



# **Siebel High Tech and Industrial Manufacturing Guide**

Siebel Innovation Pack 2013

Version 8.1/8.2

September 2013

**ORACLE®**

Copyright © 2005, 2013 Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

#### Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

#### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

# Contents

## **Chapter 1: What's New in This Release**

## **Chapter 2: Overview of Siebel High Tech and Industrial Manufacturing**

Key Features of Siebel High Tech and Industrial Manufacturing 11

About Modules and Options 12

Differences Between Siebel PRM and Siebel High Tech and Industrial Manufacturing 12

## **Chapter 3: Getting Started with High Tech and Industrial Manufacturing**

About Setting Up Siebel High Tech and Industrial Manufacturing 15

Administrative Setup Tasks for Siebel High Tech and Industrial Manufacturing 16

    Making Products Eligible for Design Registration 16

    About Setting Up Incentives to Register Design Programs 17

    About Setting Up Email Notification of Approval of Design Registration 17

## **Chapter 4: Design Registration, Opportunity Management, and Design Win**

Overview of Design Registration, Opportunity Management, and Design Win 19

Scenario for Design Registration and Win 20

Process of Distributor Selling Components to OEM 21

    Submitting a Registration for a Design Program (Distributor) 21

    Reviewing and Approving the Registration (Supplier) 24

    Checking Whether a Registration Request was Approved (Distributor) 25

    Entering a Design Win or Loss (Distributor) 25

    Submitting Point-of-Sales Data (Distributor) 26

    Tracking Sales (Supplier) 27

    Viewing Point-Of-Sales Data for a Design Program (Distributor) 27

Process of Internal Salesperson Selling Components to OEM 28

    Submitting a Design Opportunity 28

    Approving the Design Opportunity 29

Verifying Whether a Registration Request was Approved 30  
Entering a Design Win or Loss 30  
Tracking Design Opportunities 31

## **Chapter 5: Special Pricing Authorization**

Overview of Special Pricing Authorization 33  
Scenario for Special Pricing Authorization 33  
Process of SPA Quote and Claim Management 34  
    Submitting an SPA Quote (Distributor) 34  
    Reviewing and Approving SPA Quotes (Supplier) 36  
    Submitting an SPA Claim (Distributor) 37  
    Validating an SPA Claim (Supplier) 40

## **Chapter 6: Market Development Funds Management**

Overview of MDF Management 41  
Key Features of MDF Management 42  
Scenario for MDF Management 43  
Process of Setting Up MDF Programs 43  
    Creating MDF Snapshot Periods 44  
    Making Accounts Eligible for MDF Participation 44  
    Enabling the HTIM MDF Period Ending Process Workflow 45  
    Setting Up MDF Approval Authority Limits 45  
Creating an MDF Program and Program Account 45  
Setting Up a Program Account's First Snapshot 46  
Removing a Participant From an MDF Program 47  
Adding a Credit to a Program Account 47  
Creating a Pre-Approval 48  
Reviewing a Pre-Approval 50  
Creating a Claim 51  
Reviewing a Claim 52

## **Chapter 7: Workflows for High Tech and Industrial Manufacturing**

HTIM SPA Quote Approval Workflow	55
HTIM Validate Claim Items Workflow	57
HTIM MDF Period Ending Process Workflow	59

## **Index**



# 1

## What's New in This Release

### **What's New in Oracle's Siebel High Tech and Industrial Manufacturing Guide, Version 8.1/8.2**

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





# 2

## Overview of Siebel High Tech and Industrial Manufacturing

This overview chapter includes the following topics:

- [“Key Features of Siebel High Tech and Industrial Manufacturing” on page 11](#)
- [“About Modules and Options” on page 12](#)
- [Differences Between Siebel PRM and Siebel High Tech and Industrial Manufacturing on page 12](#)

Oracle’s Siebel High Tech and Industrial Manufacturing can be used to help component manufacturers sell products in the channel and to end customers, as well as to manage Market Development Funds (MDFs).

When Siebel High Tech and Industrial Manufacturing is used to sell components to manufacturers, the companies involved in the sale are the:

- **Component supplier.** This company manufactures components that are used in the production of final or assembled products. For example, it might manufacture semiconductor chips, specialized light bulbs used in automobiles, or ball bearings.
- **Original equipment manufacturer (OEM).** This company manufactures the final products that use the components. For example, it might manufacture computers or automobiles.
- **Distributor.** This company sells the component supplier’s products to the OEM. For example, it might sell semiconductor chips to computer manufacturers or specialized light bulbs to automobile manufacturers.

Component suppliers generally have their own sales force, which sells directly to OEMs and concentrates on strategic accounts. Component suppliers usually use distributors for sales to smaller accounts.

When Siebel High Tech and Industrial Manufacturing is used to manage MDFs, the companies involved are the:

- **Brand owner.** The company owning the brand.
- **Partner reseller.** A company that sells a brand owner’s products to end customers.

### Overview of Design Registration and Win

Selling components to OEMs requires a substantial amount of design work by the OEM, and the sales cycle for the distributor is long and requires significant investments of resources.

To protect themselves from competition during this long design period, distributors use Siebel High Tech and Industrial Manufacturing to register designs. If the registration is approved, the distributor typically receives financial incentives from the manufacturer, such as special off-book pricing. Distributors without registration do not get those incentives, so it is unlikely that they would invest their resources in this project.

## Overview of Siebel High Tech and Industrial Manufacturing ■

If the distributor or salesperson successfully convinces the OEM to use this component in this product, then the distributor or salesperson uses Siebel High Tech and Industrial Manufacturing to change the status to design win.

The goal is to give the distributor an incentive to spend time with the OEM, designing the supplier's component into the OEM's product. After the distributor owning the registration gets the design win, the manufacturer will typically grant them additional margins through a special pricing authorization (SPA). Competing distributors will not have the same cost base as the distributor owning the registration, so they cannot offer the same price to the OEM.

For more information about design registration and win, see [Chapter 4, "Design Registration, Opportunity Management, and Design Win."](#)

### Overview of Special Pricing Authorization

In some cases, a distributor may need to apply for a special price below the usual book price for a component, in order to protect its margin.

Siebel High Tech and Industrial Manufacturing supports special pricing authorization as follows:

- The distributor negotiates with an OEM who is willing to offer a certain price.
- That price would reduce the distributor's margin below its typical level.
- The distributor applies for a lower book price to restore expected margin.
- The component supplier decides whether to approve the special price.
- If the special price is approved, the distributor ships components and then claims the difference between book price and authorized price.
- The supplier approves the claim and pays the distributor the difference between the book price and the special price.

For more information about special pricing authorization, see [Chapter 5, "Special Pricing Authorization."](#)

### Overview of Market Development Fund Management

MDF Management allows companies and manufacturers to:

- Set up co-op or MDF incentive programs.
- Identify participating partners and automate creation of partner program accounts.
- Manage the fund request pre-approval process.
- Manage claims against pre-approved fund requests.

For more information about MDFs, see [Chapter 6, "Market Development Funds Management."](#)

# Key Features of Siebel High Tech and Industrial Manufacturing

Siebel High Tech and Industrial Manufacturing includes an employee application and the Partner Portal.

## Siebel High Tech and Industrial Manufacturing Employee Application

Siebel High Tech and Industrial Manufacturing incorporates most of the features of Siebel applications, including the partner management features from Siebel PRM, such as the Administration - Partner screen.

It also has the following screens that are specific to the high tech and industrial manufacturing industries:

- **Design Programs.** Used by the component supplier's internal salespeople to enter opportunities and related information about the opportunity.
- **Administration - Design Opportunities.** Used by the component supplier to review newly submitted design registrations.
- **SPA Quotes.** Used by the component supplier to review distributors' requests for special pricing.
- **SPA Claims.** Used by the component supplier to review claims submitted by distributors against approved SPA quotes.
- **MDF Claims.** Used by the brand owner to review and approve MDF claims submitted by partners.
- **MDF Pre-Approvals.** Used by the brand owner to review and approve MDF pre-approvals submitted by partners.
- **MDF Program Accounts.** Used by the brand owner to manage program accounts. Here the brand owner can add credits to a program account and view monthly snapshots.
- **MDF Programs.** Used by the brand owner to set up new MDF programs, add participants, and create program accounts.

For more information about features used to manage partners, see *Siebel Partner Relationship Management Administration Guide*.

## Siebel High Tech and Industrial Manufacturing Partner Portal

The distributor or partner only needs a supported Web browser to view the Partner Portal. The High Tech and Industrial Manufacturing Partner Portal includes all the screens from the standard Siebel Partner Portal plus the following screens that are specific to the high tech and industrial manufacturing industries:

- **Design Programs.** Used by the distributor to submit design registrations and related information about the opportunity.
- **SPA Quotes.** Used by the distributor to request special pricing.
- **SPA Claims.** Used by the distributor to submit claims against special pricing requests.

- **MDF Claims.** Used by the partner to submit claims for funds from MDF programs after an approved activity has been completed.
- **MDF Pre-Approvals.** Used by the partner to create new pre-approvals to submit to the brand owner.
- **MDF Program Accounts.** Used by the partner to monitor the credits and debits allotted to them in a particular program account.

For more information about the Partner Portal, see *Siebel Partner Relationship Management Administration Guide*.

## About Modules and Options

Many Siebel Enterprise Applications modules can be purchased and used with Siebel High Tech and Industrial Manufacturing.

For information on the optional modules that can be used with Siebel High Tech and Industrial Manufacturing, contact your Siebel sales representative or local Siebel sales office.

The exact configuration of Siebel applications screens, views, and fields depends on your company's configuration of the application.

For introductory information on using the Siebel applications standard interface, see *Siebel Fundamentals*.

## Differences Between Siebel PRM and Siebel High Tech and Industrial Manufacturing

This section summarizes the most important differences between Siebel High Tech and Industrial Manufacturing documentation and Siebel Partner Relationship Management (PRM), for both the employee application and the Partner Portal.

This section is meant to be used as a supplement to the documentation for Siebel PRM, which is in *Siebel Partner Relationship Management Administration Guide*.

The key differences are:

- **Cross-references.** *Siebel Partner Relationship Management Administration Guide* often refers the reader to *Siebel Applications Administration Guide* for more information. For Siebel High Tech and Industrial Manufacturing, in addition to that book, the reader should see the other chapters of the current book.
- **The Partner Manager.** Instead of using the partner manager to work with partners, you use Siebel High Tech and Industrial Manufacturing. This product has the partner-specific functionality of Siebel Partner Manager plus this added functionality:
  - Support for complex opportunities, with the design program as the parent opportunity and the design opportunity as the child opportunity.

- Support for design registration and win.
- Support for special pricing authorization.
- **Partner Portal.** In addition the standard Partner Portal screens, the Siebel High Tech and Industrial Manufacturing Partner Portal includes the following functionality:
  - Support for complex opportunities, with the design program as the parent opportunity and the design registration as the child opportunity.
  - Support for design registration and win.
  - Support for special pricing authorization.
- **Adding New Partners.** The process of adding new partners is slightly different in Siebel High Tech and Industrial Manufacturing than in Siebel PRM, because you must specify a partner manager for the partner company. For more information, see [“About Setting Up Siebel High Tech and Industrial Manufacturing” on page 15.](#)
- **Sharing Data with Partners.** For information about sharing design programs and design registrations, see [Chapter 4, “Design Registration, Opportunity Management, and Design Win.”](#) For information about sharing SPA quotes, SPA claims, and agreements, see [Chapter 5, “Special Pricing Authorization.”](#)
- **Scenarios.** In addition to the scenarios described for Siebel PRM, Siebel High Tech and Industrial Manufacturing can be used for the scenarios described in [Chapter 4, “Design Registration, Opportunity Management, and Design Win”](#), [Chapter 5, “Special Pricing Authorization”](#), and [Chapter 6, “Market Development Funds Management.”](#)



# 3

## Getting Started with High Tech and Industrial Manufacturing

This chapter lists applications administration tasks that are specific to Siebel High Tech and Industrial Manufacturing. Use this chapter in combination with *Siebel Partner Relationship Management Administration Guide* and *Siebel Applications Administration Guide*. This chapter contains the following topics:

- [“About Setting Up Siebel High Tech and Industrial Manufacturing” on page 15](#)
- [“Administrative Setup Tasks for Siebel High Tech and Industrial Manufacturing” on page 16](#)
  - [“Making Products Eligible for Design Registration” on page 16](#)
  - [“About Setting Up Incentives to Register Design Programs” on page 17](#)
  - [“About Setting Up Email Notification of Approval of Design Registration” on page 17](#)

*Siebel Partner Relationship Management Administration Guide* and *Siebel Applications Administration Guide* cover the setup tasks that are common to Siebel Enterprise Applications, such as using license keys, defining employees, defining your company's structure, and adding partner companies. They also provide the information that you need to perform data administration and document administration tasks.

This guide assumes that you have already installed Siebel High Tech and Industrial Manufacturing. For details on setting up MDF programs, see [Chapter 6, “Market Development Funds Management.”](#)

### About Setting Up Siebel High Tech and Industrial Manufacturing

To set up Siebel High Tech and Industrial Manufacturing, follow the instructions in the following sections of *Siebel Partner Relationship Management Administration Guide*:

- **Setting Up Siebel PRM.** This section contains high-level instructions for installing, configuring, and controlling visibility.
- **Working with New Partners.** This section describes how to add partner companies and partner employees. You must add the distributor companies that will use the Partner Portal. You can add distributor company employees, or they can be added by delegated administrators at the distributor company.

**NOTE:** When you add partner companies, you must assign someone at the supplier company to be partner manager for each partner company. In *Siebel Partner Relationship Management Administration Guide*, assigning a partner manager is optional. For Siebel High Tech and Industrial Manufacturing, assigning a partner manager is required, if you want submitted design registration to be automatically assigned to the partner manager for the corresponding partner organization.

# Administrative Setup Tasks for Siebel High Tech and Industrial Manufacturing

Table 1 lists and describes the administrative setup tasks that are specific to Siebel High Tech and Industrial Manufacturing and tasks that might differ from those of the other Siebel Enterprise Applications. Table 1 also directs you to documentation that provides information about each task.

When setting up your application, use Table 1 in combination with *Siebel Partner Relationship Management Administration Guide* and *Siebel Applications Administration Guide*.

Table 1. Siebel High Tech and Industrial Manufacturing Administrative Tasks

Administrative Task	Description	For More Information
Setting Up Siebel High Tech and Industrial Manufacturing	Install, configure, add partner companies and partner employees.	<a href="#">“About Setting Up Siebel High Tech and Industrial Manufacturing” on page 15</a> <i>Siebel Partner Relationship Management Administration Guide</i> <i>Siebel Applications Administration Guide</i>
Making Products Eligible for Design Registration	Allow employees and partners to register these products.	<a href="#">“Making Products Eligible for Design Registration” on page 16</a>
Setting Up Incentives to Register Design Programs	Give distributors a discount on components after they register the design.	<a href="#">“About Setting Up Incentives to Register Design Programs” on page 17</a>
Setting Up Email Notification of Approval of Design Registration	Automatically notify distributors when design registration is approved.	<a href="#">“About Setting Up Email Notification of Approval of Design Registration” on page 17</a>

## Making Products Eligible for Design Registration

When internal salespeople or distributors begin to sell components to OEMs, they register designs using those components.

For salespeople or distributors to be able to register designs that use specific components produced by the supplier, the supplier must make those components eligible for design registration.

### *To make components eligible for design registration*

- 1 Navigate to the Administration - Product screen > Products view.
- 2 Query for the product you want to make eligible and drill down on the product name.
- 3 Click the More Info view tab and then select the Design Registration Eligible check box.



## About Setting Up Incentives to Register Design Programs

Distributors use Siebel High Tech and Industrial Manufacturing to register design programs, so they are protected from competition while they are collaborating with the OEM to get this component designed into the product.

To protect distributors from competition, it is essential to set up a design registration program that gives distributors with registrations financial incentives when they win designs. Typically, suppliers give distributors a discount on components they sell to OEMs for products where their registrations have been approved. Other distributors would not get this discount, so they would not be able to compete with the distributor holding the registration in selling components for these products.

The incentive is usually given in the form of a special pricing authorization that gives the distributor a fixed discount on the book price of the component.

Using Siebel Tools, you can configure Siebel High Tech and Industrial Manufacturing to generate a special pricing authorization when the value in the Status field of a design registration record is set to *Win*. This SPA would give the distributor a set discount from the book price, which the distributor can claim as sales come through.

For more information about special pricing authorizations, see [Chapter 5, "Special Pricing Authorization."](#)

For more information about using Siebel Tools to configure Siebel High Tech and Industrial Manufacturing, see *Configuring Siebel Business Applications*.

## About Setting Up Email Notification of Approval of Design Registration

After submitting a design registration, distributors check the Partner Portal to see if it has been approved.

Likewise, after submitting a design opportunity, internal salespeople check Siebel High Tech and Industrial Manufacturing to see if it has been approved.

You can set up a workflow so that the product automatically notifies distributors and internal salespeople when the status of a design registration or design opportunity is set to Approved or to Rejected.

For information on creating workflows, see *Siebel Business Process Designer Administration Guide*.



# 4

## Design Registration, Opportunity Management, and Design Win

This chapter includes the following topics:

- “Overview of Design Registration, Opportunity Management, and Design Win” on page 19
- “Scenario for Design Registration and Win” on page 20
- “Process of Distributor Selling Components to OEM” on page 21
  - “Submitting a Registration for a Design Program (Distributor)” on page 21
  - “Reviewing and Approving the Registration (Supplier)” on page 24
  - “Checking Whether a Registration Request was Approved (Distributor)” on page 25
  - “Entering a Design Win or Loss (Distributor)” on page 25
  - “Submitting Point-of-Sales Data (Distributor)” on page 26
  - “Tracking Sales (Supplier)” on page 27
  - “Viewing Point-Of-Sales Data for a Design Program (Distributor)” on page 27
- “Process of Internal Salesperson Selling Components to OEM” on page 28
  - “Submitting a Design Opportunity” on page 28
  - “Approving the Design Opportunity” on page 29
  - “Verifying Whether a Registration Request was Approved” on page 30
  - “Entering a Design Win or Loss” on page 30
  - “Tracking Design Opportunities” on page 31

### Overview of Design Registration, Opportunity Management, and Design Win

Selling components to OEMs requires spending a substantial amount of time on design collaboration.

For example, a distributor or internal salesperson may discover that a computer manufacturer is planning to produce a new server that might be able to use one of the chips used by the component supplier. The distributor or salesperson will spend months collaborating with the OEM so that the OEM ultimately selects the supplier’s chip for the server.

Distributors have their own sales engineers or work with design houses to develop solutions for the OEM’s products. Internal salespeople work with application engineers at the component supplier company.

To protect themselves from competition during this long design period, distributors use Siebel High Tech and Industrial Manufacturing to register designs, as follows:

- The distributor or salesperson submits a registration to develop a design with a specific component for a specific product planned by the OEM.
- The component supplier decides whether to approve this registration.
- If the registration is approved, other distributors will not get financial incentives from the component supplier, so they will generally not compete in developing designs for this product that use this component.
- After registration, the distributor can use Siebel High Tech and Industrial Manufacturing Partner Portal to manage the opportunity, keeping track of revenues and contacts associated with it and of contract manufacturers who will ultimately build the OEM's product.
- If the distributor does the necessary design work and successfully convinces the OEM to use this component in this product, then the distributor uses Siebel High Tech and Industrial Manufacturing to update the status of the design registration to Design Win.

Internal salespeople can also use Siebel High Tech and Industrial Manufacturing to manage opportunities.

For more information about how distributors use Siebel High Tech and Industrial Manufacturing, see [“Process of Distributor Selling Components to OEM” on page 21](#).

For more information about how internal salespeople use Siebel High Tech and Industrial Manufacturing, see [“Process of Internal Salesperson Selling Components to OEM” on page 28](#).

## Scenario for Design Registration and Win

This scenario gives one example of how design registrations may be used. You may use design registrations differently, depending on your business model.

A distributor who sells components to computer manufacturers often works with a component supplier who manufactures microprocessors. This component supplier uses Siebel High Tech and Industrial Manufacturing.

While meeting with a computer manufacturer, the distributor learns that the computer manufacturer plans to produce a new server that might be able to use a processor produced by the component supplier.

The distributor wants to work on selling this component to the computer manufacturer, and so the distributor uses the Partner Portal to submit a registration for this design.

The design registration administrator at the component supplier approves this distributor's design registration.

Looking at the Status field in the Partner Portal, the distributor sees that this registration has been approved and begins collaborating with the computer manufacturer to get the microprocessor designed into the product.

After many months of work, the computer manufacturer develops a design for this new server that includes the processor produced by the component supplier. In the Partner Portal, the distributor changes the status of the opportunity to *Design Win*.

**NOTE:** If the distributor must charge a price that would compromise its profit margin in order to keep the computer manufacturer's business, the distributor can enter a request to sell the component at a lower price. For more information, see [Chapter 5, "Special Pricing Authorization."](#)

The distributor submits point-of-sales data to the supplier periodically. The distributor can enter this information in the Partner Portal, but it is more common to provide the information through EDI (Electronic Data Interchange) or files of different formats.

The supplier brings this information into the Siebel application using an integration process from an ERP system. Alternatively, if the distributor supplies the information through EDI or other file formats, the supplier can import it using an integration process from a legacy application.

## Process of Distributor Selling Components to OEM

Using Siebel High Tech and Industrial Manufacturing, distributors sell the supplier's products using the following process:

- ["Submitting a Registration for a Design Program \(Distributor\)" on page 21](#)
- ["Reviewing and Approving the Registration \(Supplier\)" on page 24](#)
- ["Checking Whether a Registration Request was Approved \(Distributor\)" on page 25](#)
- ["Entering a Design Win or Loss \(Distributor\)" on page 25](#)
- ["Submitting Point-of-Sales Data \(Distributor\)" on page 26](#)
- ["Tracking Sales \(Supplier\)" on page 27](#)
- ["Viewing Point-Of-Sales Data for a Design Program \(Distributor\)" on page 27](#)

### Submitting a Registration for a Design Program (Distributor)

The distributor begins by meeting with an OEM to determine whether one of the supplier's components would be appropriate for one of the OEM's design programs and to determine projected sales for the planned product and prices for the component.

When the distributor finds a product that can use one of the supplier's components, the distributor attempts to register it. Registration protects distributors from competition during the period when they are collaborating with the OEM to get this component designed into the product. Typically, distributors are given a discount on components if they register the design and win the design. Other distributors would not get this discount, so they would not be able to offer the same low prices as the distributor holding the registration.

This task is part of ["Process of Distributor Selling Components to OEM" on page 21](#).

To submit the registration through the Partner Portal, the distributor must enter:

- **Design Program.** The design program record refers to the product that the component will be used in. For example, it might refer to a new server that the OEM is planning to produce.
- **Design Registration.** The design registration record refers to the component used in the program. For example, it might refer to a chip that the distributor thinks can be used in the server.

There can be multiple design registration records for one design program record. For example, the distributors may want to use several different chips made by the supplier in one product that is planned by the OEM.

### ***To submit a registration through the Partner Portal***

- 1 In the Partner Portal, navigate to the Design Programs screen.
- 2 Select an existing design program for which you want to register a new part, or create a new design programs record.
- 3 Drill down on the design programs record, click the More Info tab, and enter information about the program. Some fields are described in the following table.

Field	Comments
Last Name	Enter the last name for the contact at the end-customer company.
Potential Value	Displays the roll-up of the potential value for all child design registrations or opportunities.
Prototype Date	Enter the start date for building of the prototype for the OEM product.
Production Date	Enter the start date for production of the OEM product.
Market	Enter the market that the OEM product belongs to.

- 4 Click the Program Team view tab and add employees who will be working on this program to the Program Team list.  
Anyone who is on the program team will be able to view this design programs record and the associated information.
- 5 Click the Design Registrations tab and create a new design registrations record.

- 6 Select Design Opportunity Details from the drop-down list to the right of the Query button, and enter information about this opportunity to use a specific component produced by the supplier in this product.

Field	Comments
Potential Value	Displays the aggregation of revenues for all selected parts under Revenues.
Assigned To	Displays the manufacturer employee assigned to review the design registration. It is automatically set to the partner manager for this distributor as the first reviewer.
Field Application Engineer	Enter the name of the field application engineer (FAE) assigned to the design registration. This FAE automatically becomes a member of the sales team.
Sales Engineer	Enter the name of the sales engineer (SE) assigned to the design registration. This SE automatically becomes a member of the sales team.
Rep Firm	Enter the account name of the manufacturer representative working the opportunity.
Inside Sales Rep	Automatically filled out with the partner manager for this distributor.
Submitted Date	Displays the date the registration was submitted by the distributor or sales representative.
Renewal Date	Displays the date the registration needs to be renewed by the supplier.
Approved/Rejected Date	Displays the date the status of the registration was set to Approved or Rejected.

- 7 In the Revenues view, beneath the Design Registrations list, enter a projected sales quantity and price. Some fields are described in the following table.

Field	Comments
Selected	Identifies the part selected from a list of competing parts for the given socket.
Registered	Selected by the manufacturer to indicate to the distributor that the part is registered on distributor's behalf.

- 8 Click the Contacts view tab and add more information about the contacts at the OEM.
- 9 Click the Contract Manufacturers view tab and add information about the contract manufacturers who will produce the OEM's product.

Contract manufacturer information is useful to track where the sales for this opportunity will come from.

**10** In the design registrations form, in the Status field, select Submitted.

The registration request is submitted to the supplier for approval. The revenue records become read-only. The Inside Sales Rep field is set to the partner manager for this distributor at the supplier company, so the registration is automatically assigned to that partner manager.

**NOTE:** If the distributor wants to make any changes to this design registration data, the distributor can select Recalled in the Status field to recall the submission.

## Reviewing and Approving the Registration (Supplier)

The supplier's design registration administrator reviews registrations that have been submitted. The information that the distributor entered in the Design Registrations view of the Partner Portal is displayed in the Design Opportunities view of Siebel High Tech and Industrial Manufacturing.

This task is part of "[Process of Distributor Selling Components to OEM](#)" on page 21.

### *To review and approve registration for a program*

- 1** Navigate to the Administration - Design Opportunities screen.
- 2** Query to find all design registrations that have a status of Submitted.
- 3** To approve any registrations, select Approved in the Status field.
- 4** If the supplier needs more information before approving the registration:
  - a** Select Pending in the Status field while investigating whether to approve the program.
  - b** In the Design Opportunities list, drill down on the Registration ID of the record that should be reviewed.

The Design Programs screen appears.
  - c** In the Design Opportunities list, locate and select the record for this design opportunity.
  - d** Click the view tabs under the Design Opportunities list to view information that the distributor entered about the design registration, such as projected sales and revenue.
  - e** Click the All OEM Design Opportunities tab to see if any other distributors have submitted or approved registrations with this OEM.
  - f** (Optional). Click the Sales Team view tab and add other employees to the sales team, to give them visibility to this registration.
  - g** After doing all needed research and deciding whether to approve the registration, change the value in the Status field of the design opportunity record to Approved or Rejected.
  - h** If the registration was rejected, select Design Opportunity Details from the drop-down list to the right of the Query button, and then enter the reason for the rejection in the Rejection Reason field.



## Checking Whether a Registration Request was Approved (Distributor)

After submitting a registration request, the distributor can check whether the registration was approved by looking at the Status field of the design registration record in the Partner Portal.

**NOTE:** You can also set up Siebel High Tech and Industrial Manufacturing so distributors are automatically notified by email when a registration request is approved or rejected. For more information, see [“About Setting Up Email Notification of Approval of Design Registration”](#) on page 17.

This task is part of [“Process of Distributor Selling Components to OEM”](#) on page 21.

### *To check whether a registration request was approved*

- 1 In the Partner Portal, navigate to the Design Programs screen.
- 2 Drill down on the design program record that this registration is attached to.  
The Design Registrations view appears.
- 3 Locate the record for the registration and verify the value in the Status field.  
Select Design Opportunity Details from the drop-down list to the right of the Query button to view the approval or rejection date, which was automatically entered when the supplier changed the status to Approved or Rejected. If the supplier entered a rejection reason, the distributor can view the reason in the Partner Portal.

## Entering a Design Win or Loss (Distributor)

After the registration is approved, the distributor does detailed design work for the program, usually working with a design house.

If the OEM selects the supplier's component, the distributor enters a design win, indicating that they have successfully sold the supplier's components to the OEM.

If the OEM rejects the design, the distributor enters a design loss.

This task is part of [“Process of Distributor Selling Components to OEM”](#) on page 21.

### *To enter a design win or loss*

- 1 In the Partner Portal, navigate to the Design Programs screen.
- 2 In the Design Programs list, drill down on the record for the program where there has been a design win or loss.
- 3 In the Design Registrations list, from the Status field of the record for the registration:
  - Select Win if there has been a design win.
  - Select Dead if there has been a design loss.
- 4 Click Save.

## Submitting Point-of-Sales Data (Distributor)

Distributors submit point-of-sales data periodically, usually once a month. This data lists the total quantity and price of each of the manufacturers' components that they have sold during the period, the accounts the components were sold to, the shipping dates, and the resale prices.

Distributors can enter this information through the Partner Portal, but they will probably enter it in a legacy application and submit it in some other format.

The point-of-sales data should have the following format:

- A report header, with information about the distributor sending the report.
- Multiple line items, one line item for each sale the distributor has made to an OEM for the supplier.

After importing this information, the supplier can view it in the Design Programs screen > Design Opportunities > POS Orders view in the Siebel High Tech and Industrial Manufacturing employee application.

In the POS Orders view, the line items contain the fields listed in [Table 2 on page 26](#). Distributors should submit reports with the data needed to populate these fields.

Table 2. Fields in the POS Orders view

Field	Comments
Sequence	Parent organization for the distributor.
End Customer	Account name for OEM.
Part #	A part number, such as global product identifier or manufacturer part number.
Shipped Quantity	Quantity shipped by the distributor.
Distributor Credit Amount	Amount of credit requested by the distributor.
Transaction Status	Processing status of the POS order.
Branch Office	Organization for the distributor.
Deviation	Difference between the amount submitted by the distributor on the claim and the amount originally agreed upon per the entitlement.
Authorized Credit Amount	Amount of credit authorized by the manufacturer to the distributor.
SPA Entitlement #	Entitlement number under the agreement generated when the quote is approved. This number is required for reimbursement of claims.
Ship Date	Distributor ship date to OEM.
Resale Price	Resale price per distributor.

### *To submit point-of-sales data*

- Enter this data through the Partner Portal or provide it in a spreadsheet, a text file, or an EDI message.

## Tracking Sales (Supplier)

The supplier imports the point-of-sales data submitted by the distributor using Siebel Enterprise Application Integration (Siebel EAI).

After it is imported, the supplier can view this data, which is used as the basis for compensating the supplier.

These tasks are part of [“Process of Distributor Selling Components to OEM” on page 21](#).

### *To import the data using Siebel eAI*

- See *Integration Platform Technologies: Siebel Enterprise Application Integration*.

### *To view point-of-sales data for a component*

- 1 Navigate to the Design Programs screen.
- 2 In the Design Programs list, drill down on the record for the design program where the component is being used.
- 3 In the Design Opportunities view, select the record for the design opportunity that represents this component and choose Design Opportunity Details from the drop-down list to the right of the Query button.
- 4 Click the POS Orders view tab beneath the Design Opportunities view.

Transactions for this component are displayed.

## Viewing Point-Of-Sales Data for a Design Program (Distributor)

Distributors generally do not submit point-of-sales data using the Partner Portal. They submit this data using a spreadsheet, a text file, or an EDI message, and the supplier imports it into the Siebel application.

However, distributors can view the imported point-of-sales data using the Partner Portal to get an overview of all their sales of a component.

**NOTE:** If the distributor does not provide sales data that includes the Registration ID, then the point-of-sales data will be visible in the POS Orders view of the Partner Portal, but it will not be associated with the programs that the parts were sold under.

This task is part of [“Process of Distributor Selling Components to OEM” on page 21](#).

### *To view point-of-sales data for a component*

- 1 In the Partner Portal, navigate to the Design Programs screen.
- 2 In the Design Programs list, drill down on the record for the design program where the component is being used.
- 3 In the Design Registrations view, select the record for the design registration that represents this component.
- 4 Click the POS Orders view tab beneath the Design Registrations view.  
Transactions for this component are displayed.

## Process of Internal Salesperson Selling Components to OEM

In addition to using distributors at partner companies that sell components to OEMs, component suppliers often have their own sales force, supported by a team of internal Field Application Engineers (FAEs), to sell to strategic OEMs.

You can track opportunities submitted by internal salespeople using the following process:

- [“Submitting a Design Opportunity” on page 28](#)
- [“Approving the Design Opportunity” on page 29](#)
- [“Verifying Whether a Registration Request was Approved” on page 30](#)
- [“Entering a Design Win or Loss” on page 30](#)
- [“Tracking Design Opportunities” on page 31](#)

## Submitting a Design Opportunity

After internal salespeople meet with OEMs and identify opportunities to sell components, they submit a design opportunity using Siebel High Tech and Industrial Manufacturing.

This task is part of [“Process of Internal Salesperson Selling Components to OEM” on page 28](#).

To submit an opportunity, the salesperson must enter:

- **Design Program.** The design program record refers to the product that the component will be used in. For example, it might refer to a new server that the OEM is planning to produce.
- **Design Opportunity.** The design opportunity record refers to the component used in the program. For example, it might refer to a chip that the salesperson thinks can be used in the server.

There can be multiple design opportunity records for one design program record. For example, the salesperson may want to use several different chips made by the supplier in one product that is planned by the OEM.

### *To submit a design opportunity*

- 1 Navigate to the Design Programs screen.
- 2 Create a new design programs record and drill down on it to enter general information about the program.
- 3 Click the More Info tab to enter further information about the program.
- 4 Click the Program Team view tab and add employees who will be working on this program.  
Anyone who is on the Program Team will be able to view this design programs record and the associated information.
- 5 Click the Design Opportunities tab and create a new Design Opportunities record.
- 6 Select Design Opportunity Details from the drop-down list to the right of the Query button, and enter information about the opportunity to use a specific component produced by the supplier in this product.
- 7 Click the Revenues view tab, beneath the Design Opportunities list, to add information about projected sales and projected prices.
- 8 Click the Contacts view tab to add more information about the contact at the OEM.
- 9 In the design opportunities form, from the Status field, select Submitted.  
The registration request is submitted for approval.

**NOTE:** If the salesperson wants to make any changes in this design opportunity data, the salesperson can select Recalled from the Status field to recall the submission.

## **Approving the Design Opportunity**

Registrations by internal salespeople are reviewed to make sure the salesperson is pursuing a worthwhile opportunity and not misallocating the company's resources on a design that should not be pursued.

This task is part of "[Process of Internal Salesperson Selling Components to OEM](#)" on page 28.

### *To review and approve a design opportunity*

- 1 Navigate to the Administration - Design Opportunities screen.
- 2 Use a query to find all design opportunities that have a status of Submitted.
- 3 To approve any of these opportunities, select Approved from the Status field.

## Verifying Whether a Registration Request was Approved

After submitting a design opportunity, the salesperson can verify whether it was approved by looking at the Status field.

**NOTE:** You can also set up Siebel High Tech and Industrial Manufacturing so salespeople are automatically notified by email when a design opportunity is approved or rejected. For more information, see [“About Setting Up Email Notification of Approval of Design Registration” on page 17](#).

**NOTE:** If your company does not use a design opportunity registration process for internal sales representatives, you can disable this process by modifying the state model on Design registrations. For more information about the state model, see *Siebel Applications Administration Guide*.

This task is part of [“Process of Internal Salesperson Selling Components to OEM” on page 28](#).

### *To check whether a design opportunity was approved*

- 1 Navigate to the Design Programs screen.
- 2 Drill down on the design programs record that this design opportunity is attached to.  
The Design Opportunities view appears.
- 3 Locate the record for the opportunity and verify the value in the Status field.
- 4 Select Design Opportunity Details from the drop-down list to the right of the Query button to view the approval or rejection date, which was automatically entered when the supplier changed the status to Approved or Rejected.

## Entering a Design Win or Loss

After the opportunity is approved, the salesperson collaborates with the OEM to incorporate this component into the design of the product, usually working with a team of FAEs in the supplier company.

If the OEM accepts the design that this team develops, the salesperson enters a design win.

If the OEM rejects the design, the salesperson enters a design loss.

This task is part of [“Process of Internal Salesperson Selling Components to OEM” on page 28](#).

### *To enter a design win or loss*

- 1 Navigate to the Design Programs screen.
- 2 In the Design Programs list, drill down on the record for the program where there has been a design win or loss.
- 3 In the Design Opportunities list, from the Status field of the record for the registration:
  - Choose Win if there has been a design win.

- Choose Dead if there has been a design loss.

## Tracking Design Opportunities

Design opportunities are based on the same opportunity management framework used in other Siebel applications, so you can work with them using the same functionality that you use to work with other opportunities.

This task is part of [“Process of Internal Salesperson Selling Components to OEM”](#) on page 28.

### *To track design opportunities*

- You can use Siebel Forecasting to keep track of the design opportunity pipeline. For more information, see *Siebel Forecasting Guide*.





# 5

## Special Pricing Authorization

This chapter describes how to set up and use Special Pricing Authorization (SPA) in Oracle's Siebel High Tech and Industrial Manufacturing. It includes the following topics:

- "Scenario for Special Pricing Authorization" on page 33
- "Process of SPA Quote and Claim Management" on page 34
  - "Submitting an SPA Quote (Distributor)" on page 34
  - "Reviewing and Approving SPA Quotes (Supplier)" on page 36
  - "Submitting an SPA Claim (Distributor)" on page 37
  - "Validating an SPA Claim (Supplier)" on page 40

### Overview of Special Pricing Authorization

SPA (also referred to as Ship from Stock and Debit or Distributor Margin Management) is a collection of quote and claim processes designed to promote margin protection for the distributor. SPA includes the following two modules:

- Special Pricing Authorization Management
- Special Pricing Claims Management

There are a number of conditions that drive an SPA request:

- **Competitive pricing.** The distributor asks the supplier for lower, off-book pricing, to meet a specific competitive transaction. The off-book pricing is valid only for that unique end customer opportunity.
- **Supplier book price reductions.** When a supplier lowers book prices due to shifts in the overall market, the distributor requests a credit for the difference for any inventory or future purchases in order to maintain a reasonable margin.

### Scenario for Special Pricing Authorization

This scenario gives one example of how SPAs may be used. You may use SPAs differently, depending on your business model.

A distributor purchased components from a supplier for a book price of \$10 apiece with the expectation that they would be resold at \$12 apiece and the distributor would realize \$2 in margin.

Market prices for the components have come down to \$11 apiece. The distributor now has an opportunity to sell the components at the current market price of \$11 apiece. In order to still realize the expected \$2 per piece margin, the distributor submits an SPA quote to the supplier, requesting a special pricing authorization. The supplier approves the request which generates a corresponding pricing agreement. The agreement defines the terms of the approved quote with a set duration.

The distributor then resells the components at \$11 apiece. Using the Partner Portal of Siebel High Tech and Industrial Manufacturing, the distributor submits an SPA claim against the agreement, along with supporting point-of-sales (POS) or sales-out transaction data to the supplier as proof of sale. Once the claim is validated by the supplier, a refund or credit of \$1 for each component sold is issued to the distributor.

## Process of SPA Quote and Claim Management

SPA quotes and claims are submitted and managed by the distributor and supplier using the following processes:

- 1 [“Submitting an SPA Quote \(Distributor\)” on page 34](#)
- 2 [“Reviewing and Approving SPA Quotes \(Supplier\)” on page 36](#)
- 3 [“Submitting an SPA Claim \(Distributor\)” on page 37](#)
- 4 [“Validating an SPA Claim \(Supplier\)” on page 40](#)

### Submitting an SPA Quote (Distributor)

Distributors submit SPA quotes through the Partner Portal or using EDI. Quote information can be imported from external systems into Siebel High Tech and Industrial Manufacturing by using Siebel eAI. For more information about Siebel EAI, see *Integration Platform Technologies: Siebel Enterprise Application Integration*.

An SPA quote may contain multiple line items and every line item represents a special pricing request for individual components. The distributor must first create and save the SPA quote before adding line items to it. Once the quote is complete, the distributor submits it to the supplier.

This task is part of [“Process of SPA Quote and Claim Management” on page 34](#).

#### *To create an SPA quote through the Partner Portal*

- 1 In the Partner Portal, navigate to the SPA Quotes screen.

- In the form beneath the SPA Quotes list, click New to create an SPA quote, and enter information about the quote. Some fields are described in the following table.

Field	Comments
Registration ID	Approved design registration that is associated with the components in question.
End Customer	OEM manufacturer in whose end products the components will be used.
Resale Customer	Resale customer is the customer actually buying the part. It is often a contract manufacturer. A contract manufacturer produces the final, finished product on behalf of an OEM manufacturer (end customer).
Total Exposure	Sum of all Total Line Item Cost field values for all approved line items.
Last Name	Contact at distributor organization. This field is auto-populated with the login name, or it can be modified.

- Click Save.
- Drill down on the new SPA quote and create a new record in the Line Item Detail form beneath the Line Items list.
- Enter information about the line item. Some fields are described in the following table.

Field	Comments
Product	Component for which the distributor is requesting special pricing.
Quantity	Total number of units for which the distributor is requesting special pricing.
Competitor Name	Name of the competitor for the component listed in the line item.
Competitor Product	Name of the competitive product.
Competitor Part Price	Price of the competitive product.
Purchase Cost	Price the distributor originally paid to purchase the components.
Requested Cost	Special (reduced) pricing that the distributor is requesting.
Authorized Cost	Cost authorized by the supplier.
Book Cost	Price at which the component was originally sold to the distributor by manufacturer.
MSRP	The manufacturer's suggested retail price.
Requested Resale Price	Resale price at which the distributor wishes to sell the components.
Suggested Resale Price	Resale price suggested by the manufacturer.
Total Line Item Cost	Quantity of the line item multiplied by the difference between the authorized and requested costs.

### *To submit an SPA quote*

- 1 In the Partner Portal, navigate to the SPA Quotes screen and select an SPA quote of status In Progress.
- 2 Set the status to Submitted and click Save.

The SPA quote is automatically assigned to the partner manager responsible for the given distributor. For information on how to set up the partner manager, please see [“About Setting Up Siebel High Tech and Industrial Manufacturing” on page 15](#) and *Siebel Partner Relationship Management Administration Guide*.

**NOTE:** The Line Items view for the SPA quote becomes read-only. To enter or change line items, set the status to Recalled and click Save. The line items can then be modified.

## Reviewing and Approving SPA Quotes (Supplier)

When the supplier receives an SPA quote request, the regional sales manager or sales operations manager reviews it, evaluating the individual line items, comparing it to similar quotes received for the same end customer (OEM manufacturer), and finally either approves or rejects the quote.

An approved quote automatically creates a pricing agreement. For more information about agreements, see *Siebel Field Service Guide*. The agreement is created by the HTIM SPA Quote Approval workflow process. For more information about the workflow process, see [Chapter 7, “Workflows for High Tech and Industrial Manufacturing.”](#)

This task is part of [“Process of SPA Quote and Claim Management” on page 34](#).

### *To review and approve or reject a pending SPA quote*

- 1 Navigate to the SPA Quotes screen.
- 2 In the SPA Quotes list, drill down on an SPA quote of status Submitted.
- 3 Review the line items for the selected SPA quote. For each line item:
  - Modify the Authorized Cost field as needed.
  - Modify the Suggested Resale Price field as needed.
  - Set the status as appropriate. Each individual line item must be reviewed before the entire SPA quote can be approved.
- 4 Click the Similar Quotes view tab to see other SPA quotes for the same end customer (the OEM manufacturer of the finished goods for which the line item is to be used).
- 5 Review the listed quotes to verify pricing on similar parts for the same end customer in order to maintain pricing integrity across quotes.
- 6 In the SPA quote form, set status to Approved or Rejected as appropriate.

Setting the status to Approved initiates the HTIM SPA Quote Approval workflow process and generates the agreement.

**To review an agreement for an SPA quote**

- 1 Navigate to the SPA Quotes All Quotes Across Organizations view.
- 2 Drill down on an SPA quote of status Approved.
- 3 Click the Agreement view tab to see the agreement generated for the SPA quote.
- 4 Drill down on the agreement name for more information on the agreement.

The Entitlements - Price Details view appears. Some of the fields in the Price Details list are described in the following table.

Field	Comments
Balance Quantity	Number of parts not yet claimed through the SPA claim process. Value automatically decreases by quantity of each approved SPA claim.
Approved Quantity	Number of parts quoted in the approved SPA.
Purchase Cost	Price at which the distributor purchased the parts.
Suggested Resale Price	Price suggested by the distributor; protects against excessive margins.
Authorized Cost	Agreed upon reduced purchase cost from the SPA quote.

**NOTE:** The agreement entitlement is valid for three months starting from the day of approval. The time period can be changed by modifying the QUOTE\_EXPIRATION\_PERIOD LOV. See *Siebel eSales Administration Guide* for details on how to set quote expiration dates.

## Submitting an SPA Claim (Distributor)

SPA claims are distributor requests for reimbursement for lost margin. Once SPA quotes have been approved by the supplier and an agreement with SPA approved pricing entitlements is generated, the distributor can submit SPA claims against the entitlement.

Distributors can submit claims through the Partner Portal. Claim data can also be imported from external systems into Siebel High Tech and Industrial Manufacturing by using Siebel eAI. For more information about Siebel EAI, see *Integration Platform Technologies: Siebel Enterprise Application Integration*.

### Point-of Sales and SPA Reports

SPA claims are submitted by the distributor as line items in an SPA report. Point-of-sales (POS) and SPA reports are directly related. Both reports contain multiple line items grouped together for transmission purposes only. Each line item describes a different sales transaction with an end customer. SPA reports contain line items identified as *claims*. The *claims* are transactions for which the distributor wants to be credited. Each claim line item must be verified against the appropriate entitlement by the supplier.

POS reports are used:

- By the distributor to report sell-through data to the supplier.
- By the supplier to track end customer sales, which is useful for marketing and incentive compensation purposes.
- By the supplier to estimate sell-through volumes for design registrations, which is useful to see how sales compare with the sales goals in the design registrations, and to increase the accountability of the sales reps.

SPA reports are used:

- To substantiate SPA claim line items. After distributors submit claims for lost margin to the manufacturer, the SPA report gives the manufacturer proof of the end customer purchase volumes, which are used to generate credits for the distributor when prices are lower than the guaranteed margin. For more information, see [“Submitting an SPA Claim \(Distributor\)” on page 37](#) and [“Validating an SPA Claim \(Supplier\).”](#)

The distributor must first create and save the SPA report record before adding line items to it.

This task is part of [“Process of SPA Quote and Claim Management” on page 34.](#)

***To create an SPA claim through the Partner Portal***

- 1 In the Partner Portal, navigate to the SPA Claims screen.
- 2 In the form beneath the POS/SPA Reports list, create a new SPA report record, and enter information about the report. Some fields are described in the following table.

**NOTE:** Some of the following fields can only be seen after you save and drill down on the record.

Field	Comments
Distributor Report ID	Report identifier for the distributor.
Mfg Report ID	Report identifier for the manufacturer.
Type	Distinguishes between POS and SPA Claim reports.
Distributor	Read-only name of distributor company, the parent organization of the current login.
Debit Note #	Typically, a number that comes from the supplier’s accounting system. After the claim is approved, the accounting system generates a debit/credit note for payment to the distributor.
Claim Cost	The total value of the approved line items on a validated claim. This is the cost of the claim to the supplier and the size of the credit to the distributor.
Currency Code	Currency for overall Claim/POS report, if not specified at line item.
Exchange Date	Currency conversion date. Used to identify internal currency conversion table.

- 3 Click Save.

- 4 Drill down on the SPA record and create a new line item record in the Line Item Detail form.
- 5 Enter information about the line item. Some fields are described in the following table.

Field	Comments
SPA Entitlement #	Pick list of approved and active SPA entitlements for the distributor.
Branch Office	Distributor's branch office, primary organization of the current login.
End Customer	Account of the OEM into whose products the product identified on the line item is built.
End Customer Address	Address for the OEM account (end customer).
Resale Customer/Address	Account address to which the parts were sold and delivered.
Resaler Address	Account address to which the parts were sold and delivered.
Ship To Customer	Account to which the product identified on the line item was shipped.
Ship To Address	Account address to which the product identified on the line item was shipped.
Product	Manufacturer's product sold.
GTIN#	Global product identifier. A unique reference number for the manufacturer's product.
Shipped Quantity	Quantity shipped by distributor to end customer.
Ship Date	Distributor ship date to end customer.
Design Registration #	ID of the design registration under which this transaction was executed.
Transaction Status	Status of the individual line item.
Deviation	Difference between the amount submitted by the distributor on the claim and the amount originally agreed upon per the entitlement. Sometimes the authorized price/purchase cost submitted on the claim will differ from the values specified on the entitlement, leading to a non-zero deviation.

***To submit an SPA Claim report***

- 1 In the Partner Portal, navigate to the SPA Claims screen and select an SPA quote of status In Progress.
- 2 Set the status to Submitted and click Save.

The Line Items view for the SPA Claim becomes read-only.

## Validating an SPA Claim (Supplier)

This task is part of [“Process of SPA Quote and Claim Management”](#) on page 34.

### *To validate an SPA Claim*

- 1 Navigate to the SPA Claims screen and select an SPA report of status Submitted.
- 2 Click Validate.

This triggers the workflow process HTIM Validate Claim Items and the Claim Status updates according to the results of the workflow. For more information about the workflow process, see [Chapter 7, “Workflows for High Tech and Industrial Manufacturing.”](#)

On the form beneath the SPA Claims list, the Claim Cost field shows the aggregate value of all approved claim line items.

- 3 Drill down on the report to review the transaction status of the individual line items associated with the SPA report claim.



# 6

## Market Development Funds Management

This chapter includes the following topics:

- [“Overview of MDF Management” on page 41](#)
- [“Key Features of MDF Management” on page 42](#)
- [“Scenario for MDF Management” on page 43](#)
- [“Process of Setting Up MDF Programs” on page 43](#)
  - [“Creating MDF Snapshot Periods” on page 44](#)
  - [“Making Accounts Eligible for MDF Participation” on page 44](#)
  - [“Enabling the HTIM MDF Period Ending Process Workflow” on page 45](#)
  - [“Setting Up MDF Approval Authority Limits” on page 45](#)
- [“Creating an MDF Program and Program Account” on page 45](#)
- [“Setting Up a Program Account’s First Snapshot” on page 46](#)
- [“Removing a Participant From an MDF Program” on page 47](#)
- [“Adding a Credit to a Program Account” on page 47](#)
- [“Creating a Pre-Approval” on page 48](#)
- [“Reviewing a Pre-Approval” on page 50](#)
- [“Creating a Claim” on page 51](#)
- [“Reviewing a Claim” on page 52](#)

### Overview of MDF Management

In a typical MDF or co-op management process, the marketing manager sets up one or several programs and selects partners who can participate in the associated funds. This automatically creates program accounts for these partner participants so that partners can accrue funds or receive discretionary MDF amounts under the associated programs. Partners can request funding for marketing activities out of the funds accrued or received in their different program accounts. Partners request funding through the Partner Portal by creating a pre-approval with one or more associated line items, identifying the different cost items associated with the marketing activity. These pre-approvals are routed to the channel marketing manager, who can review and either accept or reject cost items at the line item level. Once approved, the partner can execute the corresponding marketing activity.

Partners can create claims through the Partner Portal to redeem the money in their program accounts for marketing activities against the pre-approvals. When a claim is approved, the claim debits the program account. The claim amount can then be sent to the accounting system for payment processing. This process includes flexibility for routing and escalating approval requests to multiple people within brand owner organizations.

## Key Features of MDF Management

- **Program Management.** Programs provide the brand owner with the ability to make marketing funds available to partners automatically. The brand owner can define a program, with specific characteristics, such as activation date, expiration date, eligible partners, target markets, target products, fund accrual rules and so on. After the participating partners are identified, the system automatically generates all the program accounts for the participating partners. A pool of money made available to partners for the organization of marketing activities. For example, campaigns or events.
  - **Co-Op Program.** A program under which the partner accrues credits based on performance. The co-op program is also known as an accrual fund. For example, resellers could accrue 2% of all product revenue into their account set up under this program.
  - **MDF Program.** A program under which the partner receives discretionary funding from the brand owner. This is a non-performance based program. It is also known as a fixed fund. For example, after approval, this money could be spent on marketing activities for a specific product promotion.
- **Program Participant.** The account or organization participating in the program. For participating, the partner will receive a program account for accrual of funds according to the program rules. This is temporary data used in selecting the partners that can be used for a program account.

**NOTE:** Participants can only be selected from accounts with the Fund Eligible check box selected. This field can be exposed in the Accounts screen on the list applet.
- **Program Account.** The individual account associated with the partner. Program accounts are child funds of the program. The partner accrues funds in a program account according to the program rules or the Channel Account Manager deposits discretionary amounts of money into the program account. Each partner can have multiple program accounts, one for each program the partner is participating in. Each partner can only participate in the same program once.
- **Credit.** A child of the program account used to represent the crediting of money to a particular program account. Credits are created manually.
- **Pre-Approval.** Request for funds. Partners request funding for marketing activities out of the funds accrued in their different program accounts. A pre-approval can be associated with only one program account.
- **Claim.** Request for payment against a pre-approval after a marketing activity has been executed. Claims go through an approval process at the brand owner's company. Claims are created against a specific pre-approval. When the claim is approved, the claim debits the program account defined for the associated program account.
- **Debit.** Debits are read-only and created automatically only after a claim line item is approved.

## Scenario for MDF Management

This scenario gives one example of how MDFs may be used. You may use MDFs differently, depending on your business model.

A program manager at the brand owner company is responsible for collaborative marketing with partners. She realizes that partners often have better insight into local markets and are therefore more suited to organize targeted marketing activities. Recently, her company's new product was launched and in order to give resellers an incentive to resell this product, she has decided to set up a targeted program. This program will last for six months, active immediately, and only special certified dealers will be eligible for participation. Under the program, resellers will accrue 3% of their revenues for the server product line into their program account. All the funds accrued can then be used by the resellers to run marketing activities. However, her firm will only refund 50% of the total amount approved for every activity.

As part of the setup, the program manager selects the resellers eligible for participation and adds them to the program. By clicking the Generate button, individual program accounts are generated for each participating reseller.

The sales manager at one of the brand owner's resellers has noticed the new program set up by the brand owner. He decides to set up a local event to promote their new product to his existing client base. His plan is to invite his top 20 customers to a seminar discussing the product. He creates and submits a pre-approval to obtain approval from the brand owner to run his event.

After the event, the reseller collects invoices for the individual line items on his pre-approval and submits a claim for payment. He submits the claim, aware that the brand owner will fund a maximum 50% of the total amount.

The channel account manager at the brand owner company reviews the claim. He sees that all conditions for payment are met. He sets the status of the claim to Co-op Accepted. However, since he can only approve claims up to \$1000, the claim status is not automatically set to Final Approved. Instead, the claim gets routed to his manager for review, who approves it.

## Process of Setting Up MDF Programs

To set up MDF programs, perform the following tasks:

- ["Creating MDF Snapshot Periods" on page 44](#)
- ["Making Accounts Eligible for MDF Participation" on page 44](#)
- ["Enabling the HTIM MDF Period Ending Process Workflow" on page 45](#)
- ["Setting Up MDF Approval Authority Limits" on page 45](#)

## Creating MDF Snapshot Periods

Program account snapshots give an overview of all transactions for a given program account by period. They contain the amount of available and used funds in an MDF during each period. To use snapshots successfully, periods must first be set up in the Administration - Data screen > Periods view. For more information about creating periods, see the chapter which discusses ongoing applications administration tasks in *Siebel Applications Administration Guide*.

Prior to creating MDF programs, you should create at least six snapshot periods of type HTIM MDF Snapshot to cover the current month and the five following months.

This task is a step in ["Process of Setting Up MDF Programs" on page 43](#).

### *To create snapshot periods*

- 1 Navigate to the Administration - Data screen > Periods view.
- 2 In the Period Definition list, create a new record.
- 3 Enter a name for the period in the Period field.
- 4 From the Type drop-down list, select HTIM MDF Snapshot Month.
- 5 Complete any other the necessary fields. For more information about these fields, see *Siebel Applications Administration Guide*.

Repeat [Step 2](#) to [Step 5](#) for each subsequent period until you have created at least six HTIM MDF Snapshot Month periods. Each period you create should begin at the end of the preceding period.

**NOTE:** You can edit snapshots in the Monthly Snapshot (Admin) view in the MDF Program Accounts screen.

## Making Accounts Eligible for MDF Participation

When setting up an MDF program, you can only include participants from partner accounts where the Fund Eligible field has been selected. Prior to creating an MDF program, you must make sure that each partner you want to include in an MDF program is eligible for funds.

This task is a step in ["Process of Setting Up MDF Programs" on page 43](#).

### *To make accounts eligible for MDF programs*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select the account you would like to include in an MDF program.
- 3 Locate the Fund Eligible field.
  - a If the value in the Fund Eligible field is Y, this account is already eligible for funds and can participate in an MDF program.
  - b If the value in the Fund Eligible field is N, click the field and select the check box to change the value to Y.

## Enabling the HTIM MDF Period Ending Process Workflow

The HTIM MDF Period Ending Process workflow should be run as a server task (workflow manager task). It can be either a manual task or a repeated task running at the end of the period.

This task is a step in [“Process of Setting Up MDF Programs” on page 43](#).

### *To enable the HTIM MDF Period Ending Process Workflow*

- 1 Navigate to the Administration - Business Process screen > Workflow Processes view.
- 2 Locate the workflow HTIM MDF Period Ending Process.
- 3 Verify that the workflow is activated.

For more information about the HTIM MDF Period Ending Process workflow, see [“HTIM MDF Period Ending Process Workflow” on page 59](#). For more information about business process workflows, see *Siebel Business Process Designer Administration Guide*.

## Setting Up MDF Approval Authority Limits

You need to set up an approval authority limit in the Administration - User screen for each employee responsible for approving MDF programs.

This task is a step in [“Process of Setting Up MDF Programs” on page 43](#).

### *To set up approval authority limits*

- 1 Navigate to the Administration - User screen > Employees view.
- 2 Drill down on the employee for whom you want to set up approval authority limits.
- 3 Click the More Info view tab.
- 4 In the Approval Authority section, in the Fund Approval Limit field, enter an approval amount.

## Creating an MDF Program and Program Account

The program manager creates an MDF program and adds partners to it. A program account is then created automatically to allow the partner can take advantage of the MDF.

### *To create an MDF program and a program account*

- 1 Navigate to the MDF Programs screen > Programs view.

- 2 Create a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Aging Period (Month)	Number of days until new credits expire.
Start Date	Date pre-approvals can start to be created against the program.
End Date	Date after which partners can no longer create pre-approvals against the program.  <b>NOTE:</b> After this date, partners can still claim fund accruals in their Program Accounts (until the claim receipt deadline).
Amount	Total dollar amount committed to the program. Required if MDF is selected from the Type field.
Type	MDF or Co-op program.
Market	Market segment.
Program GL Code	General ledger account under which the program is created.
Participation Rate %	Indicates the percentage of activities organized under this program that the brand owner is willing to fund. This value transfers down to the pre-approvals and claim line items.
Available Balance	Total Balance = [Total Credit] - [Total Debit]  These values are rolled up from the credit and debit records through the snapshot, to the program account, and then to the program.
Credit	Rolled up from program account.
Debit	Rolled up from program account.

- 3 Drill down on the new record, click the Program Participants view tab, and then click Add.
- 4 In the Pick Account dialog box, select the partners you want to include in this program.
- 5 Click OK.
- 6 In the Program Accounts subview, click Generate.

Program accounts are created automatically for each partner.

## Setting Up a Program Account's First Snapshot

Before you can add credits to a program account, you must set up snapshot periods for the program account.

### *Setting up the first snapshot*

- 1 Navigate to the MDF Program Accounts screen.
- 2 Locate and drill down on the program account for which you want to set up snapshots.
- 3 Click the Monthly Snapshot (Admin) view tab and add a new record.
- 4 Click the Period select button.
- 5 In the Pick Period dialog box, query for Period Type of HTIM MDF Snapshot Month.
- 6 Select the period with the Start Date that is less than or equal to today's date, and the End Date less than or equal to today's date and then click OK.

## Removing a Participant From an MDF Program

You may need to remove a participant from an MDF program sometimes.

### *To remove a participant from an MDF program*

- 1 Navigate to the MDF Programs screen.
- 2 Drill down on the program from which you want to remove a participant.
- 3 In the Program Participants list, select the participant you want to remove.
- 4 Click the menu button and then click Delete Record.
- 5 In the warning dialog box, click OK to confirm deletion of this record.
- 6 Navigate to the MDF Program Accounts screen.
- 7 In the Program Accounts list, select the program account belonging to the participant you are removing.
- 8 In the program account form, click the menu button and then click Delete Record.
- 9 In the warning dialog box, click OK to confirm deletion of this record.

The participant no longer has access to this MDF program.

## Adding a Credit to a Program Account

Credits must be created manually for each program account. Credits make funds available to resellers.

**NOTE:** Co-op program credits are incentive-based while MDF program credits are discretionary.

### *To create a credit*

- 1 Navigate to the MDF Program Accounts screen > Program Accounts view.

- 2 Drill down on the program account record for the partner to whom you want to provide a credit.
- 3 Click the Checkbook (RW) view tab and add a new record.
- 4 Complete the necessary fields. Some fields are described in the following table.

Field	Comments
Type	Indicates the nature of the credit. Values available are: Accrual, Adjustment, and Re-instatement.
Sub Type	Further indicates the nature of the credit. Values available are: Earned or Discretionary.
Market	Market segments relevant to this partner.
Amount	Amount of the credit.
Period Posted	Period during which this credit is posted.
Expiration Date	Date this credit is no longer available for the partner's use.

Repeat for each partner or program account for which you want to provide a credit.

## Creating a Pre-Approval

Using the Partner Portal, the reseller creates a pre-approval so that they can request funds offered by the MDF.

The reseller creates a pre-approval with several associated line items. Line items allow the partner to identify specific items required for the marketing activity and their estimated cost.

### *To create a pre-approval*

- 1 In the Partner Portal, navigate to the MDF Pre-Approvals screen > My Pre-Approvals view.
- 2 Add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Pre-Approval #	Automatically generated number for the pre-approval.
Pre-Approval Name	Description of the pre-approval.
Status	Approval status of the pre-approval.
Program Name	Name of the program to which the program account associated with this pre-approval belongs.
Program Account	Program account against which the pre-approval was created.



Field	Comments
Assigned To	Name of person responsible for reviewing and approving this pre-approval.
Partner	Name of the partner account that is submitting the pre-approval request.
Submitted By	Name of person who submitted this pre-approval.
Total Amount Proposed	Sum total of the values in each Amount Proposed field in the line items.
Total Participation Amount	Value is equal to the participation rate multiplied by the amount proposed as part of the pre-approval request.  <b>NOTE:</b> The participation rate value comes from the MDF program.
Total Amount Approved	Calculated field. The amount is rolled up from the pre-approval line items.

- 3 Drill down on the pre-approval record and click the Line Items view tab.
- 4 Add a new record for each component of this pre-approval and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Name	Enter a description for this line item, for example, billboard or print ad.
Status	Status for the line item. Value varies depending on where the pre-approval is in the current review process.
Amount Proposed	Enter the amount of money you are requesting for this line item.
Reason	Reason why the pre-approval request was rejected.
Category	Indicates the kind of item this is. Values include, Advertisement, Seminar, Conference, Trade Show, and Collateral.
Market	Market segments relevant to this partner.
Vendor Name	Name of vendor supplying the good or service indicated in the line item.
Start Date	Date the specified marketing activity starts.
End Date	Date the specified marketing activity ends.
Participation Rate	Value comes from the program account.

Field	Comments
Participation Amount	Calculated field indicating the maximum amount the brand owner will contribute. The value comes from the participation rate multiplied by the proposed amount.
Amount Approved	Calculated field indicating how much the brand owner approves for a given line item. This defaults to the participation amount multiplied by the approved percentage.

- 5 Click the Activity or Activity Plans view tab to associate activities with this pre-approval.
- 6 In the Status field of the pre-approval form, select Submitted to submit the pre-approval.
- 7 Save your changes.

## Reviewing a Pre-Approval

After a pre-approval has been submitted, the channel account manager reviews it. He can change amounts, reject line items, and approve as appropriate.

### *To review a pre-approval*

- 1 Navigate to the MDF Pre-Approvals screen > All Pre-Approvals view.
- 2 Locate and select the pre-approval you want to review.
- 3 In the Status field, do one of the following:
  - a If this is for a program of Type Co-op, select COOP In Progress.
  - b If this is for a program of Type MDF, select Field In Progress.
- 4 Drill down on the pre-approval and click the Line Items view tab to review each line item.
- 5 In the Status field of each line item, select one of the following:
  - a If you approve the line item, select Accepted As Is.
  - b If you approve the line item but have made changes to it, select Accepted With Changes.
  - c If you do not approve the line item, select Denied.
  - d If you want the partner to make changes, select Returned.
- 6 In the pre-approval form, if the status is currently set to COOP In Progress, select one of the following, otherwise move to [Step 7](#):
  - a If you approve the pre-approval, select COOP Accepted.
  - b If you do not approve the pre-approval, select COOP Denied.
  - c If you approve the pre-approval but have made some changes to it, select COOP Accepted with Changes.

- d If you want to return the pre-approval to the reseller to make changes before you approve or reject it, select COOP Returned.
- 7 In the pre-approval form, if the status is currently set to Field In Progress, select one of the following:
- a If you approve the pre-approval without changes, select Field Accepted. The field can then be changed to Field Next Accepted and/or to Field Final Accepted.
  - b If you do not approve the pre-approval, select Field Denied. No more changes can be made to the pre-approval.
  - c If you want the reseller to make changes to the pre-approval before you approve or reject it, select Field Returned.

## Creating a Claim

After the partner has completed the activity for which he submitted the pre-approval, he can create and submit a claim to obtain the funds.

**NOTE:** One pre-approval can have several claims associated with it, but a claim can only be associated with one pre-approval.

### To create a claim

- 1 In the Partner Portal, navigate to the MDF Claims screen.
- 2 Add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Status	Status of the claim. Values vary depending on where the claim is in the review process.
Pre-Approval #	Indicates the pre-approval against which this claim is being made. All claims originate from a pre-approval.
Claim Name	Name of the claim.
Program Name	Name of the program from which this claim originates.
Has Enough Funds	If this check box is selected, it indicates that the internal available balance field is greater than or equal to the total amount approved field.
Total Amount Claimed	Total sum of money requested by the reseller.
Total Amount Approved	Total sum of approved line items.
Total Participation Amount	Value is equal to the participation rate multiplied by the amount proposed.  <b>NOTE:</b> The participation rate value comes from the MDF program.

- 3 Save the claim, drill down on it, and enter more information in the More Info form as needed. Some fields are described in the following table.

Field	Comments
Claim Category	Choose from a variety of types of events to describe what this claim is for.
Pre-Approval Category	Type of event the pre-approval is for. Value comes from the pre-approval record.
Promotion Name	Provide the name used to promote your event.

- 4 Click the Line Items view tab, add a new record for each completed activity or task outlined in the pre-approval, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Amount Claimed	Indicates how money much is being requested for this line item.
Market	Market segments relevant to this partner.

- 5 In the claim form, in the Status field, select Submitted to submit the claim.
- 6 Save your changes.

## Reviewing a Claim

After the reseller submits a claim, the brand owner reviews it and decides whether it should be approved.

### *To review a claim*

- 1 Navigate to the MDF Claims screen.
- 2 In the Claims list, locate and drill down on the claim you want to review.
- 3 In the Status field of the claim, select Coop In Progress from the drop-down list.
- 4 Click the Line Items view tab and review each of the claim's line items.
- 5 For each line item enter values in the Amount Approved and Final Amount Approved fields.
 

**NOTE:** Amount Approved could be different from Final Amount Approved if the final approver has to make changes. Final Amount Approved is the field used for back office processing.
- 6 For each line item, in the Status field, do the following:
  - a If you approve the amount claimed in the line item, select Approved.
  - b If you do not approve the amount claimed in the line item, select Denied.

- c** If you want changes made to the line item before approving, select Returned.
- 7** In the Status field of the claim, change the value from Coop In Progress to one of the following:

  - a** If you approve the claim, select COOP Accepted.  
After the Status is changed to Coop Accepted, the claim is processed. If there are sufficient funds and the employee has a sufficient approval limit, then the claim status is automatically set to Final Approved and the appropriate debits are created.
  - b** If you do not approve the claim, select COOP Denied.  
The claim cannot be edited any further.
  - c** If you want changes to be made to the claim before approving, select COOP Returned.  
The reseller can change the status to Pending and continue to work on the claim.



# 7

## Workflows for High Tech and Industrial Manufacturing

Oracle's Siebel High Tech and Industrial Manufacturing includes the following workflows:

- "HTIM SPA Quote Approval Workflow" on page 55
- "HTIM Validate Claim Items Workflow" on page 57
- "HTIM MDF Period Ending Process Workflow" on page 59

### HTIM SPA Quote Approval Workflow

This workflow creates a pricing agreement when the status of an SPA quote is changed to Approved. The agreement is created with one entitlement for price changes and overrides the price list applicable for the given distributor account. For every SPA quote line item with status Approved in the SPA quote, an Entitlement Price Detail line item will be created, stating part number under consideration, the quantity approved, the balance quantity as well as the authorized price and purchase price (the price at which the distributor originally purchased the parts). The workflow appears in [Figure 1](#).

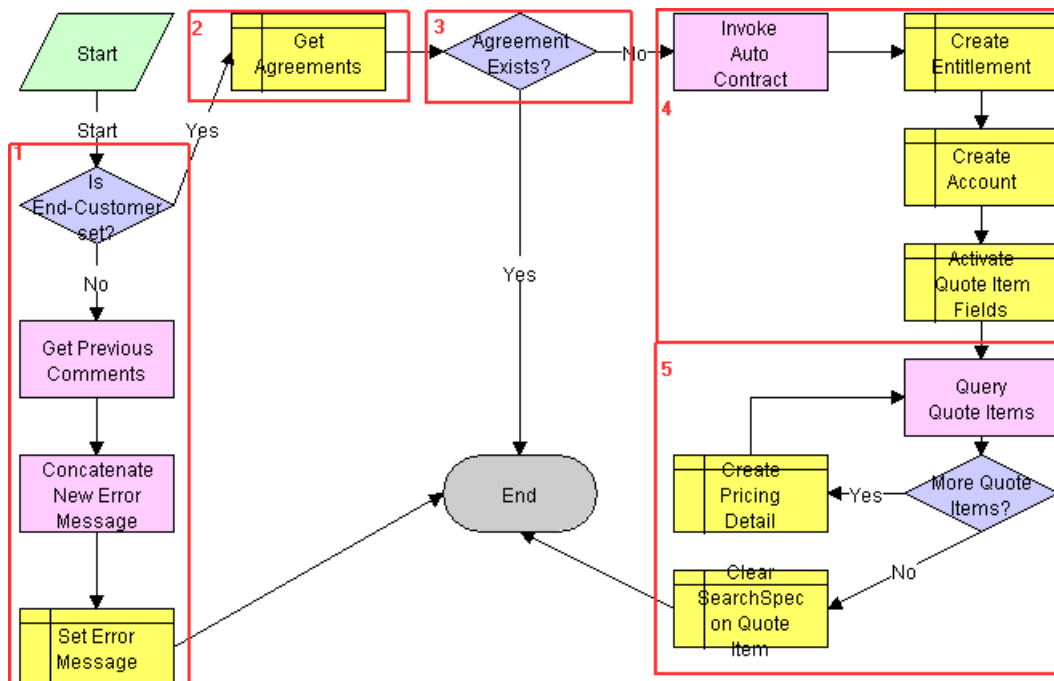


Figure 1. SPA Quote Approval Process

The workflow performs the following steps:

- 1 If no end customer is defined at the quote header level when the quote status is changed to approved, the workflow will stop without generating an agreement and enter the value "End Customer must be set. No agreement generated" concatenated with other information in the Rejection Reason field for the quote back into Rejection Reason.

The application includes a state model that requires end customer id be specified for state transition from In Progress to Submitted or from Recalled to Submitted.

- 2 The system verifies there is no existing agreement for the given SPA by querying the list of agreements in the database. This step promotes integrity of the data.
- 3 If an agreement exists, the workflow ends. If no agreement exists, the workflow creates a new agreement.
- 4 After the agreement is created, one single entitlement is created under the agreement. This entitlement captures the Pricing Details for the different parts on SPA quote line items with status Approved. Under Accounts, the workflow adds the account record for the end customer, since this is the only account the given entitlement is applicable for. For more information about agreements, see the *Siebel Field Service Guide*.
- 5 After the entitlement is created, the workflow goes through the individual SPA quote line items one by one and:
  - a Creates a new Price Detail record for every quote line item with status Approved.
  - b Sets the corresponding pricing values, as agreed upon within the quote, such as part number, approved quantity, purchase cost, suggested resale price, and authorized cost. The balance quantity is initially set to equal the value of the approved quantity.



## HTIM Validate Claim Items Workflow

This workflow steps through a claim, line item by line item, and validates the line items against the corresponding SPA agreement. The workflow is activated by the Validate button on the HTIM All Claims Across Organizations view. The workflow appears in Figure 2.

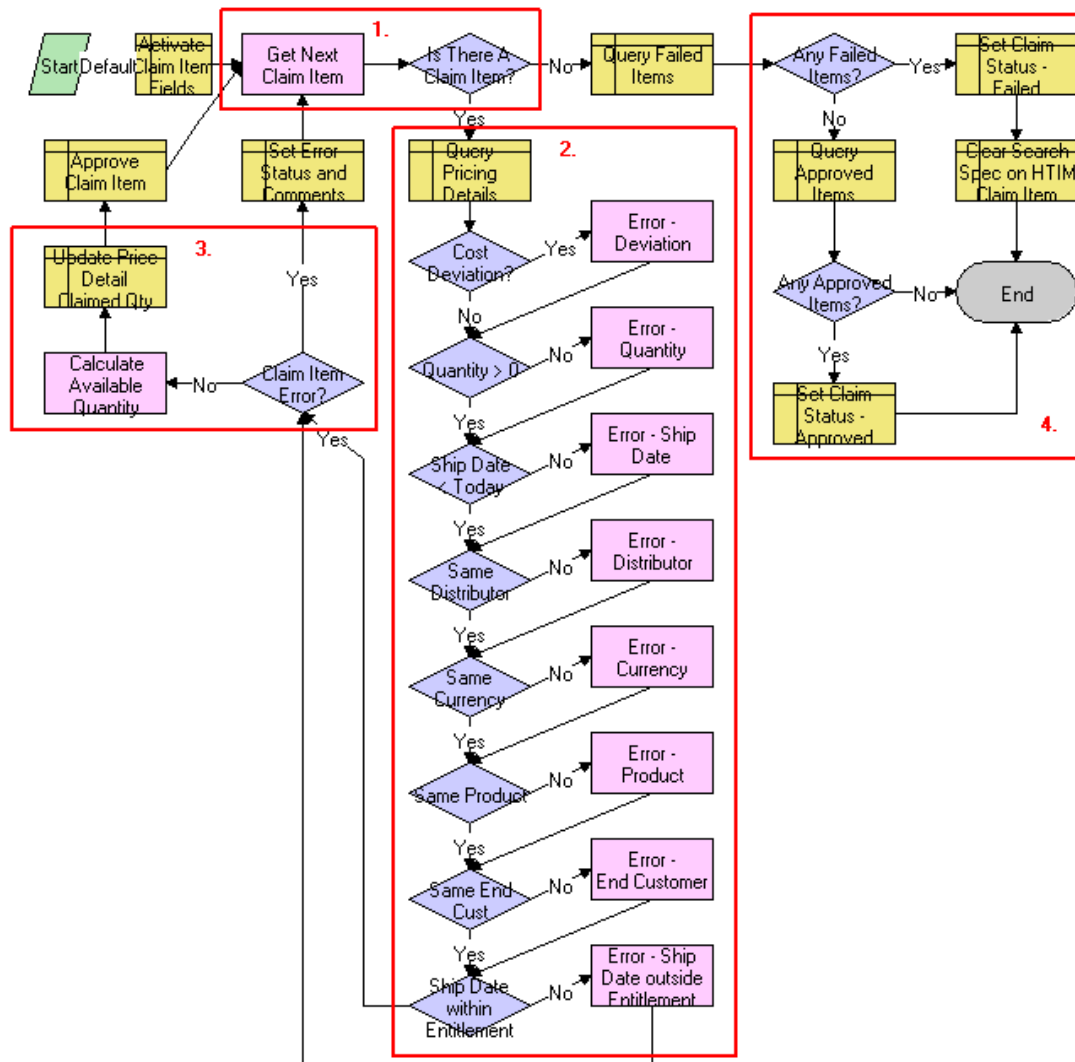


Figure 2. Claim Validation Process

Once started, the workflow goes through each line item on the claim and performs the following operations:

- 1 The workflow identifies if there is another claim line item to validate or not.
- 2 If there is an additional claim line item to validate, the workflow performs the following checks:

- a Looks up the corresponding agreement/entitlement for the line item under consideration based on the value stated on the claim line item and gets the corresponding "Price Details" as captured under the entitlement.
- b Calculates the cost deviation between the values stated on the claim and the value as agreed upon under the agreement (that is, the difference between {Authorized Cost-Purchase Cost}\*Quantity} on claim and price detail). The tolerance on the deviation is set to 0. You can set the value to the tolerance you deem acceptable by modifying the conditional expression behind the decision point.
  - If the deviation is acceptable, the workflow moves on to the next decision step.
  - If the deviation is not acceptable, the workflow sets the Rejection Reason on the claim line item to *Difference between Quoted Credit and Distributor Claimed Credit* and moves on to the next validation step.
- c Verifies whether the claimed quantity is greater than 0.
  - If it is, the workflow continues with the next validation step.
  - If it is not, the workflow sets the Rejection Reason on the claim line item to *Claimed Quantity is <= 0* and moves on to the next validation step.
- d Verifies whether the ship date is greater than today. Claims can only be submitted by the distributor after the product has been shipped to the end customer.
  - If it is, the workflow continues with the next validation step.
  - If it is not, the workflow sets the Rejection Reason on the claim line item to *Ship Date cannot be in the future*, and moves on to the next validation step.
- e Verifies whether the distributor on the claim is the same as the distributor on the entitlement.
  - If it is, the workflow continues with the next validation step.
  - If it is not, the workflow sets the Rejection Reason on the claim line item to *Distributor does not match with Entitlement Distributor*, and moves on to the next validation step.
- f Verifies whether the claim currency is the same currency as the agreement currency.
  - If it is, the workflow continues with the next validation step.
  - If it is not, the workflow sets the Rejection Reason on the claim line item to *Currency does not match with Entitlement Currency*, and moves on to the next validation step.
- g Verifies whether the product ID on the claim line item corresponds to the product ID on the agreement.
  - If it does, the workflow continues with the next validation step.
  - If it does not, the workflow sets the Rejection Reason on the claim line item to *Product does not match any Price Detail Product in the Entitlement*, and moves on to the next validation step.
- h Verifies whether the end customer on the claim corresponds to the end customer on the agreement.
  - If it does, the workflow continues with the next validation step.

- If it does not, the workflow sets the Rejection Reason on the claim line item to *End Customer does not match with Entitlement End Customer*, and moves on to the next validation step.
- i Verifies whether the ship date stated on the claim is within the validity period of the entitlement.
  - If it is, the workflow continues with the next validation step.
  - If it is not, the workflow sets the Rejection Reason on the claim line item to *Ship Date is not within Entitlement Start Date and End Date*, and moves on to the next workflow step.
- 3 If the line item was processed without errors, the workflow calculates the new balance quantity (original balance minus shipped quantity) on the corresponding entitlement price detail and sets the status of the claim line item to Approved.
 

If not, the workflow continues with the next line item if available ([Step 1](#)).
- 4 After all line items have been validated and set to a status of Approved or Failed, the workflow updates the status of the overall claim.
  - If any of the line items on the claim failed, the status of the claim is set to Failed.
  - If all line items were approved, the claim status is set to Approved.

You can extend the number of validation steps, if required. For instance, in certain cases, you may want to verify whether the resale price stated on the claim line item corresponds to the retail price requested by the manufacturer as captured in the agreement. This can be done by adding the validation step after the Ship Date within Entitlement validation step.

## HTIM MDF Period Ending Process Workflow

This workflow runs at the end of a period. It transfers credits and debits to a new snapshot record for the next period. The workflow appears in [Figure 3](#).

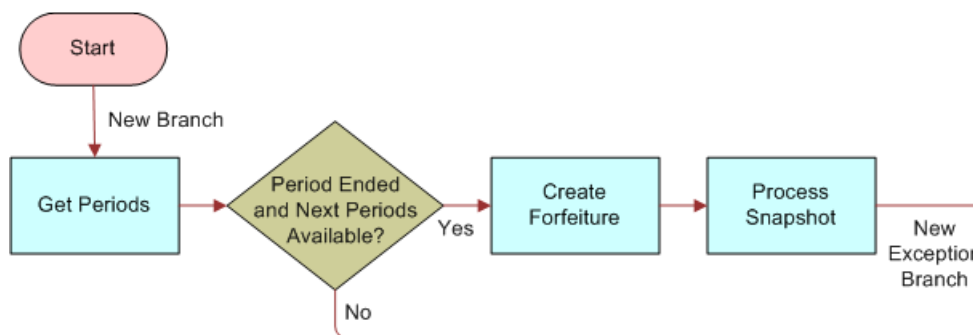


Figure 3. HTIM MDF Period Ending Process

This workflow performs the following steps:

- 1 The workflow looks at the current period.

- 2** The workflow verifies that the period has ended and that a subsequent period is available.
  - a** If the period has not ended and/or there is no subsequent period available, the workflow ends.
  - b** If the period has ended and the subsequent period is available, the workflow moves to the next step.
- 3** All credits which currently exist in this period are voided. A debit entry is created for the next snapshot period as needed, the next snapshot is created, and the workflow ends.

# Index

## A

### accounts

- claim, creating 51
- claim, reviewing 52
- credit, adding to 47
- first snapshot, setting up 46
- MDF participation, making eligible 44
- pre-approval, creating 48
- pre-approval, reviewing 50
- program account, creating 45

### administrative setup tasks

- design registration, about setting up
  - incentives 17
- design registration, making components eligible 16
- email notification, about setting up 17
- setting up, about 15
- table of 16

### agreement

- reviewing for an SPA quote 37

### applications

- employee application, about 11
- Partner Portal, about 11
- Partner Portal, submitting registration through 21
- Siebel PRM, differences between 12

### approval

- pre-approval, creating 48
- pre-approval, reviewing 50

### approval authority limits

- setting up 45

## C

### claims

- creating 51
- HTIM Validate Claim Items workflow 57
- reviewing 52

### competition

- incentives for registering design programs 17

### competitive pricing, about 33

### components

- design opportunities, tracking 31
- design opportunity, reviewing and approving 29
- design opportunity, submitting 28
- design win or loss, entering (distributor) 25

- design win or loss, entering (salesperson) 30
- distributor selling to OEM, process of 21
- point-of-sales data, submitting 26
- point-of-sales data, viewing for design program 27
- registration, checking whether approved (distributor) 25
- registration, checking whether approved (salesperson) 30
- registration, reviewing and approving 24
- registration, submitting for a design program 21
- salesperson, processing of selling to OEM 28
- tracking sales 27

### credit, creating 47

### cross-references

- differences from Siebel PRM 12

## D

### design opportunity

- design win or loss, entering 30
- registration, checking whether approved (salesperson) 30
- reviewing and approving 29
- submitting 28
- tracking 31

### design program

- design win or loss, entering 25
- point-of-sales data, submitting 26
- point-of-sales data, viewing for design program 27
- registration, checking whether approved 25
- reviewing and approving the registration 24
- submitting a registration 21
- tracking sales 27

### Design Program Administration screen 11

### Design Programs screen

- employee application 11
- Partner Portal 11

### design registration

- about 9
- components, making eligible 16
- design win or loss, entering 25
- distributor selling components to OEM, process of 21
- email notification, about setting up 17
- incentives, about setting up 17

- overview 19
- point-of-sales data, submitting 26
- point-of-sales data, viewing for design program 27
- registration, checking whether approved 25
- registration, reviewing and approving 24
- registration, submitting for a design program 21
- scenario 20
- tracking sales 27

**design win**

- design registration scenario 20
- overview 19

**Distributor Margin Management**

- See Special Pricing Authorization

**distributors**

- components, process of selling to OEM 21
- design registration, about setting up incentives 17
- design registration, making components eligible 16
- design win or loss, entering 25
- email notification, about setting up 17
- Partner Portal, about 11
- point-of-sales data, submitting 26
- point-of-sales data, viewing for design program 27
- point-of-sales reports and SPA claims 37
- registration, checking whether approved 25
- registration, submitting for a design program 21
- SPA claim report, submitting 39
- SPA claim, creating through Partner Portal 38
- SPA claims, submitting 37
- SPA quote, creating 34
- SPA quote, submitting 36
- SPA reports and SPA claims 37
- special pricing authorization 10

**E****email**

- design opportunity, about automatic notification 30
- distributors, about automatic notification 25
- email notification, about setting up 17

**employee application**

- about and screens 11
- Siebel PRM, differences between 12

**F****features, new 7****H****HTIM MDF Period Ending Process**

- workflow 59

**HTIM MDF Period Ending Process workflow, enabling 45****HTIM SPA Quote Approval workflow 55****HTIM Validate Claim Items workflow 57****I****incentives**

- for registering design programs 17

**internal salesperson**

- process of selling components to OEM 28

**L****loss**

- design win or loss, entering (distributor) 25
- design win or loss, entering (salesperson) 30

**M****Market Development Fund Management**

- about 10
- accounts, making eligible 44
- approval authority limits, setting up 45
- claim, creating 51
- claim, reviewing 52
- first snapshot, setting up 46
- key features 42
- MDF program and program account, creating 45
- overview 41
- pre-approval, creating 48
- pre-approval, reviewing 50
- program account snapshots, creating and editing 44
- program account, adding a credit to 47
- removing participant 47
- scenario 43

**modules**

- about 12

**Monthly Snapshot view**

- using to edit snapshots 44

**N****new features 7****O****OEM**

- components, process of selling to 21
- design opportunities, tracking 31
- design opportunity, reviewing and approving 29

- design opportunity, submitting 28
- design win or loss, entering (distributor) 25
- design win or loss, entering (salesperson) 30
- point-of-sales data, submitting 26
- point-of-sales data, viewing for design program 27
- registration, checking whether approved (distributor) 25
- registration, checking whether approved (salesperson) 30
- registration, reviewing and approving 24
- registration, submitting for a design program 21
- salesperson, process of selling to 28
- tracking sales 27
- options**
  - about 12
- P**
- participant**
  - removing from MDF program 47
- partner manager**
  - difference between Siebel PRM 12
- Partner Portal**
  - about and screens 11
  - registration, submitting through 21
  - Siebel PRM, differences between 12
  - SPA claim, creating through 38
  - SPA quote, creating 34
  - SPA quote, submitting 36
- point-of-sales data**
  - submitting 26
  - viewing for design program 27
- point-of-sales reports, and SPA claims** 37
- POS Orders view, using** 26
- pre-approval**
  - creating 48
  - reviewing 50
- pricing**
  - agreement, HTIM SPA Quote Approval workflow 55
  - special pricing authorization 10
- program account**
  - credit, adding to 47
  - first snapshot, setting up 46
  - snapshots, creating and editing 44
- R**
- registration**
  - approved, checking (distributor) 25
  - components, making eligible 16
  - design registration overview 19
  - design registration scenario 20
  - design registration, about 9
  - design win or loss, entering (distributor) 25
  - design win or loss, entering (salesperson) 30
  - email notification, about setting up 17
  - incentives, about setting up 17
  - point-of-sales data, submitting 26
  - point-of-sales data, viewing for design program 27
  - registration, checking whether approved (salesperson) 30
  - reviewing and approving (supplier) 24
  - submitting for a design program 21
  - tracking sales 27
- reports**
  - SPA claim report, submitting 39
- S**
- sales**
  - point-of-sales data, submitting 26
  - point-of-sales data, viewing for design program 27
  - tracking 27
- salesperson**
  - components, process of selling to OEM 28
  - design opportunities, tracking 31
  - design opportunity, reviewing and approving 29
  - design opportunity, submitting 28
  - design registration, about setting up incentives 17
  - design registration, making components eligible 16
  - design win or loss, entering 30
  - registration request, verifying whether approved 30
- setup tasks**
  - administrative tasks, table of 16
  - design registration, about setting up incentives 17
  - design registration, making components eligible 16
  - email notification, about setting up 17
  - HTIM MDF Period Ending Process workflow, enabling 45
  - MDF approval authority limits, setting up 45
  - program account snapshot, creating and editing 44
  - setting up, about 15
- Ship from Stock and Debit**
  - See Special Pricing Authorization
- Siebel eAI, using to track sales** 27
- Siebel PRM**
  - differences between 12

- setting up, about 15
  - Siebel Tools**
    - about using to register design programs 17
  - snapshot**
    - periods, creating and editing 44
    - program account, setting up 46
  - SPA**
    - See Special Pricing Authorization
  - SPA agreement**
    - HTIM Validate Claim Items workflow 57
  - SPA claims**
    - See Special Pricing Authorization
  - SPA Claims screen**
    - employee application 11
    - Partner Portal 11
  - SPA quote**
    - HTIM SPA Quote Approval workflow 55
    - line items, entering or changing 36
  - SPA Quotes screen**
    - employee application 11
    - Partner Portal 11
  - SPA reports, and SPA claims** 37
  - Special Pricing Authorization**
    - defined and conditions 33
    - point-of-sales reports and SPA claims 37
    - scenario 33
    - SPA claim report, submitting 39
    - SPA claim, creating through Partner Portal 38
    - SPA claim, validating (supplier) 40
    - SPA claims, submitting (distributor) 37
    - SPA quote and claim management, process of 34
    - SPA quote, creating (distributor) 34
    - SPA quote, reviewing an agreement 37
    - SPA quote, reviewing, approving, or rejecting 36
    - SPA quote, submitting (distributor) 36
    - SPA reports and SPA claims 37
    - support of, about 10
  - supplier book price reductions**
    - about 33
  - suppliers**
    - registration, reviewing and approving 24
    - SPA claim, validating 40
    - SPA quote, reviewing an agreement 37
    - SPA quote, reviewing, approving, or rejecting 36
    - tracking sales 27
- T**
- Tools**
    - about using to register design programs 17
- W**
- win**
    - design registration win 20
    - design win or loss, entering (distributor) 25
    - design win or loss, entering (salesperson) 30
  - workflow**
    - HTIM MDF Period Ending Process workflow 59
    - HTIM MDF Period Ending Process workflow, enabling 45
    - HTIM SPA Quote Approval workflow 55
    - HTIM Validate Claim Items workflow 57