigating to the Inventory screen and to All Inventory Locations across Organizations view. Then the brand owner can click the Product Inventory view tab and see if the partner is short of inventory by looking at the following fields in the Product Inventory Record:

■ **Safety.** When inventory reaches the amount in this field, the partner should reorder.

■ **Min.** This is the absolute minimum that should be in inventory. The inventory should not reach the amount in this field, because the partner should reorder parts when the inventory reaches the safety level.

The brand owner can set up Siebel Business Process Designer to automatically send the partner a notification telling the partner to reorder a part when the inventory of that part reaches the level in the Safety field. If the inventory of a part reaches the level in the Min field, Siebel Business Process Designer can send a more urgent warning to the partner, or it can send email to one of the brand owner's sales representatives who will contact the partner personally.

The Partner Responds to Service Requests for Assets

In this scenario, the partner uses the Assets screen to work with service requests for assets that customers have purchased. The brand owner can monitor the service requests for each asset.

For more information about working with assets, see *Siebel Field Service Administration Guide*.

This scenario consists of the following steps:

■ **Step 1: The brand owner assigns assets to a partner.**

- ■ **Step 2: The partner logs a service request against the asset.**

- ■ **Step 3: The partner looks at the history of the asset.**

- ■ **Step 4: The brand owner monitors a partner's service of assets.**

Step 1: The brand owner assigns assets to a partner

A partner who services assets must have a list of assets that have been sold to each customer.

If the partner sells and services the product, the partner would create the asset record when they sell the product.

In this example, the brand owner sells products and the partner services them. When a brand owner sells a product, it assigns the asset to a partner company to be serviced.

To assign an asset to a partner company manually

1 Navigate to the Assets screen in the Siebel Partner Manager.

2 In the Assets list, select the asset that you want to assign to the partner company.

3 In the More Info form, click the show more button to expand the form.

4 In the More Info form, in the Organization field, click the Select button.

5 In the Pick Organization dialog box, select the organization of the partner company and click OK.

Step 2: The partner logs a service request against the asset

When a customer calls or comes in to request service on an asset, the partner service agent logs service request against the asset.

The partner creates the service request record in the usual way, and associates it with an asset.

To log a service request against an asset

1 The partner navigates to the Service screen and to My Customer's Service Requests view.

2 The partner creates a new Service Request record and fills out its fields.

a In the More Info form, the partner clicks the show more button.

b In the More Info form, in the Asset field, the partner clicks the select button and chooses the Asset.

Step 3: The partner looks at the history of the asset

To help in responding to the service request, the partner service agent uses the Assets screen to view all past service requests associated with the asset, see when the asset was installed, and look at other features of the asset's history.

To look at the history of the asset

1 The partner navigates to the Assets screen.

2 In the Asset list, the partner selects the record for this asset.

3 The partner views information about the history of the asset in the Asset record and in the Activities, Notes, Service Requests, and Change Requests view tabs.

Step 4: The brand owner monitors a partner's service of assets

At any time, the brand owner can use the Siebel Partner Manager to view all the assets of a partner and to view the service requests associated with these assets, to monitor the partner's service of each asset.

To monitor a partner's service of assets

1 Navigate to the Assets screen.

2 From the Show drop-down list, choose All Assets Across Organizations.

3 If necessary, click the show more button of the More Info form to display the Organization field.

4 Click Query, select the partner organization in the organization field of the query form, and click Go.

All assets for that partner company appear in the Assets list.

5 In the Assets list, select an asset.

6 Click the Service Request view tab.

All service requests for that asset appear.

Managing Partners' Service Requests

Partners often encounter situations in which they need assistance from the brand owner because they have questions about the partnership, requests for marketing collateral, questions about commission payments, or other questions.

Your partners can use the Self-Service screen in the Siebel Partner Portal to log service requests, if they have questions about the partnership, questions about using Siebel PRM software, or any other questions or needs that require personal service.

To reduce the number of service requests you receive, you can create a repository of FAQs, solutions, and SmartScripts to help partners solve their own problems without logging service requests. These will be covered in "Using Solutions and SmartScripts to Help Partners Solve Problems" on page 292.

NOTE: Be sure to tell your partners to use the Self-Service screen of the Siebel Partner Portal to log their own service requests. The Service screen is used to log customer service requests.

Assigning Service Requests

Your company's service requests are listed in the Siebel Partner Manager and other Siebel applications in the All Service Requests view of the Service screen. As they are received, each request should be assigned to the appropriate service agent. After the service agents resolve service requests, they change their status to Closed.

Service requests may be assigned in two ways:

- **Assignment Manager.** You can set up Siebel Assignment Manager to assign service requests to the appropriate service agent at your company using criteria such as expertise, availability, and workload.

- **Manual Assignment.** Service requests logged by the partner are displayed in the All Service Requests view in the Siebel Partner Manager. An employee at the brand owner company with access to this view can assign the service requests manually to the appropriate service agent.

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

For more information about working with service requests, see *Siebel Call Center User Guide*, *Siebel eService Administration Guide*, and *Applications Administration Guide*.

Business Example Using Partner Self-Service

The following example shows how a partner might use a service request to get marketing materials.

One of your partners wants to organize a marketing event such as an executive seminar about partner relationship management. It needs to get appropriate marketing material from you for this event, where it will display both your brand name and its own brand name.

The Partner logs a service request for the marketing materials through the Self-Service screen in the Siebel Partner Portal.

The service request is routed to the appropriate person at the brand owner company by Assignment Manager, or it is assigned manually by the person responsible for assigning service requests at the brand owner company.

The service agent fulfilling the service request follows up by finding the appropriate marketing material and routing it to the partner.

Using Solutions and SmartScripts to Help Partners Solve Problems

You can help partners solve problems by creating solutions or Siebel Troubleshooting or Instruction SmartScripts. Solutions or SmartScripts can help partners solve:

■ **Customer problems.** Partner can use solutions or SmartScripts rather than getting help from the brand owner to solve customer service requests.

■ **Partnership problems.** Partners can use solutions or SmartScripts to solve their own problems, rather than using the Self-Service screen to enter service requests.

Business Example Using Solutions and SmartScripts

The following is an example of how a partner might use solutions and SmartScripts that you have set up.

One of your partners is planning to organize a seminar to educate executives about partner relationship management. The partner wants to know whether the brand owner will refund the cost of this marketing event.

The partner navigates to the Solutions screen in the Siebel Partner Portal, browses the frequently asked questions (FAQs), and searches on keywords to find relevant solutions.

The partner finds an FAQ that says there is a SmartScript with a series of questions and answers that let you identify whether marketing events qualify for reimbursement.

The partner navigates to the Solutions screen in the Siebel Partner Portal and runs this SmartScript. It asks a series of questions about the type of event being organized, the partner company's partnership level, and other parameters that determine whether a marketing event qualifies for reimbursement.

The partner finds that the seminar qualifies for reimbursement. However, the partner still needs some help from the brand owner, such as marketing material and permission to use its logos. To get this help, the partner navigates to the Self-Service screen and logs a service request, as described previously.

Making Solutions Available to Partners

Service solutions are answers to frequently asked questions (FAQs). You can create solutions to be used by your customers, employees, or partners. You can associate a solution with related solutions and resolution documents, so users can navigate among these related documents. A service agent can associate a solution with a service request or a change request to make it available to the user who logged the request.

Solution records may be published internally, externally, or both:

■ Solutions published internally are accessible to your employees.

■ Solution published externally are accessible to customers.

You publish solutions internally to make them available to partners, because Siebel PRM treats partner employees as your employees.

Use access control to make solutions accessible to a specific partner or partner community. Use the Catalog Administration screen to add the solution to a catalog that is associated with the partner community you want to make it visible to.

Your partners access these solutions through the Solutions view of the Solutions screen in the Siebel Partner Portal. Partners can browse through the solutions or use a key-word search to find the solution they need. The Solutions view shows a flat list of solutions, which is useful for a keyword search.

Alternatively, solutions can be added to catalogs and be made available to users through the InfoCenter screen. Navigation of the InfoCenter is more straightforward.

For information on creating and administering service solutions, FAQs, and resolution documents, see the section on solutions and service requests in *Applications Administration Guide.*

Making Troubleshooting or Instruction SmartScripts Available to Partners

A SmartScript is a set of branching questions and instructions. The answer to each question determines which question or instruction appears next.

Siebel SmartScripts are often used by call center agents who perform trouble shooting. The SmartScript tells them what question to ask the customer. Depending on the customer's answer, the SmartScript tells them the next question to ask. The scripted series of questions and answers helps the agent identify and solve the problem.

You can also create SmartScripts to help your customers, employees, or partners to solve problems.

After you have created and tested the SmartScript, you select the Active check box to make it available.

For information about creating and administering SmartScripts, see *Siebel SmartScript Administration Guide*.

To make a Troubleshooting or Instruction SmartScript available to partners

1 Navigate to the Smartscript Administration screen.

2 Create a Smartscript.

   a Select Troubleshooting or Instructions in the Type field.

   b Click the Active check box.

3 Add the Smartscript to the eService Catalog in the desired category.

4 Make sure the partner is in the Access group for that category.

   The SmartScript is visible to the partner in the Solutions screen of the Siebel Partner Portal. The partner can filter to display only Troubleshooting or Instruction SmartScripts.

Managing Marketing 9

This chapter describes scenarios that illustrate different ways that you can use Siebel PRM to manage marketing.

About Managing Marketing

Siebel PRM can be used for three types of marketing:

■ **Collaborative marketing with your partners.** The brand owner can work collaboratively with partners to market your products to customers.

■ **Marketing to your partners.** The brand owner can direct marketing campaigns to your partners to help convince them to resell a new product that you are introducing, to join a specific partner program, or for other reasons.

■ **Marketing by your partners.** Partners can use the Siebel Partner Portal to create and execute their own marketing campaigns.

This chapter describes some scenarios that are examples of ways that you might use Siebel PRM for marketing. Siebel applications include marketing functionality that lets you create marketing offers, campaigns, and programs, that executes campaigns automatically, and that helps you manage responses.

For more information about marketing, see *Siebel Marketing Guide.*

Collaborative Marketing with Partners

You often want to work with your partners collaboratively to market your products to your customers. Use Siebel PRM to:

■ **Plan the collaborative marketing**

■ **Manage the collaborative marketing campaign**

Planning Collaborative Marketing

You can use Siebel PRM's CHAMP planning screen to plan collaborative marketing projects. This screen lets you:

■ Set specific marketing objectives, such as launching a 20% discount offer on a server product line in order to generate a 10% increase in revenue, or jointly hosting a conference about complementary products.

■ Associate a detailed action plan with each objective, scheduling actions that you and your partner must take to meet the objective.

■ Link each objective to a market development fund to indicate the source of funding for the marketing program. Partners will be able to link fund requests to the objectives, so they can receive credit for money spent executing the marketing program.

For example, the brand owner and partner may decide to host an event in order to promote their complementary products or services. They use the CHAMP planning screen to specify an action plan, which they both agree on. Following the action plan, the partner organizes the event. As the partner incurs expenses in organizing the event, it submits market development fund requests to receive credit against the fund.

For more information about CHAMP planning, see Chapter 5, "CHAMP Planning."

For more information about market development funds, see Chapter 12, "Using Market Development Funds."

Managing Collaborative Marketing Campaigns

Campaigns typically involve contacting current or potential customers to market your products. For instance, you might have a campaign to contact people and sign them up for a seminar, or a campaign to send out a promotional mailing that requires that the recipients call in if they are interested in your products or services.

Because campaigns are contact-intensive, they are often handled by a call center. Many Siebel campaign functions are designed to maximize a campaign's effectiveness in a call center environment. Siebel applications let you create campaigns, specify lists and groups of people to call, specify quotas for the call center personnel, and track which employees have the skills needed for different campaigns.

Partner employees have access to call center campaigns through the Siebel Partner Portal in the same way that your employees have access through Siebel Partner Manager. Partners can use the Siebel Partner Portal to update call status and outcome, refresh the contacts list, launch SmartScripts, create campaign leads, and do the other things that your internal employees do when they work with campaigns.

You can also share other kinds of campaigns with partners, such as email, Web, or Direct Mail campaigns. For example, the brand owner could set up an email campaign, allow the partner to edit the contact list, then close the campaign for editing and launch the email campaign. In this case, the brand owner executes the email campaign, but the partner has input as to where the emails get sent.

You create collaborative campaigns and campaigns that your own company executes in the same way. The only difference is that, for collaborative campaigns, you add partner organizations to the campaign, as well as your own employees. Siebel PRM lets your partners use the same functionality that your own company uses to run campaigns.

After associating partner organizations with the campaign, you can use the Execution Options view of the Campaign Administration screen to assign campaign contacts to partners manually or using Siebel Assignment Manager. Partners will only see contacts that have been assigned to them. You can also use this view to specify whether partners can add and edit contacts for the campaign.

As an alternative method of assigning partners to campaigns, you can use the Application Administration screen, Campaign Groups view, to create groups of employees. For example, you can define a team of people within a partner company who regularly execute campaigns as a campaign group. You can assign the groups to campaigns, by using the Campaign Administration screen, Groups view. After you assign the campaign to the partner organization, the partner can also assign these groups to the campaign using the Siebel Partner Portal.

In one typical way of executing a collaborative campaign, the brand owner sets up the campaign and provides a contact list to the partner company, and the partner executes the campaign in its call center. For example, a collaborative campaign might involve the following scenario:

■ Your company and your partner have sponsored an event collaboratively. You want to follow up by giving the attendees a phone offer to buy one of your products at a discounted price.

■ You create the campaign and the offer, using the Siebel Partner Manager's Campaign Administration screen.

■ You add the attendees at the trade show to the campaign's Contacts/Prospects list, using the Siebel Partner Manager's Campaign Administration screen. Alternatively, you import a list attendees using the Siebel list management functionality, which lets you import lists in many standard formats.

■ You add one or more partner organization to the campaign, using the Siebel Partner Manager's Campaign Administration screen. All Partner companies whose organizations have been added will have visibility into the Campaign header using the Campaign Planning screen on the Portal. A marketing manager at the partner company can then add employees at the partner company to the campaign team.

■ Depending on the execution options, campaign contacts will be assigned to the partners associated with the campaign through Assignment Manager or manually. Other options determine whether partner organizations will or will not be able to add, remove or edit campaign contacts.

Collaborative Marketing with Partners

■ The partner company's call center executes the campaign. Partner employees who are on the campaign team can see this campaign in the My Campaigns view of the Siebel Partner Portal's Campaigns screen. They can click the view tabs to display a summary of the campaign, the call guide, the offer, the list of prospects and contacts, and other information.

For more information about creating campaigns, see *Application Administration Guide*.

To add partner organizations to the campaign team

1 Navigate to the Campaign Administration screen.

2 In the Campaigns list, select the campaign that you want the partner to execute.

3 In the Organization field of the campaign, click the Select button and use the dialog box to select partner organizations.

All partner organizations that were added can view information about the campaign through the Campaign Planning screen of the Siebel Partner Portal.

Marketing to Partners

You can market to your partners to recruit more partners into your partner program, recruit existing partners into a new program, inform your partners about a new promotion or a new product launch, invite partners to an event, ask partners to participate with you or sponsor an event, or for other reasons.

Siebel PRM and Siebel Marketing allow your marketing managers to market to partners through a variety of channels, and to market to partners in conjunction with their other marketing activities.

Creating and Executing Campaigns

Campaigns are the key method of marketing to partners or to customers. You create campaigns with specific goals, such as introducing a new product, and offers that are part of each campaign, such as an offer to sell the product at a discount price.

You can use the Campaign Administration screen to create campaigns that are specifically targeted to your partners, create offers and associate them with the campaign, create a prospect list that consists of prospective or existing partners, and send the offers to the prospects through a variety of channels: direct mail, fax, email, web, phone, or newsletter.

For example, if you are launching a new product line and want existing resellers of other product lines to sign up as resellers of this new line, you might go through the following process:

■ **Create a new campaign.** Navigate to the Campaign Administration screen, add a new record, and enter information describing the campaign.

■ **Add contacts to the campaign.** Determine which partners you want to receive the campaign, and add them to the campaign's contact list, or use list management to import a list of prospective partners.

■ **Create an offer for the campaign.** Determine how you want the partners to get the news about this product launch, and navigate to the Offers screen and create an appropriate offer. For example, if you want to contact the partners by email, create an email offer and associate literature (such as a brochure and price list) with the offer. The email can also have a hyperlink to the Siebel Partner Portal, where they can find out more about the new product line and sign up as resellers.

- **Execute the campaign.** The email is sent, and partners will respond if they are interested.

- **Create a follow up campaign.** To follow up the email campaign, you might plan an event for partners to attend if they have signed up as resellers of this product. You could create and execute this follow up campaign as you did the initial campaign, except that the contacts are only the partners who have signed up as resellers and the campaign is a phone campaign, so it is executed by your call center. Creating the follow up campaign requires Siebel Marketing.

For more information about campaigns, see *Siebel Marketing Guide*.

Making Campaign Offers to Partners

When you do collaborative marketing with partners, you generally create phone offers and have the partners execute the phone campaign. When you market to your partners, you can use a variety of offers, including:

- eNewsletters

- eMail Offers

- Direct Mail Offers

- Web Offers

- Fax Offers

- Phone Offers

Offers can be used for marketing and for communicating with partners.

For example, you can create eNewletters that update partners on the latest information about your company, or create eNewsletters that are delivered on a regular schedule. The eNewsletters can have a variety of purposes: you can use them for regular newsletters, news releases, quarterly financial results, special promotions, or for other purposes.

Offers have content that can be personalized for each recipient. The Offers screen lets you create sections for each type of offer and to specify rules that determine which sections the recipient sees.

For information about working with offers, see *Siebel Marketing Guide*.

Marketing by Your Partners

The Campaign Planning screen of the Siebel Partner Portal allows partners to create their own campaigns and execute them independently of the brand owner.

Partners create campaigns as the brand owner does. They use the Campaign Planning screen to create a new Campaign record, and to create the following records that are associated with the campaign:

■ **Lists.** Allows the partner to add external lists of contacts/prospects to the campaign.

■ **Offers.** Allows the partner to specify offers that the campaign will make to customers, including phone, direct mail, email, fax, media, and other types of offers.

■ **Contacts/Prospects.** Allows the partner to add existing Siebel Contacts to the campaign.

■ **Owner Audit Trail.** Allows the partner to track ownership of campaign contacts.

■ **Quotas.** Allows the partner to set targets for the campaign, such as the number of calls per hour.

■ **Responses.** Allows the partner to track responses to the campaign, if it is a campaign with a response type of *Response*.

■ **Team.** Allows the partner to specify the employees working on the campaign.

■ **Groups.** Allows the partner to add predefined lists of employees to the campaign team.

Other partners cannot see a campaign created by a partner company. The brand owner can see all partners' campaigns by navigating the Campaign Administration screen, All Campaigns across Organizations view.

The Campaign Planning screen of the Siebel Partner Portal is similar to the Campaign Administration screen in Siebel Partner Manager, but without a number of views. For more information about how it is used, see *Siebel Marketing Guide*.

NOTE: Siebel Marketing Manager for Partners is an additional product that offers more extensive marketing functionality for partners than Siebel PRM. For more information about this product, see *Siebel Marketing Guide*.

Managing Partner Commerce **10**

This chapter describes how you can use Siebel PRM to manage partner commerce. It looks at ways that you can use partner commerce to sell to partners, and at ways that partners use partner commerce to sell to customers.

About Partner Commerce

Siebel PRM supports the following types of partner commerce:

- **Standard Partner Commerce.** Allows partners to create quotes and orders using a shopping cart, as customers do using Siebel eSales.

- **Power Partner Commerce.** Allows partners to create quotes and orders using the Quotes and Orders screens, as your own employees do using Siebel Partner Manager, Siebel Sales or other Siebel employee applications.

- **Personal Partner Commerce.** Allows partners to buy only on their own account, not on behalf of a customer.

Standard partner commerce is straightforward and can be used by partners with little or no training.

Power partner commerce may require more training and has more capabilities.

Setting Up Partners for Standard, Power, and Personal Commerce

Whether partner employees use standard partner commerce, power partner commerce, or personal partner commerce views depends on their responsibilities and roles:

■ **Responsibility.** Controls which views the partner can use. You assign partners a responsibility that allows them to access the standard partner commerce views or a responsibility that allows them to access the power partner commerce views.

■ **Role.** Controls which options the partner gets in the Quotes home page and the Orders home page. The task applets in these home pages are driven by roles.

To set up a partner employee as a standard partner commerce user

1 Navigate to the User Administration screen.

2 In the Employees list, select the record for the partner.

3 In the More Info form, click the show more button.

4 In the More Info form, in the Responsibility field, click the select button.

5 In the Responsibilities dialog box, click New.

6 In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Standard User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

7 In the More Info form, in the Roles field, click the select button.

8 In the Roles dialog box, click New.

9 In the Add Roles dialog box, select the role named "Partner Commerce Standard User," click OK to add it to the user's roles, and then click OK in the Add Roles dialog box.

To set up a partner employee as a power partner commerce user

1 Navigate to the User Administration screen.

2 In the Employees list, select the record for the partner.

3 In the More Info form, click the show more button.

4 In the More Info form, in the Responsibility field, click the select button.

5 In the Responsibilities dialog box, click New.

6 In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Power User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

7 In the More Info form, in the Roles field, click the select button.

8 In the Roles dialog box, click New.

9 In the Add Roles dialog box, select the role named "Partner Commerce Power User," click OK to add it to the user's roles, and then click OK in the Add Role dialog box.

To set up a partner employee as a personal partner commerce user

1 Navigate to the User Administration screen.

2 In the Employees list, select the record for the partner.

3 In the More Info form, click the show more button.

4 In the More Info form, in the Responsibility field, click the select button.

5 In the Responsibilities dialog box, click New.

6 In the Add Responsibilities dialog box, select the responsibility named "Partner Commerce Personal User," click OK to add it to the user's responsibilities, and then click OK in the Add Responsibilities dialog box.

7 In the More Info form, in the Roles field, click the select button.

8 In the Roles dialog box, click New.

9 In the Add Roles dialog box, select the role named "Partner Commerce Personal User," click OK to add it to the user's roles, and then click OK in the Add Roles dialog box.

Scenarios for Partner Commerce

Your partners may use standard partner commerce to shop in two ways:

■ **Partners shopping for themselves.** The partner is your customer.

■ **Partners shopping for their customers.** The partner is your sales agent, selling your products to customers.

In both of these methods, partners use the eSales catalog to choose products. For more information about setting up and using eSales, see *Siebel eSales Administration Guide*.

Partner commerce can also use Siebel Interactive Selling, which includes eAdvisor, eConfigurator, ePricer, and eAuction. For more information about Siebel Interactive Selling, see *Product Administration Guide*, *Siebel Interactive Designer Administration Guide*, *Pricing Administration Guide*, *Siebel eAuction Guide*, and *Siebel eSales Administration Guide*.

Partners Shopping for Themselves

Partners can place orders for themselves to replenish their store inventory or to order new products that the brand owner has made available to them as product offers.

After shopping, partners use the My Quotes and My Orders views in the Quotes and Orders screens in the Siebel Partner Portal to track the quotes and orders that they created.

Partners shop for themselves in the same way, regardless of whether they use standard partner commerce or power partner commerce.

NOTE: If partners are using personal partner commerce, the system skips the step that asks the partners whether they are shopping for themselves or for customers, because they can only shop for themselves.

To shop for themselves

1 In the Siebel Partner Portal, the partner navigates to the Product Catalog screen.

2 The partner browses the catalog and adds an item to the Shopping Cart.

The New Cart form appears, with the question Who are you shopping for?

3 The Partner clicks My Company.

The shopping cart appears.

4 The partner continues to browse the catalog and add items.

5 While browsing, the partner can click View Details at any time to display the shopping cart.

6 In the shopping cart, the partner can click Check Out to complete the purchase, or the partner can click Save Cart to save the cart as a quote.

7 If the partner has saved the cart as a quote, it can be viewed by navigating to the My Quotes view.

Partners Shopping for Customers

Partners with Standard Partner Commerce have only the easiest to use method of shopping for customers.

Partners with Power Partner Commerce have additional methods of shopping for customers.

Shopping for Customers Using Standard Partner Commerce

Your partners' sales agents may use the Siebel Partner Portal to shop, provide quotes, and place orders for their customers, for example, if the partners are resellers of your products. This is more complicated than shopping for themselves, because resellers could have different price lists for different customers, based on geography, account, or other factors.

After shopping, partners use the My Customer Quotes and My Customer Orders views in the Quotes and Orders screens in the Siebel Partner Portal to track quotes and orders that they created.

To shop for customers using Standard Partner Commerce, the partner uses the shopping cart and product catalog.

This method gives the partner a simple shopping process. It does not allow the partner to specify line item Ship To addresses.

To shop for customers using Standard Partner Commerce

1 In the Siebel Partner Portal, the partner using Standard Partner Commerce navigates to the Product Catalog screen.

2 The partner browses the catalog and adds an item to the Shopping Cart.

The New Cart form appears, with the question Who are you shopping for?

3 The Partner clicks A Customer.

The Customer Information form appears.

4 In the Customer Information form, the partner clicks the Select buttons to select the customer's account, last name, price list, and to link the sale to an opportunity. After selecting the customer's account, the partner can select a price list for that account.

5 In the Customer Information form, the Partner clicks Next.

The Shopping Cart form appears, with the Customer Information form above it.

6 The partner continues to browse the catalog and add items for the customer.

7 When the shopping cart is displayed, the partner can edit the information in the Customer Information form.

8 In the shopping cart, the partner can click Check Out to complete the purchase, or the partner can click Save Cart to save the cart as a quote.

9 If the partner has saved the cart as a quote, it can be viewed by navigating to the My Customer Quotes view in the Quotes Screen.

Shopping for Customers Using Power Partner Commerce

Your partners' sales agents may use the Siebel Partner Portal to shop, provide quotes, and place orders for their customers, for example, if the partners are resellers of your products. This is more complicated than shopping for themselves, because resellers could have different price lists for different customers, based on geography, account, or other factors.

After shopping, partners use the My Customer Quotes and My Customer Orders views in the Quotes and Orders screens in the Siebel Partner Portal to track quotes and orders that they created.

To shop for customers using Power Partner Commerce, the partner can follow any of the following three processes:

■ **Use the Shopping Cart and Product Catalog.**

■ **Use the Quotes Screen and the Product Catalog.**

■ **Use the Quotes Screen without the Product Catalog.**

Using the Shopping Cart and Product Catalog

This is the best option if the partner does not have to specify line item Ship To addresses and if you want a simple shopping process.

When they use this method, partners with Power Partner Commerce shop for customers in the same way as partners with Standard Partner Commerce. For instructions on how this is done, see the section "Shopping for Customers Using Standard Partner Commerce" on page 310.

Using the Quotes Screen and the Product Catalog

This is a good option if you have partners who are experienced users. The Quotes screen provides additional functionality, such as the ability to specify due date, effective date, through date, or different bill to and ship to addresses than the defaults for the account.

This option is only available to Power Partner Commerce users.

To shop using the Quotes screen and the Product Catalog

1 In the Siebel Partner Portal, the partner using Power Partner Commerce navigates to the Quotes screen.

2 In the Quotes form, the partner clicks the My Customer Quotes hyperlink.

3 The partner creates a new quote and enters Quote Header information, such as the account, contact, price list, and so on.

4 In the Quote Header form, the partner clicks Browse Catalog.

5 The partner browses the catalog and adds items to the cart.

6 In the catalog, the partner clicks View Details.

The Quote Detail view appears.

7 The partner reviews and, if necessary, edits line items in the quote.

8 The partner clicks the Orders view tab.

9 The partner clicks Sales Order or Service Order to turn the quote into an order.

Using the Quotes Screen Without the Product Catalog

This is also a good option if you have partners who are experienced users. It provides the same functionality as the previous option. The difference is a matter of preference: some brand owners think the product catalog is easier for partners to understand and work with, so they use the previous method. Other brand owners think that it is faster for partners to make choices from a flat list of products, so they use this method.

This option is only available to Power Partner Commerce users.

To shop using the Quotes screen without the Product Catalog using Standard Partner Commerce

1 In the Siebel Partner Portal, the partner using Power Partner Commerce navigates to the Quotes screen.

2 In the Quotes form, the partner clicks the My Customer Quotes hyperlink.

3 In the Quotes list, the partner clicks New to create a new quote and enters Quote Header information, such as the account, contact, price list, and so on.

4 The partner clicks the Line Items view tab.

5 In the Line Items list, the partner clicks Add Item to add a new line item to the quote.

6 The partner selects a product for the new line item, enters the quantity, discount, and other information.

7 The partner continues to create a new line item for each product being purchased.

8 The partner clicks the Orders view tab.

9 The partner clicks Sales Order or Service Order to turn the quote into an order.

Disabling the Partner Commerce Workflows

When a partner adds an item to a new shopping cart, both standard partner commerce and power partner commerce invoke workflows that ask whether the partner is shopping on behalf of a customer or on their own behalf.

You can turn off this functionality by deleting the following parameter:

```
PostAddToCartLogic = eChannelShoppingScenarios
```

You must delete this parameter in both the Server Administration screen and the Siebel Server.

To disable the message that asks partners who they are shopping for

1 Use any text editor to open the configuration file for the Siebel Partner Portal, which is the file < installation directory > \siebsrvr\bin\ < lang > \scw.cfg.

2 In the [InfraShoppingService] section of the file, delete the following line:

```
PostAddToCartLogic = eChannelShoppingScenarios
```

3 Change this parameter in the Server Administration screen:

    a From the application-level menu, choose View > Site Map > Server Administration > Components.

    b Click the Component Parameters view tab.

    c In the Components list, search for eChannel Object Manager in the Name field.

    d In the Component Parameters list, find the parameter *PostAddToCartLogic* and delete it.

4 Restart your server.

Disabling the Partner Commerce Workflows

Partner-to-Partner Collaboration 11

This chapter describes ways in which your partner companies can use Siebel PRM to collaborate with other partner companies. The brand owner can track the collaboration, but does not have to participate in it.

About Partner-to-Partner Collaboration

Other chapters of this book describe ways in which Siebel PRM allows the brand owner to work with partners.

This chapter describes ways in which Siebel PRM allows partners to work directly with other partners. This chapter covers:

■ **Partner Collaboration.** Provides a powerful way for partners companies to share information with employees or organizations of other partner companies.

■ **Projects.** Provide a simple way for partner employees to share information with employees of other partner companies.

You can also configure visibility using Siebel Tools to allow partners to share information in other ways. For more information, see .

Partner Collaboration

Partner collaboration allows partners to share information with either employees or organizations of other partner companies. It can be used to share information among two or more partner companies.

It also provides partners with an automated process of requesting and accepting collaborations. After using the Partner Locator to find partners it wants to collaborate with, the partner clicks Request Collaboration to send a message to these partners. The invitee partners can view these collaboration requests in the Collaborations screen and can accept or reject them by changing the value of the Status field.

When a request is accepted, a Collaboration record is created. Then partners associate this collaboration with resources, employees or organizations that will work on the collaboration.

It is not necessary for the partner to create a new collaboration whenever there is a need to collaborate on a new opportunity. After the collaboration and resources have been established, the resources can be used on any new opportunities (or on other data) for the duration of the collaboration.

After the collaboration is set up, the partner companies that are collaborating can share Opportunities, Service Requests, Quotes, Orders, Campaigns, Accounts, Contacts, Project, and other information.

We will look at one typical scenario, illustrating how a partner can work on opportunities in collaboration with other partner companies. This scenario consists of the following steps:

■ **Step 1: A partner locates other partners and sends collaboration requests.**

■ **Step 2: An invitee partner accepts the collaboration request.**

■ **Step 3: The initiating partner creates a collaboration.**

■ **Step 4: Both partners add resources to the collaboration.**

■ **Step 5: The partner companies share opportunities.**

■ **Step 6: Partners monitor their collaborations.**

■ **Step 7: The brand owner monitors all collaborations.**

Step 1: A Partner Locates Other Partners and Sends Collaboration Requests

As the first step, the partner who is the initiator of the collaboration uses the Partner Locator and enters criteria to find other partners to collaborate on this project. For example, it might look for other partners in a specific location with a specific expertise.

Once the initiator has located other partners, it clicks Request Collaboration to send them a message asking them to collaborate. Because the initiator does not necessarily know individuals in the partner company they are inviting to collaborate, the message is sent to the organizations of the invitee.

To locate partners and send collaboration requests

1 The initiator partner navigates to the Partner Locator screen.

2 In the Partner Locator, the partner enters criteria to identify other partner companies for this collaboration and clicks Search.

The Partner Locations list appears, listing all partners that match the criteria.

3 In the leftmost column of the Partner Locations list, the initiator partner selects the check box for all the partner organizations in the list who will be invited to collaborate.

The initiator partner checks the Available for Collaboration column of the partner locator to see whether a partner organization can be involved in a collaboration.

4 The partner clicks Request Collaboration.

The Outbound Request form appears.

5 The partner fills out the Outbound Request form with the following information and clicks Send Request.

Field	Comment
Initiating Organization	Displays the organization that is initiating the collaboration.
Recipient Organizations	Displays the partner companies being invited to participate in the collaboration. This list includes the partner companies that were chosen in the partner locator. The partner can also click the select button and use the Collaboration Organizations dialog box to add or remove partners from the recipient list for the request.
Description	Enter a description of the collaboration, which should give other partners enough information to decide whether they want to join the collaboration.
Type	Select the type of collaboration. Types include Opportunity and Project.
Request Date	Enter the date of the request. The default is the date created.
Expiration Date	Enter the date the request will be made inactive. If the recipients do not respond by this date the request will be removed from the recipients' inbox.
Name	Enter a name for the collaboration request.
Created By	Displays the login of the creator of the request.
Created Date	Displays the date the request was created.
Available to Recipients	When you click Send, the Available to Recipients check box is automatically checked to indicate that the message has been sent. If you click Save without selecting Available to Recipients, then the message will not will available to the recipient partners.

Step 2: An Invitee Partner Accepts the Collaboration Request

The collaboration request will be in the Inbound Request list of each invitee partner. The partner can accept or reject the request by changing the value in its Status field. The default status of a new request is Pending. The partner changes this value to Accepted or Rejected.

The inviting partner checks the Status field of the request in the Outbound Requests view in order to see if the request was rejected or accepted.

To accept or reject a collaboration request

1 The invitee partner navigates to the Partner Collaboration screen.

2 From the Show drop-down list, the partner chooses Inbound Collaboration requests.

3 In the Inbound Request list, the partner selects a new request.

4 The partner clicks the Request Status view tab.

5 In the Request Status form, in the Status field, the partner chooses Accepted or Rejected.

Step 3: The Initiating Partner Creates a Collaboration

After invitee partners accept the collaboration, the initiating partner creates the collaboration. When the initiating partner clicks the Create button, the collaboration is created and all the invitees who have accepted the collaboration are copied as participants of the collaboration.

To create a collaboration

1 The initiating partner navigates to the Partner Collaboration screen.

2 From the Show drop-down list, the partner chooses Outbound Collaboration requests.

3 In the Outbound Request list, the partner selects the request that has been accepted and will become a collaboration.

4 The partner clicks Create Collaboration.

   A Collaboration record is created based on the request, and all the invitee partners who accepted the request are copied as participants of the collaboration.

5 The partner fills out the other fields in the Collaboration form.

Step 4: Both Partners Add Resources to the Collaboration

When an invitee partner has accepted the collaboration request, a collaboration record is created. The next step is for both the initiator partner and the invitee partner to add resources to the collaboration.

Resources may be the positions of employees in the partner's company or organizations in the partner's company. Each partner in the collaboration adds positions and organizations in its own company.

To add resources to the collaboration

1 Both the initiator and the invitee partners navigate to the Partner Collaboration screen.

2 In the Collaborations list, the partner selects a collaboration.

3 The partner clicks the Resources view tab.

4 In the Resources list, the partner clicks New and selects resources, displaying the following information in the fields of the new record.

Field	Comment
Primary	Select a resource from this picklist.
Resource Name	The name of the resource, entered automatically when you select the resource using the Primary picklist.
User ID	If the resource is a position, the employee's login id is entered automatically when you select the resource using the Primary picklist.
Organization	If the resource is an organization, the organization is entered automatically when you select the resource using the Primary picklist.
Type	The type of the resource, position or organization, entered automatically when you select the resource using the Primary picklist.
Description	The description of the resource, entered automatically when you select the resource using the Primary picklist.
Start Date	The date when the resource becomes available, entered automatically when you select the resource using the Primary picklist.
End Date	The date when the resource will no longer be available, if one exists, entered automatically when you select the resource using the Primary picklist.

Step 5: The Partner Companies Share Opportunities

After the collaboration is set up, the partner companies that are collaborating can share Opportunities, Service Requests, Quotes, Orders, Campaigns, Accounts, Contacts, Project, and other information.

For example, when a partner company in the collaboration works on an opportunity, it can share the opportunity and associated information with the other partner company, assigning the opportunity to any employee or organization in the other partner company that is a resource in the collaboration.

To share an opportunity with another partner company

1 The partner navigates to the Opportunities screen.

2 The partner creates a new opportunity or selects an existing opportunity.

3 In the More Info form, the partner clicks Collaboration Resources.

The Grant Access to Collaboration Dialog Box appears, listing all positions and organizations in other partner companies that this partner employee has a relationship with.

4 In the dialog box, the partner selects resources and clicks OK.

Partner positions that were selected are added to the sales team for the opportunity and can see it in My Opportunities view. Partner organizations that were selected are added to the organization team for the opportunity and can see it in All Opportunities view.

Step 6: Partners Monitor their Collaborations

At any time, a partner company can get an overview of all its collaborations.

To monitor its collaborations

1 The partner navigates to the Company Profile screen:

    a The partner clicks the Profile link at the top of the screen.

    b In the Show drop-down list, the partner selects Company Profile.

2 The partner clicks the Collaborations view tab.

A list of all the partner company's collaborations appears.

3 In the Collaboration list, the partner selects a collaboration.

All of the resources for this collaboration are displayed in the Resources list, which is below the Collaboration list.

Step 7: The Brand Owner Monitors All Collaborations

Throughout the process, the brand owner can view all collaborations that partners have created, to monitor partner collaborations.

The brand owner can also view the opportunities, service requests, and other information being shared in the collaboration by using the appropriate view, such as All Opportunities Across Organizations view.

To monitor all partner collaborations

1 Navigate to the Partner screen.

2 Select the record of a partner company whose collaborations you want to view.

3 Click the Collaborations view tab.

A list of all the partner company's collaborations appears.

4 In the Collaboration list, select a collaboration.

All of the resources for this collaboration are displayed in the Resources list, which is below the Collaboration list.

Siebel Projects

Siebel Projects is a virtual work space that allows direct partner-to-partner collaboration among employees of different partner companies. Partners can use it to work together on software deployment, installation of equipment, sales opportunities that require involvement of multiple partners, and many other types of projects.

All partner employees who are part of the project can view information associated with the project, so employees of different partner companies can use the project to share information and work together.

The brand owner also has visibility across all projects that the partners are working on. Brand owners can monitor the status of the project based on project time lines, project budget, and key risk areas.

For more information about Siebel Projects, see *Siebel Professional Services Automation Guide*.

We will look at a typical scenario, illustrating how a partner that specializes in deploying software applications uses Siebel Projects to work with a partner that specializes in hardware. Because these partners are part of the same project, they can share information and work collaboratively on the project.

- **Step 1. The partner creates a new project.**

- **Step 2. The partner locates other partners and adds them to this project.**

- **Step 3. Partners who are part of the project add their employees the project team.**

- **Step 4. The partner companies work together on the project.**

- **Step 5. The brand owner tracks the partners's work on the project.**

Step 1. The Partner Creates a New Project

In the example used in this scenario, a partner company that specializes in implementation has won a contract to deploy the brand owner's software. This partner uses the Siebel Partner Portal to create a project, which it can use to work with the brand owners and with other partners.

To create a project

1 In the Siebel Partner Portal, the partner navigates to the Projects screen.

2 In the Projects list, the partner clicks New.

3 The partner confirms that its own organization has been added to the project, by making sure that it is listed in the Organization field of the new project record.

4 In the new project record, the partner fills out the fields with information about the project, such as project description, time lines, budget, and key contacts.

Step 2. The Partner Locates Other Partners and Adds Them to this Project

The partner company that created the project realizes that it will need the help of a partner that specializes in hardware to work on this project.

The partner can locate appropriate partners and add them to the project in two different ways:

■ Use the Partner Locator to find partners with relevant skills, and create a collaboration with those partners, as described in "Partner Collaboration" on page 319.

■ Use the Partner Locator to find partners with relevant skills, and have the brand owner add them to the project team.

When they use the Partner Locator, partners can find appropriate companies by searching based on expertise, location, and other criteria. In this case, the partner would enter a criterion such as Partner Type = Hardware.

After they have found the appropriate partner to work with, they can initiate a collaboration, and assuming the hardware partner accepts the collaboration, they can add the hardware partner to the project team.

Alternatively, they can request the brand owner to add the hardware partner to the project team using the All Projects Across Organizations view in Siebel Partner Manager.

To use the Partner Locator

1 In the Siebel Partner Portal, the partner navigates to the Partner Locator screen.

2 The partner enters the appropriate search criteria, and clicks Search.

A list of partners who match the criteria appears.

Step 3. Partners Add Their Employees to the Project

Once the partner companies that need to be involved in a project have been added to the project, each partner company can add its own employees as users of the project. These users form the virtual project team.

NOTE: All partner companies in the project must add their own employees to the project, to allow those employees to access information about the project.

To add partner employees to the project

1 In the Siebel Partner Portal, the partner navigates to the Projects screen.

2 The partner selects the project.

3 The partner clicks the Access view tab.

4 In the Access list, the partner clicks adds a new records for each of each employee of that partner company who will work on the project.

Step 4. The Partners Work Together on the Project

All of the partner employees who have been added to the project can use the Siebel Partner Portal to view information about the project, such as the project summary, and to add information to the project, such as activities, contacts, invoices, notes, risks, service requests, status reports, tasks, and other information.

Any partner employee who is on the project can see the information that the other partners have added.

To add or view information about the project

1 In the Siebel Partner Portal, the partner navigates to the Projects screen.

2 The partner selects the project.

3 The partner clicks the appropriate view tabs to add or view information about the project.

Step 5. The Brand Owner Tracks the Partners' Work

The brand owner can view the project to track its progress, even though the project was set up by partners independent of the brand owner.

The brand owner can view all projects, even if it has not explicitly been made a member.

To track the partners' work on the project

1 In the Siebel Partner Manager, the brand owner navigates to the Projects screen.

2 From the Show drop-down list, the brand owner selects All Projects Across Organizations.

3 In the Projects list, the brand owner selects the project.

4 The brand owner clicks the appropriate view tabs to view information about the project.

Using Market Development Funds **12**

This chapter describes how you can use Siebel PRM to manager market development funds. You can administer these funds using the Siebel Partner Manager, and partners can apply for funds using the Siebel Partner Portal.

About Market Development Funds

A market development fund (MDF) makes it possible to do joint marketing activities with one or more partners. For example, you might create an MDF to fund a joint advertising campaign with one of your large partners. Or you might create an MDF to send several of your partners to a large trade show.

To work with an MDF, you go through the following stages:

- **You create the fund.** When you create a fund, you specify how much funding it has and which partners participate in it.

- **You authorize employees to approve fund requests.** You must authorize your employees to approve fund requests. Employees have a fund request approval limit. If a request is greater than an employee's limit, that employee will route it to other employees for further review.

- **You or your partners request funding.** After a fund has been created, people from the partner company or from the brand owner company can request funding on behalf of partners who participate in the fund.

- **You approve funding requests.** Your company must approve or reject funding requests. Optionally, you can use Siebel Business Process Designer to inform people by email when they must review a request or provide more information.

- **You track the spending.** The MDF checkbook lets you track the amount of credits, debits, and total funds available in the a fund.

Creating a Market Development Fund

Market development funds (MDFs) are created for a variety of reasons. For example, an alliance partner may agree to a fixed MDF as part of its alliance agreement, or you can do joint marketing with a partner and create an accrual MDF to which you will contribute one percent of the partner's sales.

When you create a new MDF, you must specify which partners are participants in the fund and you must specify the fund type.

There are three types of MDFs:

■ **Fixed Fund.** A fund that has a specific amount of money allocated to it.

■ **Accrual Fund.** A fund that has money allocated to it based on the partner's performance. For example, partners can accrue funds based on the number of units sold of a specific product or product line, based on a percentage of their revenues, or based on other metrics you define.

■ **Mixed Fund.** A fund that has both a fixed and an accrual element. It begins with a specific amount of money, and it also accrues additional money depending on partner performance.

You must specify the fund type when you create the Fund record. Then, the funding that you add to the fund depends on the fund type that you specified.

To create a new MDF, you go through the following stages:

■ **Create a new Fund record.**

■ **Add participants to the market development fund.**

■ **Add funding to the market development fund.**

Creating a New Fund Record

The first step in creating a new MDF is to add a new Fund record.

To create a new Fund record

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, click New to add a new record to this list.

3 Enter information about the new fund in the new record and the More Info form, as shown in Table 3.

Table 3.   Fund Administration Fields

Field	Comment
Name	Enter a name for the fund (up to 50 characters) for your own use.
Type	Choose Fixed, Accrual, or Mixed to indicate how funding is allocated, as described in "Creating a Market Development Fund" on page 333.
Fund ID	A unique identifier. Generated automatically.
Active	Indicates whether the fund is currently active, that is, whether partners can make fund requests against this fund. Generated automatically based on the start date and end date.
Locked	Lets you lock the fund record so no one can update it.
Period	Optionally, use the Pick Period dialog box to choose a predefined period from a picklist defined by the Siebel administrator, such as 2001 or Jan. 2001. If you do this, the Start Date and End Date fields are filled automatically.
Start	The date when a partner can begin applying for money from this fund.
End	The last date when a partner can apply for money from this fund.
Target Amount	The amount of money targeted to be accrued to a fund. For a fixed fund, the amount of money agreed to in a fund.
Description	A text description of the fund for your own use. Enter up to 150 characters.
Total Credits	The total of all deposits into the fund. Read-only field calculated by the system.

Table 3.   Fund Administration Fields

Field	Comment
Total Debits	The total of all the approved withdrawals from the fund (actual amounts granted to partners). Read-only field calculated by the system.
Fund Balance	The balance in the fund, calculated as Total Credits minus Total Debits. Read-only field calculated by the system.
Fixed Credits	Credits from fixed deposits into the fund.
Accrual Credits	Credits from accruals to the fund.

Adding Partner Companies as Fund Participants

The second step in creating a new MDF is to add the partner companies who are fund participants to the fund. Partners must be added to the Fund Participation list because only fund participants (and employees at the brand owner company acting on their behalf) are authorized to spend against a fund.

Sometimes, partners contribute to MDFs for joint marketing activities with the brand owner. In these cases, the partner is usually the only participant in the fund.

Similarly, because accruals are used as incentive programs for partners, you generally have only one partner per accrual fund. If you added multiple partners, one partner would accrue funds and the other partners could spend the funds accrued by the first partner.

To add a partner company to an MDF

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, select the fund to which you want to add the partner company.

3 Click the Fund Participation view tab.

The Fund Participation view appears.

4 In the Fund Participation list, click the menu button, then click New Record to add a new record to this list.

5 Enter information in the new record's fields about the partner company's participation.

Field	Comment
Partner	In the Pick Channel Partner dialog box, choose the participating partner company.
Target Amount	Enter the target amount for this partner to receive from all its fund requests to this fund.
Period	Optionally, use the Pick Period dialog box to choose a predefined period, such as 2001 or Jan. 2001. When you do this, the Start Date and End Date fields are filled automatically.
Start	Enter the date when this partner can begin applying for money from this fund. The default value is the start date of the fund.
End	Enter the last date when this partner can apply for money from this fund. The default value is the end date of the fund.
Description	Optionally, enter a description (up to 150 characters) of this partner company's participation in this fund for your own use.

Adding Funding to the Market Development Fund

The third step in creating an MDF is to add funding to it. The type of funding you add depends on the choice you made in the Type field when you created the Fund record:

- **Fixed.** If the fund type is Fixed, add the funding amount in the Fixed Fund Administration view.

- **Accrual.** If the fund type is Accrual, add the funding amount in the Accrual Fund Administration view.

- **Mixed.** If the fund type is mixed, use both the Fixed Fund Administration view and the Accrual Fund Administration view to specify the amount of funding it has. The mixed fund contains the sum of the fixed and accrual funding that you specify.

To add fixed funding to an MDF

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, select a Fund that is Fixed or Mixed.

3 Click the Fixed Fund Administration view tab.

The Fixed Fund Administration view appears.

4 In the Fixed Fund Administration list, click the menu button, then click New Record to add a new record to this list.

5 Enter information about the fixed funding in the new record.

Field	Comment
Name	A name for this funding for your own use, such as Initial Funding or Q2 Added Funding.
Amount	The amount of funding allocated to this fund for this transaction.
Period	Optionally, use the Pick Period dialog box to choose a predefined period, such as 2001 or Jan. 2001. When you do this, the Start Date and End Date fields are filled automatically.
Start	The date when partners can begin spending this funding. If this record is the initial allocation of money to this fund, then this date should be the same as the start date for the fund. If this record is a supplementary allocation, it could be a different date. For example, if you have a yearly fund and you allocate extra funding for the third quarter, the start date for the extra funding could be the first day of the third quarter.
End	The last date when partners can spend this funding.

To add accrual funding to an MDF

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, select a Fund that is either an Accrual or a Mixed type.

3 Click the Accrual Fund Administration view tab.

4 In the Partners list, select the partner company that will accrue funding, or click New to add a new partner company to the list.

5 In the Accrual Definition list, click the menu button, then click New Record.

6 Enter information about the accrual definition in the new record, as shown in Table 4.

Table 4. Accrual Definition Fields

Field	Comment
Type	Select the type of component on which the accrual is based. The default options are Orders (accrued funding based on all the orders of the partner), Product Line (accrued funding based on the orders of the partner for a specific product line), and Product (accrued funding based on the orders of the partner for a specific product). Other options may have been added.
Product Line	If you choose Product Line in the Type field, in this field's dialog box, choose the product line on which accrued funding is based. If you do not choose Product Line as the type, this field is disabled.
Product	If you choose Product in the Type field, in this field's dialog box, choose the product on which accrued funding is based. If you do not choose Product as the type, this field is disabled.
Period	Optionally, use the picklist to choose a predefined period, such as 2001 or Jan. 2001. When you do this, the Start Date and End Date fields are filled automatically.
Start	The date when funding begins to accrue to this fund.
End	The last date when funding accrues to this fund.
Base	This field lets you tier funding by specifying the base amount at which the accrual begins. For example, if you want to give the partner accrual funding only after it sells $1,000,000, you can set the base at $1,000,000. Or if you want to give the partner 1% of the first $1,000,000 it sells, and 2% of everything above that, you can create one fund record with a base of $0 and a rate of 1% and a second fund record with a base of $1,000,000 and a rate of 1%. The second fund record would give an additional 1% beyond the 1% in the first fund record.

Table 4.   Accrual Definition Fields

Field	Comment
U/M	Select the unit of measurement on which the funding is based. For example, if you choose Pallet, Bag, or Dollar, the partner accrues the amount in the accrual rate field for each pallet, bag, or dollar of your product ordered. The units available here can be determined in the LOV administration view under UNIT_OF_MEASURE.
Accrual Rate	Enter an amount of funding that accrues per unit sold.
Estimated Volume	Enter your goal, the volume of sales targeted for this accrual.
Actual Volume	Enter the actual volume of sales for this accrual.

NOTE: When you add an Accrual Definition record, the options available in the Type field can be defined in the List of Value view of the Applications Administration screen by adding values of type ACCRUAL_SRC_TYPE, and the options available in the U/M field can be defined by adding values of type UNIT_OF_MEASURE. For more information about list of value administration, see *Application Administration Guide*.

Setting Up Fund Approval Authorization

Before your company can work with any MDFs, you must authorize the appropriate employees to approve fund requests.

Optionally, you can also change the partner manager field. The partner manager is the initial reviewer of the fund request, so specifying the partner manager field for a partner company determines how new fund requests from that company are routed.

Authorizing Employees to Approve Fund Requests

To authorize employees to approve fund requests, you specify the maximum amount of a fund request that each employee may approve.

Employees may get fund requests to review that are greater than the amount that they can approve. After reviewing those fund requests, they can route them to other employees in your company for approval.

For example, your channel manager for this company may be authorized to approve requests up to $10,000. If a partner submits a request for $5,000 and the channel manager approves it, then the approval process is finished. The request does not need any further approval.

However, if a partner submits a request for $50,000, it is still reviewed by the channel manager initially. The channel manager can either deny or route it to his or her manager for approval. Managers continue to have the option of denying the request or routing it to their managers, until it reaches a manager who is authorized to approve the amount.

To route the request to the next employee in the approval process, select that employee's name in the Processed By field of the fund request record. The employee in this field is the only employee who can change the value of the record.

When you select an employee's name in the Processed By field, Siebel PRM automatically routes the fund request record to that employee, and it appears in that employee's My Funds Request view.

To authorize your employees to approve fund requests

1 Navigate to the User Administration screen.

2 From the Show drop-down list, choose Employees.

3 Select the record of the employee you want to authorize to approve fund requests.

4 In the More Info view, click the More/Less button to display the extended version of the form, and enter the approval amount for that employee in the Fund Approval Limit field.

Changing the Partner Manager Field

Optionally, you can change the partner manager field to change the routing of fund requests for approval.

The initial reviewer for a fund request logged by a partner is the employee selected in the partner manager field for that partner organization. This employee's name is automatically entered in the Processed By field of the fund request. This is the only use of the Partner Manager field, and you can change the initial reviewer of fund requests by selecting a different employee in this field.

To change the partner manager

1 Navigate to the Partner Administration screen.

2 From the Show drop-down list, choose Registered Partners.

3 In the Partner list, select the partner company for which you want to set the Partner Manager field.

4 In the More Info form, click the More/Less button to display the extended version of the form.

5 Click the select button for the Partner Manager field.

The Pick Position dialog box appears.

6 Select the person you want as the partner manger, and click OK.

Initiating a Fund Request

A Fund Request can be submitted either by a partner who enters it using the Siebel Partner Portal, or by an employee at your company who enters it using the Siebel Partner Manager. For example, it may be submitted by an employee in your company's marketing department who plans a marketing campaign involving MDFs.

Siebel Business Process Designer can be set up so that, when the request is initiated, the first employee who must approve it receives email notifying the employee that the fund request has been submitted for approval.

For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide.*

To initiate a Fund request

1 Navigate to the Fund Requests screen.

2 In the Fund Requests list, click the menu button, then click New Record to add a new record to this list.

3 Enter information in the new record's fields shown in Table 5.

Table 5.   New Record Fields

Field	Comment
Name	Enter a name for the request (up to 50 characters) for your own use.
Partner	In the Pick Channel Partner dialog box, choose the partner to which the request applies.
Fund	In the Pick Fund dialog box, choose the fund from which the money comes.
Tracking #	This field contains a unique number generated automatically, which you can use to track the request.
Campaign	Optionally, use the Pick Campaign dialog box to choose your company's marketing campaign for which this fund is being used.
Region	Optionally, choose a region (for example, Africa or North America) where the funding will be spent.
Vertical	Optionally, choose an industry (for example, Automotive or Insurance) on which this funding will be spent.

Table 5.   New Record Fields

Field	Comment
Category	Optionally, choose a category (for example, Advertising or Customer Event) on which this funding will be spent.
Processed By	This field displays the name of the manager who is currently reviewing this request. When you enter a new request, the value in the field defaults to the Partner Manager for this partner organization, who is normally the first manager to review the request. To transmit the request to the next manager in the approval process, use the Pick Position dialog box to choose that manager's name. Only the employee whose name appears in this field can change the record (for example, to change the status to Approved or to Need More Information, or to route the record to the next person for approval).
Due	Enter the date when the funds are needed.
Status	In a new request, the status is New. During the approval process, the status of the fund request changes.
Owned By	This field holds the name of the person who initiated the fund request.
Amount Requested	Enter the amount of the request.
Amount Approved	During the approval process, approvers will enter the approved amount in this field. They may approve the requested funding or a smaller amount. This field cannot be edited in a new request.
Actual Amount	This field displays the actual amount that has been debited to this fund request. This field cannot be edited in a new request.
Approval Log	Keeps track of the modifications to the fund request. Every time a user changes the status of the request or changes the amount approved, another record is added to the approval log.

Working with Fund Requests

While you are working with a fund request, you may find it useful to add attachments, activities, or activity plans to the request.

Adding Attachments to Fund Requests

You can attach supporting documents to Fund requests. For example, if you write a report that describes in detail how the partner plans to use the funding, you can attach it to the Fund Request record. Or if the request is to fund a booth at a trade show, you can attach a brochure from the trade show using any convenient file format, such as an Acrobat file. Employees who review and approve the request can view these attached documents. Attach files to MDF Request records in the Fund Request Attachments view.

NOTE: The partner to which an MDF request applies can view attachments to the request and can also add attachments to the request for the brand owner company to view.

To enter fund request attachments

1 Navigate to the Fund Requests screen.

2 In the list of fund requests, select the request to which you want to add the Attachment.

3 Click the Fund Request Attachments view tab.

The Fund Request Attachments view appears.

4 In the Fund Request Attachments list, click the menu button, then click New Record to add a new record to this list.

5 In the Attachment Name field, click the select button.

The Add Attachment dialog box appears.

6 In the Add Attachment dialog box, click Browse, navigate to the file you want to attach to the record, and click Open.

The name of the file appears in the File Name field of the Add Attachments dialog box.

7 Click Add.

Adding Activities to Fund Requests

You can record a variety of activities that you should perform as part of a Fund request, such as a meeting you must schedule with a partner to discuss the fund request. You can do this by attaching activities to the fund request.

For more information about working with activities, see the chapter on activities in *Siebel Call Center User Guide* or *Siebel Sales User Guide*.

To add an activity for a fund request

1 Navigate to the Fund Requests screen.

2 In the list of fund requests, select the request to which you want to add the Activity.

3 Click the Fund Request Activities view tab.

The Fund Request Activities view appears.

4 In the Fund Request Activities list, click the menu button, then click New Record to add a new record to this list.

5 Fill in the fields with the details of the new activity.

Adding Activity Plans to Fund Requests

If you have a regular series of activities that you perform when you submit a type of Fund request, such as a request for funding for a trade show, you can save time by using an activity plan. Activity plan templates define lists of activities that are often performed in sequence. If your company's Siebel applications administrator has created appropriate templates, you can use a template to attach an activity plan to a fund request.

For information about creating activity plans, see the section on creating activity templates in *Application Administration Guide*.

To enter an MDF request activity plan

1 Navigate to the Fund Requests screen.

2 In the list of marketing fund requests, select the request to which you want to add the activity plan.

3 Click the Fund Request Activity Plans view tab.

The Fund Request Activity Plans view appears.

4 In the Fund Request Activity Plans list, click the menu button, then click New Record list to add a new record to this list.

5 Use the Template field picklist to choose an existing template.

The activities from that template are listed in the Activities list.

Reviewing a Fund Request

After a fund request has been submitted, it must be routed in sequence to the employees who must review it. If the initial reviewer is authorized to approve the full amount in the request, only this approval is needed. However, if the request is larger than the initial reviewer can approve, the reviewer can either reject it or route it to another employee in the brand owner company for further review. If that employee is not authorized to review the entire amount, that employee can either reject it or route it to another reviewer.

To route the request for further review and approval, an approver selects Pending Approval in the Status field of the fund request and then selects that person's name in the Processed By field of the fund request. The Fund Request appears in the My Fund Requests view for that person. Only the reviewer whose name is in the Processed By field can modify the fund request record.

Rather than routing the request for further approval, approvers can also use the picklist in the Status field of the request to choose:

■ **Need More Information.** The approver needs more information to make the decision.

■ **Rejected.** The approver rejects the fund request, and the request fails.

■ **Approved.** The approver gives final approval to the fund request. This option is only available to an employee who is authorized to approve the full amount of the request.

When the status of a fund request is new, rejected or need more information, all fields are editable.

When you change the status to another status, all fields become read only, except for the Status, Comment and Processed By fields.

After you change the status to approved, processed, fulfilled, or submitted for fulfillment, all fields become read only, except for the Due Date, Amount Approved, and Actual Amount fields.

The possible values for the status of a fund request are shown in Table 6.

Table 6.   Fund Request Status Values

Value	Comment
New	The request has been submitted but has not yet been viewed by the initial approver.
Pending Approval	The request has been viewed by the initial approver.
Pending Approval 2	The request has been routed to a subsequent approver.
Pending Review	The request has been routed to the final approver. The final approver is called the reviewer.
Need More Information	One of the approvers has requested more information.
Rejected	The request has failed because an approver has rejected it.
Approved	The request has the required approvals.
Submitted for Fulfillment	The request has been submitted to the payments administrator for fulfillment.
Processed	The request has been processed by the payments administrator.
Fulfilled	The request has been fulfilled by the payments administrator. Funding has been sent to the partner.

Before you approve a fund request, you should look at the fund's checkbook to see the balance in that fund. Make sure the request is not larger than the remaining balance in the fund.

NOTE: The balance in the checkbook is debited only after the Actual Amount field for a fund request is filled out. If you have approved a request and entered the approved amount, it will not necessarily be reflected in the checkbook. It will be visible only after you enter the actual amount.

To view the balance in an MDF

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, select the fund whose balance you want to view.

3 For an accrual or mixed fund, click the Accrual Fund Checkbook view tab.

The Accrual Fund Checkbook view appears.

4 Click the Calculate Total button to update the total.

The accrual balance in the fund appears in the Fund Balance field.

5 For a fixed or mixed fund, click the Fixed Fund Checkbook view tab.

The Fixed Fund Checkbook view appears.

6 Click Calculate Total to update the total.

The fixed balance in the fund appears in the Balance field.

To review a fund request

1 Navigate to the Fund Requests screen.

2 To reject the request, give final approval to the request, or ask for more information, in the Status field picklist of the request you are reviewing, choose a value.

The picklist will give you the option of approving the request only if its amount is less than the amount in the Fund Approval Limit field of your Employee record.

3 To route the request to another employee for further review and approval:

a Change the status to Pending Approval.

b Click the select button to the right of the Processed By field to display the Pick Position dialog box.

c Select that employee's record, and click OK.

Viewing Fund Requests for a Partner Company

You can review a partner's performance periodically or can view how many other fund requests from a partner are open before approving the current request. The Partner Fund view lets you look at a single list of the partner's fund requests, regardless of which MDF is involved.

To view a partner's fund requests

1 Navigate to the Partners screen.

2 In the Partners list, select the partner whose requests you want to display.

3 Click the MDF Requests view tab.

The MDF Requests list with that partner's fund requests from any MDF appears.

Viewing the Status of a Fund Request

You can use the Siebel Partner Manager to check the status of a fund request after it has been submitted, and your partners can use the Siebel Partner Portal to view this information. For example, a partner who submitted a fund request can make sure that the approval process has started at the brand owner company, or employees who need to start work when the funding is available will want to see if it is approved.

A fund request can have the status values shown in Table 6 on page 348.

To view the status of a fund request

1 Navigate to the Fund Requests screen.

2 In the Fund Requests list, select the request whose status you want to check.

The status appears in the Status field of the form at the bottom of the screen.

Viewing a Fund's Checkbook

You can use an MDF's Accrual Fund Checkbook view and Fixed Fund Checkbook view to display the balance remaining in the fund, as well as to display the details of how much of this balance comes from fixed funding, how much comes from accrued funding, and what funding requests have been debited against the fund.

The debits against the fund are shown in both the accrual fund checkbook and in the fixed fund checkbook.

NOTE: The balance in the checkbook is debited only after the Actual Amount field for a fund request is filled out. If you have approved a request and entered the approved amount, it will not be reflected in the checkbook. It will be visible only after you enter the actual amount.

To view an MDF's checkbook

1 Navigate to the Fund Design screen.

2 In the Fund Administration list, select the fund whose balance you want to view.

3 If it is an accrual or mixed fund, click the Accrual Fund Checkbook view tab.

 The Accrual Fund Checkbook view appears.

4 Click Calculate Total to view the balance.

5 In the MDF Accrual Credits applet, review the credits that have accrued to this fund. In the MDF Debits list, review the debits for this fund.

6 If it is a fixed or mixed fund, click the Fixed Fund Checkbook view tab.

 The Fixed Fund Checkbook view appears.

7 Click Calculate Total to view the balance.

8 In the Fixed Credits list, review the credits for this fund. In the MDF Debits list, review the debits for this fund.

Managing Your Partners 13

The other chapters of this book focus on how to share information with your partner. This chapter focuses on tools you would use to track information about your partners, to train your partners, and to communicate with your partners.

As part of your relationship with partners, you can use Siebel PRM to train partner employees, certify partner companies, plan partner management activities, measure performance of partners, and keep other records about your partners.

The last part of the chapter focuses on using Siebel PRM to communicate with your partners or prospective partners.

Tracking Partner Information

The partner profile and partnership profile are key ways of tracking partner information.

You can also use the Partner screen to keep track of partner management activities, partner agreements, partner company attachments, partnership contacts, and partner notes, and to create a partner company organization chart.

Using the Partner and Partnership Profile

Siebel PRM lets you work with two profiles:

- **Partner Profile.** A partner profile includes information about the partner or prospective partner company's business.

- **Partnership Profile.** A partnership profile includes information about your company's relationship with the partner company.

Entering or Viewing a Partner Company Profile

You can use the partner profile screen to enter information about the partner company for your own use, such as its annual revenues, its number of employees, its sales revenues, and so on.

If this company applied to be a partner through your Siebel Partner Portal Web site, it filled out a partner profile form. You can use the Partner Profile screen to view the information that it entered.

To enter or view a partner company profile

1 Navigate to the Partners screen.

2 In the Partners list, select the partner whose profile you want to display.

3 Click the Profile view tab.

4 If the Partner Profile is not already displayed, select Partner Profile in the drop-down list in Profile view.

5 Enter or view information about the Partner Company in the Partner Profile form.

Field	Comment
Description of Business	A short description of the partner company's business and background.
Annual Revenue	The partner company's annual revenues.
Markets	The market segments in which the partner operates.
# of Employees	The Number of employees at the partner company.
# of Sales Employees	The number of employees in the partner company's sales organization.
# of Service Employees	The number of employees in the partner company's service organization.
Growth Strategies	The partner's growth strategy.
Routes to Market	The partner's routes to market.
Expertise	A list of the partner company's special skills.

Field	Comment
Other Program Membership	Other companies with which the partner has a relationship. (This partner is a member of these companies' partnership programs.)
Partner's Competitors	A list of the partner company's competitors.

6 In the Products list, enter the partner's products and services that are relevant to your company. Add new records to the list, and enter the following information in their fields.

Field	Comment
Name	The name of the partner's product or service.
Version	The version of the partner's product or service.
Description	A description of the partner's product or service.
Service Product	Select this flag if the product is a service.
Sales Product	Select this flag if the product is a sales related product.
Part #	Enter the part number associated with the product or service.
Type	Enter the type of product.

7 In the Related Products list, add the brand owner company's products that are related to the partner's products that you entered. Add new records to the list, enter the following information in their fields.

Field	Comment
Product	The name of the brand owner's product or service.
Relation	Indicates the relationship of the brand owner's product to the partner's product. Examples are Component, Bundled, and Cross-Promoted.

Field	Comment
Integration Status	Indicates the status of integration between the brand owner's product and the partner's product. Examples are Integration In Progress and Integration Completed.
Description	A description of the product.
Vendor	Vendor name of the product.
Effective Start Date	The start date of the validated relationship between the brand owner's product and the partner's product.
Effective End Date	The end date of the validated relationship between the brand owner's product and the partner's product.
Orderable	Indicates whether the product is orderable.

To work with a partner company profile

■ Modify a record by selecting a field and changing the information.

Entering the Partnership Profile

The Partnership Profile screen holds information about your relationship with the partner company and the way you work together, and so it supplements the Partner Profile, which holds information about the partner company itself.

When you are first planning how you can work together with a partner company, the Partnership Profile screen lets you clarify your future relationship by discussing the items on this screen with people at the partner company.

To enter or view a partnership profile

1 Navigate to the Partners screen.

2 In the Partners list, select the partner whose partnership profile you want to display.

3 Click the Profile view tab.

4 Select Partnership Profile in the drop-down list in the Profile view, if the partnership profile is not already displayed.

The Partnership Profile view appears.

5 Enter or view information about this partnership in the Partnership Profile form.

Field	Comment
Description of Partnership	Enter a general description of the partnership.
Channel Sales Growth Rate	Enter the annual growth rate of the partner's sales of your products.
Yearly Channel Sales	Enter the partner's yearly sales of your products.
Quarterly Channel Sales	Enter the partner's quarterly sales of your products.
Start Date	Enter the date when the partnership was initiated.
End Date	If the partnership is terminated, enter the termination date.
Renewal Date	Enter the date when the partnership should be renewed.
Fees Paid	Select this flag to indicate that the partner has paid membership fees.
Internal Benefit	Enter the benefit of this partnership to your company.
Partners Benefit	Enter the benefit of this partnership to the partner company.
Satisfaction Index (1 - 10)	The channel manager can use this field to rate this partnership on a scale of 1 to 10.
Joint Markets	Select the market segments in which you and this partner will jointly operate.
Joint Routes to Market	Enter a description of your company's and the partner's joint routes to market.
Joint Growth Strategy	Enter a description of your growth strategy for this partnership.

6 In the Product Line List, enter your product lines that are relevant to this partnership, such as lines of products that you expect the partner to resell. Add new records to the list, enter the following information in their fields.

Field	Comment
Product Line	Choose a product line from a list of your company's product lines.
Description	A description of the product line is entered automatically.
Products	A list of products in this product line is entered automatically.
Product Line Manager	The name of the product line manager is entered automatically.

Entering Partner Management Activities

You often want to record activities that you should perform to manage your partners, such as a telephone call you must make or a meeting you scheduled. You can list these activities on the Partners screen, Activities view.

For more information about working with activities, see the chapter on activities in *Siebel Call Center User Guide* or *Siebel Sales User Guide*.

NOTE: Activities you add in the Partners screen are generally for your own use. However, you can also assign them to your own employees or to partner employees by selecting an employee's name in the Assigned To field.

To enter a partner management activity

1 Navigate to the Partners screen.

2 In the Partners list, select the partner to which the activity applies.

3 Click the Activities view tab.

The Partner Activities view appears.

4 In the Activities list, click the menu button, then click New Record to add a new record to the list.

5 Fill in the fields with the details of the new activity.

To work with partner management activities

■ Modify a record by editing the information in its fields.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete Record.

■ To display a list of your activities, including your partner management activities, from the application-level menu, navigate to the Activities screen.

Entering Partner Management Activity Plans

Siebel applications make it possible to create activity plans, which are templates that include lists of activities that are often performed in sequence. Using activity plan templates makes it easier to create complicated series of activities. If your company's Siebel applications administrator has created these templates, you can use them through the Partner Activity Plans view.

For example, you may often organize marketing events together with your partners. Organizing a marketing event requires a sequence of activities which are fairly standardized. You can create an event organization activity plan that includes these standard activities.

When you want to organize an event, use this activity plan, and assign each activity in it to the person who is responsible for it.

For more information about activity plan templates, see *Applications Administration Guide*.

NOTE: Generally, the activity plans that you add in the Partners screen are for your use. However, you can also assign these activities to your own employees or to partner employees by selecting an employee's name in the Activity record's Assigned To field.

To enter a partner management activity plan

1 Navigate to the Partners screen.

2 In the Partners list, select the partner to which the activity plan applies.

3 Click the Activity Plans view tab.

The Activity Plans list appears.

4 In the Activity Plans list, click the menu button, then click New Record to add a new record to this list.

5 Fill in the fields with the details of the new activity. Use the Template field picklist to choose an existing template.

The activities from that template are listed in the Activities list.

To work with partner management activity plans

■ Delete a record by selecting it, clicking the menu button, then clicking Delete.

■ To display a list of your activities, including activities from your partner management activity plans, from the application-level menu, navigate to the Activities screen.

Entering Partner Agreements

It is often useful to have a list of the agreements that you have made with a partner company, to refer to when you want to look up a specific agreement. Use the Partner Agreements view to record the agreements that you have made with your partners.

For more information on agreements, see the chapter on agreements in *Applications Administration Guide.*

NOTE: The partner agreements that appear in the Partners screen should not be confused with service agreements with your customers. Partner agreements are agreements between the brand owner and partner company.

To enter partner agreements

1 Navigate to the Partners screen.

2 In the Partners list, select the partner with which you have made the agreement.

3 Click the Agreements view tab.

The Agreements view appears.

4 In the Agreements list, click the menu button, then click New Record to add a new record to this list, then enter the details of the agreement.

To work with partner agreements

■ Modify a record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete.

Adding Partner Company Attachments

When you attach documents to a partner company's record, you can access them when you are working with that partner company. For example, if you write a report about a partner company, you can attach it to that company's record. Use the Partner Attachments view to attach files to partner records.

NOTE: The attachments you add in the Partners screen are for your company's use. Your partners cannot access them. To share files with a partner, you must add attachments to Account, Contact, or Market Development Fund records, which the partner can access.

To enter partner company attachments

1 Navigate to the Partners screen.

2 In the Partners list, select the partner to which you want to add the attachment.

3 Click the Attachments view tab.

The Partner Attachments view appears.

4 In the Attachments list, click the menu button, then click New Record.

The Attachments Form appears.

5 In the Attachments Name field, click the select button.

The Add Attachment File dialog box appears.

6 Browse to locate the file you want to attach to the partner company record and click Open.

The name of the file is entered in the File Name field of the new Add Attachment dialog box.

7 Click Add.

The name of the file appears in the Attachment Name field.

8 Fill out the other fields in the Attachments record.

To work with partner attachments

■ Modify a record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete.

■ Display the contents of the attached file by clicking its name in the Name field.

Entering Partner Contacts

The Contacts list is used to keep track of your business contacts at the partner company.

Partner employees must be in the Contacts list to be included in partner organization charts. You can also add contacts when you are creating an organization chart, and they will be added to the Contacts list.

For more information on adding and maintaining contacts, see the chapter on contacts in *Siebel Call Center User Guide* or *Siebel Sales User Guide*.

NOTE: Adding a contact in the Partner Contacts view will not give that contact access to the Siebel Partner Portal. If you want partner contacts to have access to Siebel PRM, you must also add them in the User Assignments list of the Partner Administration screen, or they must be added by the delegated administrator at their own company. For more information, see Chapter 4, "Working With New Partners."

To enter partner company contacts

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company where the contact is an employee.

3 Click the Contacts view tab.

The Contacts list appears.

4 In the Partner Contacts list, click the menu button, then click New Record to add a new record to this list.

5 Enter information about the contact.

Entering Partnership Contacts

The Partnership Contacts list is used to keep track of the key people who manage this partnership. It should include:

- **Key partner contacts.** Employees of the partner company who are responsible for managing the partner relationship.

- **Internal owners.** Employees at the brand owner company who are responsible for managing the partner relationship.

For more information on adding and maintaining contacts, see the chapter on contacts in *Siebel Call Center User Guide* or *Siebel Sales User Guide*.

NOTE: Partner employees must be in the partner Contacts list, described in the previous section, for you to be able to select them to be added to the Partnership Contacts list.

To enter partnership contacts

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company where the contact is an employee.

3 Click the Partnership Contacts view tab.

   The Key Partner Contacts list appears.

4 In the Key Partner Contacts list, click the menu button, then click New Record to add a new record to this list.

   The Key Partner Contacts form appears.

5 Click the select button for the Last Name field.

   The Pick Contact dialog box appears, listing employees already added to the partner Contacts list.

6 Select the record for the contact you want to add, and click OK.

The fields in the Key Partner Contacts form are filled out with information about this contact.

7 In the Internal Owners list, click the menu button, then click New Record.

8 In the Add Positions dialog box, select the person in your company who is the internal owner of this partnership contact. You can select more than one internal owner.

Adding Notes About a Partner Company

Partner notes let you enter text information about partner companies. For example, if a partner gives you driving direction to its office, you can enter the information in a note added to that company's record.

This information can be exclusively for your use or can be shared with colleagues in your company:

■ **Private Notes** are visible only to the person who entered them.

■ **Shared Notes** are visible to anyone in the brand owner company who can see the partner's records.

Use the Partner Notes view to enter notes about your partners for your use and the use of other people in your company.

NOTE: Partner employees do not have access to shared notes. They are used for sharing information within the brand owner company.

To enter notes about a partner company

1 Navigate to the Partners screen.

2 In the Partners list, select the partner to which the note applies.

3 Click the Notes view tab.

The Partner Notes view appears.

4 If the proper type of note is not already displayed, select Private Notes or Public Notes from the Show drop-down list.

5 In the Notes list, click the menu button, then click New Record to add a new record to this list.

6 Enter the note as text in the Description field of the new record.

To work with notes about a partner company

■ Modify a record by selecting a field and changing the information.

■ Delete a record by selecting it, clicking the menu button, then clicking Delete.

Creating a Partner Company Organization Chart

When you display a company organization chart of a large partner company, you can see every employee's position at a glance. Siebel PRM lets you define the hierarchy shown in the organization chart by specifying the manager for every contact: select the appropriate person in the Manager field of the Contact record.

Everyone in the organization chart must be on your contact list for that partner company. You can add new contacts in the Partner Organization Analysis view while you are working on the organization chart, and they will also be visible in the Partner Contacts view.

NOTE: The lower applet in the Partners Organization Analysis view has a drop-down list next to its name. Use this list to toggle between a Contacts applet, which has a list of your partner contacts, and an Organization Analysis applet, which has an organization chart. If the chart appears when you first open it, you must use this drop-down list to display the Contacts list in order to select each contact's manager. You can also use the Contacts list to add new contacts.

To create a partner company organization chart

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company whose organization chart you want to create.

3 Click the Organization Analysis view tab.

The Partner Organization Analysis view appears.

4 If the lower applet is the Contacts list applet, go on to Step 6. If the lower applet is the Organization Analysis applet, select Contacts from the drop-down list.

5 Select the partner employee whose manager you want to specify.

6 Click the select button for the Manager Last Name field.

The Pick Manager dialog box appears.

7 Select the person's manager and click Pick.

8 Repeat Step 6 and Step 7 to select a manager for each of the partner contacts.

9 Select Organization Analysis from the drop-down list to display an organization chart for the partner company.

To work with partner company organization charts

■ Maintain the chart whenever the company's structure changes by using the Pick Manager dialog box to change Manager Last Name fields as needed.

■ View the chart at any time by selecting the record of the partner company in the Partner screen and clicking the Organization Analysis view tab.

Uploading Partner Logos

The Siebel Partner Portal allows a partner to upload its company logo. You can use the partner logo for collaborative presentations or proposals that you want to co-brand.

The partner can upload multiple logos, because you may need its logo in different formats to use in different media. For example, you use .gif or .jpg format to display on the Web, and you may need a higher quality format for printed material.

The partner uploads logos by clicking on the Profile hyperlink, displaying the Company profile, and then displaying the Logos list. The partner can add a record to this list and select the graphics file for the logo.

After these logos are approved by the brand owner, the partner can specify which logo is displayed in the Partner Locator by selecting it in the Partner Profile Logo field of the Company Profile form. The brand owner can also specify which logo is displayed in the Partner Locator by selecting it in the Partner Profile Logo field in the Partner screen of the Partner Manager. Both partner and brand owner can access this field, and use it to select a logo of the type jpg, bmp, gif, or another web format to be displayed.

You must approve logos that the partner has uploaded before they can be used. When a partner submits a logo, its status defaults to submitted. You approve it by changing the status to approved. The partner can view the status in the Partner Portal but cannot change it.

You use the Siebel Partner Manager to approve, access and use all the partner's logos.

To approve or access a partner logo

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company whose logos you want to work with.

3 Click the Logos view tab.

4 To approve a logo, in the Status field of its record in the Logos list, select Approved.

5 To access a logo, in the Logos list, click the file name.

When you drill down on the file name, the Logo Details view appears, where you can see the logo.

Managing Partner Training Courses

Siebel eTraining is fully integrated with Siebel PRM. Using Siebel Partner Manager, brand owners can set up and manage web-based video format courses, classroom-based courses with live instructors, courses on CD, and distance learning courses. In addition, brand owners can use the Siebel Partner Manager to host and deploy web-based courses.

Siebel eTraining allows channel managers to deploy video, online, and in-class courses and tests for partner employees. You use the Siebel Partner Manager to:

- Enter and administer information about courses, classes, curricula

- Enroll partners in training courses

- Track enrollments for courses and classes as well as performance on tests and progress toward curriculum completion

- Create certification tests, establish minimum passing requirements for tests, and track partner employees' performance on tests

- Build and maintain libraries that contain training materials that enrollees can download

- Develop, administer, and track the results of online tests

For more information on setting up training courses and managing registration, see *Siebel eTraining Guide*.

Training From the Partner's Perspective

Partner employees use the Siebel Partner Portal to:

■ Check the schedule of courses they are enrolled in. (The partner does this by displaying the Training screen and clicking the View Your Class Schedule, View Your Course Schedule, or View Your Curriculums hyperlink.) They can drill down on a class or course to view more detailed information about it, such as topics, objectives, tests, materials, associated courses. Managers at the partner company can view the course enrollments of their reports by using the Training screen, Managers view.

■ Search for new training by browsing or searching lists of classes or courses or by viewing training appropriate to their job role or training in a convenient location. (The partner does this by displaying the Training screen and clicking hyperlinks such as: Find Courses, Find Curriculums, Find Courses by Job Role, Find Curriculums by Job Role, and Find Courses by Location.)

■ Enroll in new courses or classes. (The partner does this by clicking the Enroll button at top of the Courses or Class Detail view. For example, the user might click the Find Courses by Job Role hyperlink and navigate to the Courses by Job Role view. Then, the partner employee can select a Web-based course and drill down on the course. Then, the partner employee can click Enroll.) Then the system takes the partner to the shopping cart where the partner can pay the fee for the course; if there is no fee, the partner the shopping cart displays a fee of $0. If there is availability in the course or class, the user is automatically enrolled; if no space is available in the training course or class, the partner employee is put on a waiting list.

■ After the partner has enrolled or wait-listed for a course or class, the partner can see the course record in the My Training view. The partner employee can download training materials to review before taking the course. (The partner does this using the Course Details view.)

■ After a partner employee is enrolled in a Web-based course, the partner employee can take the course by navigating to the My Training view, clicking the My Self-Paced Courses hyperlink, selecting and drilling down on the course, and launching the course by clicking on the Course Launch button or using the applet level menu.

■ After completing courses or classes, partner employees can take tests and receive their grades directly from the Siebel Partner Portal. (The partner does this by navigating to the My Training view, selecting and drilling down on the training record, navigating to the Tests applet, selecting the appropriate test, and clicking the icon to the right of the test record to launch the test.)

The Training screen provides one point of entry for end user activities related to training, including viewing training course schedules, searching for and enrolling in new courses, downloading course materials, and taking certification exams.

Administering Partner Training

You use Siebel Partner Manager to administer partner training. You:

■ Enter information about courses, classes, and curricula, including course type (web-based video, instructor led, CD, or Distance Learning); job roles that would benefit from taking the course; times and locations of on-site classes; directions and hotels close to on-site classes.

■ Associate courses with price lists, so users can be charged appropriately.

■ Enroll partners in specific training courses.

■ Track partner enrollments in web-based courses and in classroom-based classes. (You enter this information in the Training Course Enrollments or Training Class Enrollments view.)

■ Track the test scores of enrollees. (You view this information in the Test Results view.)

■ Maintain an electronic library of training materials. (You enter this information in the Training Library view.)

■ Create online tests that are scored automatically when the test taker submits the tests. (You create the pool of questions in the Test Questions view. You create the tests in the Tests view.)

■ Administer distance learning for live Web-based courses. (You enter this information in the Distance Learning screen, by clicking the hyperlink View Available Sessions.)

For more information about administering Siebel eTraining, see *Siebel eTraining Guide*.

Tracking Partner Training

You can track the courses a given partner has taken or the partners who have taken a given course.

Displaying the Training Courses a Partner Has Taken

You can view the training courses a partner company has taken. For example, you can see if a new partner company has been taking the training needed to learn about your products.

To display the training courses a partner has taken

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company whose training courses you want to view.

3 Click the Course Enrollment view tab.

The Training Courses list appears. It includes partner employees who have enrolled in training courses and the titles of the training courses.

Displaying the Partners Who Have Taken a Training Course

You may also want to see a list of partner employees who have taken a training course. For example, if you recently created a new course for your partners, you can see whether it is popular among partner employees.

To display the partners who have taken a training course

1 Navigate to the Training Admin screen.

From the Show drop-down list, Courses should be chosen by default.

2 In the Courses list, select the course whose enrolled partners you want to view.

3 Click the Partner Enrollments view tab.

The Partner Enrollments list includes partner employees who have taken the course.

Certifying Your Partners

You can set up partner certification programs, to give your partners an opportunity to improve their skills and let your customers know which partners are most skilled.

For example, you might enroll new partner companies as silver partners. When a partner company's employees have taken ten training courses, answered 20 customer service requests, and generated $20 million in revenue, you might make the company a gold partner. And when employees have taken 20 training courses, answered 40 customer service requests, and generated $50 million in revenue, you might make the company a platinum partner.

A partner company can work on several certification programs at the same time. For example, a partner may work on becoming a certified reseller and a certified service provider.

To certify partners, you go through the following process:

■ Plan and create appropriate metrics for all of your certification programs.

■ Set up certification templates that specify the requirements for each level of certification in a certification program.

■ Record the partners' progress. You can enter the courses they have taken, or you can set up Siebel Business Process Designer to enter these values automatically. For example, when a partner uses the Siebel Partner Portal to take a training course, Siebel Business Process Designer can increment the value in the Actual# field for that partner's training courses.

■ Display a list of the certifications a partner company is working on, and check the progress on each certification.

Creating Certification Metrics

Before you can create any certification templates, you must create certification metrics.

A certification metric lets you find partners who are taking similar certification programs. For example, if you plan to develop a series of certification programs that require partners to take training courses, you could create a metric named # of courses taken. Then, when you evaluate partner performance, you can search on the metric field to list the certification programs that require training courses, and compare the performance of partners working on these programs.

A certification metric also lets you define the criteria for a particular certification. For example, you could define multiple criteria for a partner company to become a Certified Reseller. One of those criteria could be to generate $20 million in revenue. You would define this criterion by choosing a predefined metric named Sales Revenue and assigning a target amount value of $20 million.

A certification metric is not a mathematical formula that measures performance. Performance is measured using the Target and Actual fields of each certification definition. A metric lets you categorize criteria, so you can compare the performance of different partner companies measured using similar criteria.

To add a new certification metric

1 Navigate to the Application Administration screen.

2 From the Show drop-down list, choose List of Values.

3 In the List of Values list, click the menu button, then click New Record.

4 A new record is added to the list.

5 Click the select button.

6 The Pick Value Type dialog box appears.

7 Choose CHAMP_METRIC_CD, and click OK.

8 In the Order field, enter the order in which this metric appears on the list of values in the picklist for the Metric field of Certification Criteria records.

9 In the Display Value field, enter the name for the metric that will appear in the picklist for the Metric field of Certification Criteria records.

10 Click Language Name, and select the language for this record.

11 Other fields are optional and are not generally used in certification criteria. Fill them out only if you have a special reason to do so.

This metric is added to the Metrics picklist in Certification Criteria records.

Creating Certification Templates

A certification template includes general information about a certification program, such as its name and description, and a list of the criteria required for that certification.

For example, you could create a template for companies that want to become gold partners with two criteria: that a partner company's employees must take ten training courses and answer twenty customer service requests.

There are three fields that define criteria for certification:

■ **Target #.** Enter the target number here when you create the certification template, and enter the actual number in the Actual # field as the certification program is being completed. For example, if you require a partner to resell one hundred of your computers to become a gold partner, the measurement is the number of computers that a partner sells, so you would enter 100 in the Target # field.

■ **Target Amount.** Enter the target amount here when you create the certification template and enter the actual amount in the Actual Amount field as the certification program is being completed. For example, if you require a partner to resell $100,000 of your computers to become a gold partner, the measurement is the amount of revenue for a partner's sales, so you would enter 100,000 in the Target Amount field.

■ **Condition Clause.** If the criterion has a condition, enter a brief description of the condition that the partner company must satisfy when you create the certification template and select True or False in the Condition Met field as the certification program is being completed. For example, if the condition is to have the partner go to a trade show to display your computers, you would select True when the partner goes to the show.

In addition, if you are using the Target # or Target Amount field, you can optionally specify what the target refers to in the Training Course or Product field.

For example, in one certification definition, you might enter 100 as the target number and select Laptop computers as the product, showing that 100 refers to this product. In a second definition, you might enter 100 as the target number and select Printers as the product, showing that 100 refers to this product. Then the partner would have to resell one hundred laptop computers and one hundred printers to receive this level of certification.

To create a certification template

1 Navigate to the Partner Certifications screen.

2 From the Show drop-down list, choose Certification Templates.

3 In the All Certification Templates list, click the menu button, then click New Record to add a new record to this list.

4 Enter information about the certification template in the new record.

Field	Comment
Template Name	Enter the name of the certification template.
Validity (months)	Enter the number of months that a certification, once gained, is valid.
Created	The system enters the date when this certification record was created.
Created By	The system enters the employee who created this template record.
Updated	The system enters the date when this certification record was last updated.
Updated By	The system enters the employee who last updated the certification template.
Active	Leave this field unchecked while you are working on the template. When the template is done, check the field to make the template active, so your partners can view it.
Description	A description of this certification for your own use.

5 Click the Certification Criteria view tab.

6 In the Certification Criteria list, click the menu button, then click New Record to add a new record to this list.

7 Enter the criteria in the new record's fields.

Field	Comment
Condition Clause	If you are using a condition as the target, enter it here.
Metric	Select a metric, which you use to categorize and define your certification criteria.
Target #	If you are using a quantity as the target, enter the target number here.
Target Amount	If you are using an amount as the target, enter the target amount here.
Training Course	Optionally, choose the training course that must be completed as part of the criteria.
Product	Optionally, choose the product that the partner must have sold or been trained on, as a part of the criteria.

Associating Certifications with a Partner Company

You can create a certification record for each of your partners and associate these records with certification templates.

You can also set up Siebel Business Process Designer to automatically enter the value Certified in the Status field of the Certification record when values are filled in the Certification Criteria list that satisfy all the requirements of the certification, making the partner company a certified partner.

For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide.*

To create a certification record and associate it with a partner

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company for whom you want to create a certification

3 Click the Certifications view tab.

   Certifications view appears.

4 In the Certifications applet, click the menu button, then click New Record.

5 Enter information in the following fields.

Field	Comment
Template Name	Click the select button and select a predefined template. The criteria in the Certification Criteria applet are automatically filled based on the template chosen.
Certification Name	Enter a name for the certification.
Description	Enter a description of the certification.
Partner	Enter the name of the partner company.
Active	This field is automatically set to true if the End Date is greater than today.
Status	Indicates the status of the certification - In Progress, Not Started, Certified.
Certified Date	The date on which the status is set to Certified is entered automatically when you select this status.
End Date	The end date is entered automatically, set based on the certified date and the validity (in months) defined for the certification template.

Recording Partners' Progress

Partner employees can view certification programs in the Certification view of the Siebel Partner Portal. This view has Actual#, Actual Amount, and Condition Met fields in addition to the Target#, Target Amount, and Condition clause fields whose values you entered when you created the template, and your partners can view these fields to see what a certification program's requirements are.

You can configure Siebel Business Process Designer to fill out these fields automatically, based on actions that partner employees take when they register for training courses, or work with Opportunity records, or work with Service Request records, and so on.

For more information about Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Checking a Partner's Progress

At any time, you can look up each certification a partner company is working on and how much progress has been made on each one.

To look up a partner company's certifications

1 Navigate to the Partners screen.

2 In the Partners list, select the partner company whose certifications you want to check.

3 Click the Certifications view tab.

Certification view appears.

4 Select any certification record in the Certifications list.

The criteria for that certification are displayed in the Certification Criteria list.

In the Certification Criteria list, compare the Target#, Target Amount, or Condition Clause field for each record with the Actual#, Actual Amount, or Condition Met field for each record.

Displaying Certified Partners

You can display the partner companies who have achieved each of your certification levels in the Partner Certification screen.

To display certified partners

1 Navigate to the Partner Certifications screen.

2 From the Show drop-down list, choose Certification Templates.

3 In the All Certification Templates list, select a certification template.

4 Click the Certified Partners view tab.

The certified partners list includes the partners with that certification.

Displaying Certifications Across Partners

You can display the certifications all of your partners have completed or are working on in the Partner Certifications screen. The list includes the status of each certification.

To display certifications across partners

1 Navigate to the Partner Certifications screen.

2 From the Show drop-down list, choose All Certifications Across Partners.

The partner certifications appear.

Communicating with Your Partners

Apart from the methods of sharing data covered in earlier chapters, Siebel PRM gives you two special methods of communicating with your partners:

■ **Partner Alerts.** Text messages that are targeted to specific partners and displayed on their Siebel Partner Portal home page.

■ **Siebel eBriefings.** News updates about your company that are targeted to specific partners and displayed on Siebel Partner Portal home page and on the eBriefings page of the Siebel Partner Portal, which the partner can also use to track information about other companies.

Using Partner Alerts

Partner alerts are text messages that you send to your partners or to selected groups of recipients and which are displayed on the partners' home pages.

You can create a new message in the Alert Administration screen. You can enter the message in plain text or in HTML format. You can use an HTML authoring tool to create the message and then paste the HTML code into the new message.

Partner alerts support basic HTML tags. When a user is creating the body of a message in the Alert Administration screen, More Info form, the user can move the the cursor to the icon that looks like the letter "i" to display a list of the tags that are supported:

■ < b > ... < /b > bold

■ < i > ... < /i > italic

■ < u > ... < /u > underline

■ < h4 > ... < /h4 > heading size

■ < a href = "url" > ... < /a > hyperlink to url

Do not use HTML tags other than these. Do not use tags that define the HTML document, such as < HTML > , < /HTML > , < body > , < /body > , or < header > , < /header > .

The partner employees to whom you have sent this message will see the abstract in the Partner Alerts applet of their Siebel Partner Portal home page between the activation date and the expiration date that you specified. This applet lists abstracts of their partner alerts in an order that depends on the priority you gave each alert. The abstract is a hyperlink, which partners click to see the entire message.

You can also add literature or products as attachments, if desired. The recipients can view them through tabs that appear after they click on a hyperlinked abstract on the home page.

There are three types of messages currently defined:

- **Partner alerts.** Visible to partners only. You determine whether to send them to all partners or selected recipients.

- **Program information.** Appears on the registered user home page only.

- **Public information.** Appears on the unregistered user home page only.

Creating Partner Alert Keywords

Optionally, you can assign one or more keywords to each message, so you can specify which partners see messages with specific keywords by using Siebel Personalization.

Keywords can be reused across multiple messages. Keywords are entered separately for each message. Because they are free-form, you must be very disciplined when you enter them if you plan to use them for personalization across messages. Personalization will compare the keyword to attributes of the person logging into the Portal and only display those messages with a keyword corresponding to the profile.

For more information about personalization, see *Personalization Administration Guide*.

Creating Partner Alerts

Use the Alert Administration screen to create a partner alert.

To create a partner alert

1 Navigate to the Alert Administration screen.

2 In the Partner Alerts list, click the menu button, then click New Record.

3 Enter information in the fields of the new record and the More Info form.

Field	Comment
Priority	Choose the priority of the message. This determines where the message appears in the list of partner alerts on your partners' Siebel Partner Portal home pages. Messages with the highest priority will be at the top of the list.
Type	Choose the type of the message. This determines which type of partner the message is displayed for. Select Partner Alert to display the message for employees of registered partner companies, Program Information to display the message for self-registered individual partners, or Public Information to display the message for unregistered anonymous users.
Partner	You must select the Partner check box for the alert to be displayed to partners.
Message Body	Type in the text of the message, including HTML formatting code if desired.
Abstract	Enter a brief abstract that summarizes the message. This will appear as a hyperlink on your partners' Siebel Partner Portal home pages.
Keywords	Enter Keywords that the user will be able to search on to find this message. You can also use keywords for personalization.
All Users	Select this check box if you want the message to appear to all partner users. Do not select this check box if you want to direct the message to specific partner companies or specific positions.
Activation	Enter the date when the message will first appear to your partners.
Expiration	Enter the date when the message will no longer appear to your partners.

Field	Comment
Created	Automatically filled in with the date and time the message was created.
Created By	Automatically filled in with your login name.

4 If you want to add literature as an attachment to the message:

a Click the Literature view tab.

b In the Literature list, click the menu button, then click New Record.

The Add Literature dialog box appears.

c In the dialog box, select the Literature records you want to add.

d In the dialog box, click OK.

5 If you want to add a product as an attachment to the message:

a Click the Product view tab.

b In the Products list, click the menu button, then click New Record.

The Add Internal Products dialog box appears.

c In the dialog box, select the Products you want to add.

d In the dialog box, click OK.

6 If you want to specify partner organizations to which you will send the message:

a Click the Recipients view tab.

b If it is not already selected, select Recipient Partners in the Show drop-down list.

c In the Recipients list, click the menu button, then click New Record.

The Add Recipients by Partner dialog box appears.

d In the dialog box, select the partner organizations that will receive the alerts.

e In the dialog box, click OK.

7 If you want to specify positions to whom you will send the message:

    a Click the Recipients view tab.

    b Select Recipient People in the Show drop-down list.

    c In the Recipients list, click the menu button, then click New Record.

       The Add Positions dialog box appears.

    d In the dialog box, select the people who will receive the alerts.

    e In the dialog box, click OK.

Using Siebel eBriefings, eContent Services, and eContent Broker

The eBriefings screen of the Siebel Partner Portal lets your partners use:

- **Siebel eBriefings.** Aggregates relevant business information from inside and outside your organization into personalized web pages. Siebel eBriefings displays enterprise data from the Siebel database, such as opportunities, service requests, and contacts, plus news and other information from external content providers.

- **Siebel eContent Services.** Aggregates news and company information from multiple sources and distributes it to Siebel eBriefings customers. Customers who subscribe to Siebel eContent Services receive out of the box integration with external news and company information. Siebel eContent Services includes the leading newswires, business magazines, newspapers, trade journals, company profiles, corporate profiles, corporate relationship information, market data, and other relevant content in context to Siebel data.

- **Siebel eContent Broker.** Siebel eBriefings can display content from any external source that is properly configured. You can configure additional third-party information sources using Siebel Tools to configure applets and business components so that they can handle external content. These configuration tasks include:

  - Configuring a business component to handle external data

  - Configuring an applet to display external data

  - Modifying the table of contents applet

  - Adding the applet to a view

Partner employees can also use the Tracking Profile views of the eBriefings screen to choose accounts, competitors, industries, or products that they want to track. These tracked items appear in the eBriefing screen, in views separate from the personalized briefing that you set up, such as the Accounts Briefings view and the Competitors Briefings view.

The information displayed is personalized for each partner employee. You set up this screen to specify which information appears.

For example, you can configure the Siebel Partner Portal home page so it has a Company In the News applet or a New Products applet, to help partner employees stay up to date on the latest news and product information from the brand owner company.

Then, whenever partner employees log onto the Siebel Partner Portal, they immediately see this information, which will help them on sales calls. In this applet on the home page, the partner agent clicks these new product and news hyperlinks to get more detailed information. In addition, partner employees will use their own personalized My Briefings screens to see information about accounts and competitors they are tracking, and about other information they are tracking, such as finance and industry news.

You set up Siebel eBriefings for partner employees in the same way that you set up Siebel eBriefings for your own employees.

For more information on Siebel eBriefings, see *Siebel eBriefings Administration Guide*.

Administering Partner Satisfaction Surveys

Partner satisfaction surveys allow you to measure how satisfied your partners are with their working relationship with your company.

Partners employees can go to the Partner Satisfaction screen of the Siebel Partner Portal, click a link to display the survey, answer a series of multiple-choice questions, enter free-form comments, and submit the survey.

Viewing the Results of Partner Satisfaction Surveys

The brand owner can use the Partner screen of the Siebel Partner Manager to display the results of these surveys. These results help them to develop plans to improve their working relations with their partners.

To view the results of partner satisfaction surveys

1   Navigate to the Partners screen.

2   In the Partners list, select the partner company whose training courses you want to view.

3   Click the Survey view tab.

    A list of all surveys submitted by employees of that partner company appears, with fields that represent overall satisfaction and the questions in each survey.

4   Select a record in the Survey list and scroll down to see the Partner Satisfaction Survey form, which includes the full questions and answers for the survey, and the Satisfaction Level form, which lets you view several charts of the overall satisfaction level for the survey.

Configuring Partner Satisfaction Surveys

You can use the partner satisfaction surveys that are provided with Siebel PRM, or you can change these surveys by configuring them using Siebel Tools.

To modify questions, you must configure the product in three places:

■   In the Partner Satisfaction Survey Applet (SCW) applet, each question corresponds to a control, which you can modify using Siebel Tools.

■   In the Partner Satisfaction Survey Questions applet, each question corresponds to a control, which you can modify using Siebel Tools.

■   In the Partner Satisfaction Survey List Applet, each question corresponds to a list column, which you can modify using Siebel Tools.

For more information about using Siebel Tools, see *Siebel Tools Reference*.

Reporting on Partner Performance **14**

This chapter describes the ways that you can use Siebel PRM to produce reports about partner companies, and to analyze partner performance.

About Partner Performance and Reporting

Siebel PRM gives you a number of ways to analyze partner performance, including the following:

■ **CHAMP Planning and Partner Performance Reports.** CHAMP planning lets you create initiatives and joint business plans with your partners. Because these plans have clearly defined objectives and action plans, you can create and use CHAMP metrics to measure the success of each partner company in achieving its objectives. You can also use the Partner Performance view of the Partners screen to view reports about the performance of a partner.

■ **Assessments.** Assessments let you evaluate partner performance based on criteria that you specify in assessment templates. They let you define any criteria that meet your needs.

■ **Siebel PRM Reports.** Siebel PRM includes many built-in reports, which let you integrate information and performance results from different tools. These prebuilt reports include Smart Reports, which incorporate best practices from sales and call center applications, and Parameterized Reports, which let the user customize the report at runtime.

■ **Partner Analysis.** Partner Analysis uses Siebel Analytics and the Siebel Data Warehouse. Partner Analysis includes nearly 200 prebuilt, partner-specific reports to help brand owners assess individual partner performance and the success of the partnership program as a whole. In addition, Siebel PRM includes hundreds of prebuilt reports for sales analysis, service analysis, marketing analysis, and executive analysis within your organization. The reports focus on key performance indicators across a large number of predefined metrics. Siebel Analytics also lets users design new reports using a drag and drop interface.

You can use one or more of these methods of reporting or evaluating partner performance, depending on your business needs.

Using CHAMP Planning

Channel and Alliance Management Process (CHAMP) is an established process that allows brand owners to work collaboratively with partner organizations and evaluate the partner's performance.

CHAMP planning involves creating partnership initiatives and partner plans with clearly defined objectives and action plans, so you can measure the success of each partner company in achieving these objectives.

After you execute the plan, you measure partner performance against the established objectives.

For more information about CHAMP planning and reporting, see Chapter 5, "CHAMP Planning."

Using Partner Performance Reports

Performance reports measure partner performance as you do in CHAMP planning, without going through the entire process of setting up CHAMP initiatives and action plans. You only have to enter objectives and metrics.

These reports are read-only. In order to create objectives for a partner and measure them, you have to first create a dummy CHAMP Plan for this partner in the CHAMP Planning screen and add objectives to this plan. At the end of the objective time period, you should enter the actual values. The Partner Performance Reports will display the objectives that you created for this partner. You can filter these objectives based on the Plan, Plan Period, and the Metric fields.

The advantage of using these Performance Reports is that you do not have to create comprehensive CHAMP Plans with highlights and action plans, and you do not have to work closely with the partner to jointly approve the plans. This approach would make sense when you have hundreds or thousands of second or third tier partners, and you want to track their performance but you do not want to engage in detailed planning sessions with each partner.

The Partner Performance view is driven by CHAMP objectives. It uses the objectives' metrics, target number and actual number, target amount and actual amount, condition clause and condition met in the same ways as CHAMP objectives.

Each Partner Performance report measures the success of one or more objectives, which work like CHAMP objectives. The report is based on the target number or target amount that you entered when you created the objective. For example, if the objective is to sell computers, the target number might be 1000 computers sold in the quarter, or the target amount might be $2 million in sales for the quarter.

At the end of the performance report period, you can manually enter the actual number or actual amount for the objective (for example, if 1124 computers were sold, or if $2,231,426 of computers were sold). However, it is best to create workflow rules or business services to calculate the actual values automatically based on transactional data such as opportunities, service requests, orders, and so on.

The sample database includes an example of such a workflow. Its name is CHAMP Update Metrics Workflow. The name of the corresponding business service is eChannel CHAMP Services.

To create performance reports, you go through the following process:

- **Create a sample CHAMP plan.** In this case, the user is creating this plan just to serve as a placeholder for the performance objectives. The plan must be created because performance objectives cannot exist without being associated with a plan. For more information on creating a CHAMP plan, see Chapter 5, "CHAMP Planning."

- **Create performance objectives.** Use the Plan Objectives view to create performance objectives. For more information on creating performance objectives, see Chapter 5, "CHAMP Planning."

- **View the partner's performance.** Use the Partner Performance view of the Partners screen to view reports on the performance of the partner company, as described below.

To view partner performance

1 Navigate to the Partners screen.

2 In the Partners list, choose the partner whose performance you want to evaluate.

3 Click the Partner Performance view tab.

4 Choose Performance Over Time from the Show drop-down list in the Partner Performance list.

5 In the Performance Over Time (Amount) or the Performance Over Time (Quantity) applets, use the drop-down lists to choose the time periods you want to display a chart for and the type of chart you want to display.

   Charts are displayed showing the partners performance during the time period as measured by an amount metric or by a quantity metric.

6 In the Show drop-down list of the Partner Performance list, choose Performance On A Metric.

7 In the Plan Objectives list, use the drop-down lists to choose the metric, the partner, the plan, and the plan period that you want to measure performance on.

8 In the Performance On a Metric (Amount) or the Performance On a Metric (Quantity) applets, use the drop-down lists to choose the chart you want to display.

   Charts are displayed showing the partner's performance against this metric for an amount metric or for a quantity metric.

Using Assessments to Evaluate Partner Performance

Assessments give you a quick way to evaluate the performance of partner companies based on the criteria that you specify. First, your Siebel applications administrator must create one or more assessment templates that specify what factors to use to evaluate the partner. Then you can attach a template to the partner's record and see how well the partner scores.

Assessments can also be used to evaluate accounts, opportunities, and contacts based on the criteria in the assessment template. You can define any criteria that meet your needs.

For information about creating assessment templates, see the section on setting up assessment templates in *Siebel Applications Administration Guide*.

To enter a partner company assessment

1 Navigate to the Partners screen.

2 In the Partners list, select the partner that you want to assess.

3 Click the Assessments view tab.

The Assessments list appears.

4 In the Assessments list, click the menu button, then click New Record to add a new record to this list.

5 Fill in the fields with the details of the assessment. In the Template field, choose an existing assessment template.

The factors that are evaluated by that template and the score for each factor are listed in the Assessment Attributes list.

6 In the Assessment Attributes list, enter the actual values for the assessment attributes.

7 To see how well the partner did overall, view the values in the Score, Percent, and Max Possible Score fields of the Assessments record.

To work with partner assessments

■ Modify a record by selecting a field and changing the information.

■ Delete a record by clicking the menu button and then clicking Delete Record.

Using Siebel PRM Reports

Siebel PRM lets your employees and partner employees run reports in batch or interactive mode, and distribute those reports. Users can schedule reports so they run periodically at a specified time, or can run long reports at off-peak times.

Siebel applications' prebuilt reports include Smart Reports, which incorporate best practices from sales and call center applications, and Parameterized Reports, which let the user customize the report at runtime.

To optimize performance, report output is generated in DHTML format and sent to the browser one page at a time.

There are a wide variety of reports available that Siebel PRM shares with other Siebel applications. The following reports are specific to Siebel PRM:

■ **Partner List.** Report on the partners currently displayed in the Partner list. Can be filtered using queries. Available in the Siebel Partner Manager's partner list views (My Partners, My Team's Partners, and so on).

■ **Partner Profile.** Report on the full Partner Profile for the current or selected partner record. Available in the Siebel Partner Manager's partner list views (My Partners, My Team's Partners, and so on).

■ **Partner Report Card.** Full report of how the partner has performed in meeting its CHAMP objectives, including lists of objectives for each plan the partner participates in and charts of the partner's targets and actuals. Available in the Siebel Partner Manager's partner list views (My Partners, My Team's Partners, and so on), CHAMP Plan view.

■ **CHAMP Partner Plan.** Summary of a partner's CHAMP plans, including each plan and the objectives associated with each plan. Action and Opportunity plans are also included. Available in the Siebel Partner Manager's partner list views (My Partners, My Team's Partners, and so on), CHAMP Plan view.

■ **Marketing Funds Detail.** Report that lists the funds and gives details on each fund, including the fund type, the current balance, totals for debits and credits, and a list transactions. Available in the Siebel Partner Manager's Fund Design view.

■ **Partner Operations.** Report that lists the partners currently displayed in the Partners list and the transactional data that each partner is working on, including accounts, opportunities, orders, quotes and service requests. Can be filtered using queries. Available in the Siebel Partner Manager's Partner Operations view.

■ **Fund Request Summary.** Report that lists market development funds and summarizes the fund requests for each fund, including request details such as amount requested, amount approved, approver, and status. Available in the Siebel Partner Manager's Fund Request view and the Siebel Partner Portal's Fund Request view.

To produce a report

1 Navigate to one of the screens where that report is available.

2 If necessary, perform a query to filter the data.

3 If you are using the Siebel Partner Manager, choose Reports from the View menu. If you are using Siebel Partner Portal, click the Reports button.

4 In the Reports list, select the report that you want to run.

5 Click Run.

Siebel Analytics

The Siebel Partner Manager and Siebel Partner Portal use Siebel Analytics to provide a variety of different types of reports.

For more information about Siebel Analytics, see *Siebel Analytics User Guide* and *Siebel Analytics Installation and Administration Guide*.

Siebel Partner Analysis

Siebel Partner Analysis includes predefined reports that you can use to gain insight into your company's and partners' performance. It also includes the ability to create ad hoc reports, so you can produce the reports you need.

Siebel Analytics' predefined reports cover most business reporting needs.

Here is one scenario showing how a marketing manager, channel manager, or other executive at the brand owner company might use Siebel Partner Analytics to analyze partner performance:

- The channel manager at a brand owner company wants to evaluate performance of partner organizations, in order to find out the following:

  - Which partners are bringing in the most revenue

  - Which types of partners are bringing in the most revenue

  - Which partner tiers have the highest margins and the greatest sales volume

  - Which products and product lines partners are selling

  - Which partners are closing deals most quickly

  - Which partners are responding to service requests quickly

  - Which partners are creating the most quotes

  - Which partners are engaging in the most (or fewest) activities per deal

  - Which partner territories have the greatest number of opportunities

  - Which partners have the greatest expected revenue this quarter

■ In the Siebel Partner Manager, the brand owner's channel manager navigates to the Partner Analytics screen to view available prebuilt reports. The brand owner clicks on the view tab for the report category to display a list of reports in that category, and then clicks on a report hyperlink to bring up that report with charts.

■ The brand owner can analyze information further by using filters based on business objects. For example, if all partners are displayed in the report initially, the brand owner can analyze information by partner type (such as reseller, consulting partner, VAR), tier (such as Platinum, Gold, Silver), and territory. The brand owner also can analyze information by account, product, month, quarter, and year.

■ If there is not a prebuilt report that displays the information the brand owner wants, the brand owner can click the Ad Hoc Analysis view tab to create a new report. This view includes drag-and-drop tools used to develop the new report.

Viewing Available Siebel Analytics Reports

In addition to Partner Analytics, the Siebel Partner Manager has several screens with Siebel Analytics reports for a variety of purposes. The following screens allow the brand owner to use Siebel Analytics:

■ Executive Analytics

■ Commerce Analytics

■ Marketing Analytics

■ Partner Analytics

■ Sales Analytics

■ Service Analytics

■ Segmentation Analytics

■ Partner Marketing Analytics

The analytics screens and views that a user sees depend on the user's role, so they may not see all of these screens.

To view available Siebel Analytics reports

1 Navigate to one of the screens listed above.

2 Use the Show drop-down list to display the different categories of reports available on that screen.

Siebel Portal Analytics

The Siebel Partner Portal provides Siebel Analytics reports for your partners, which they can use to analyze their performance in sales, service, marketing, commerce, and training.

The partner portal analytics incorporates visibility rules to ensure that one partner does not have access to another partner's reports.

The views used in Partner Portal Analytics include the following:

■ Executive Analytics

■ Sales Analytics

■ Service Analytics

■ Marketing Analytics

■ Commerce Analytics

■ Training Analytics

The analytics screens and views that a user sees depend on the user's role, so they may not see all of these views.

To view available Siebel Analytics reports

1 The partner navigates to the Analytics screens.

2 The partner uses the Show drop-down list to display the different categories of reports available on that screen.

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