Siebel CRM

High Tech and Industrial Manufacturing Guide

Siebel Innovation Pack 2017

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Contents

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Preface

This guide covers Siebel High Tech and Industrial Manufacturing.

Audience

This guide is intended for users and administrators.

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

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Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Siebel Partner Relationship Management Administration Guide*
- *Siebel Applications Administration Guide*
- *Siebel Business Process Framework: Workflow Guide*
- *Siebel Field Service Guide*
- *Siebel Forecasting Guide*

Conventions

The following text conventions are used in this document:

Convention	Meaning
italic	Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands, computer code, text that you enter, directory paths, or file paths.

1

What's New in This Release

This chapter describes new product features.

> **Note:** Siebel Innovation Pack 2017 is a continuation of the Siebel 8.1/8.2 release.

What's New in Siebel CRM High Tech and Industrial Manufacturing Guide, Siebel Innovation Pack 2017

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

What's New in Siebel CRM High Tech and Industrial Manufacturing Guide, Siebel Innovation Pack 2016

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 chapter provides an overview of Siebel High Tech and Industrial Manufacturing, and it lists the key features. It includes the following topics:

- "About Siebel High Tech and Industrial Manufacturing" on page 2-1
- "Key Features of Siebel High Tech and Industrial Manufacturing" on page 2-3
- "About Modules and Options" on page 2-3
- "Differences Between Siebel PRM and Siebel High Tech and Industrial Manufacturing" on page 2-4

About Siebel High Tech and Industrial Manufacturing

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.

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.

Special pricing authorization is generally used in the high tech and industrial manufacturing industries. Siebel Partner Relationship Management (PRM) 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 *Siebel Partner Relationship Management Administration Guide*

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 *Siebel Partner Relationship Management Administration Guide*. The sections about the advanced MDF option is most relevant to the high tech and industrial manufacturing industries.

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.

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 screen that is 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.

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 in this 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.

- **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.

- **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 3-1.

- **Sharing Data with Partners.** For information about sharing design programs and design registrations, see Chapter 4, "Design Registration, Opportunity Management, and Design Win."

- **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."

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 3-1
- "Administrative Setup Tasks for Siebel High Tech and Industrial Manufacturing" on page 3-2

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.

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 3–1 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 3–1 also directs you to documentation that provides information about each task.

When setting up your application, use Table 3–1 in combination with *Siebel Partner Relationship Management Administration Guide* and *Siebel Applications Administration Guide*.

Table 3–1   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.	"About Setting Up Siebel High Tech and Industrial Manufacturing" on page 3-1 *Siebel Partner Relationship Management Administration Guide* *Siebel Applications Administration Guide*
Making Products Eligible for Design Registration	Allow employees and partners to register these products.	"Making Products Eligible for Design Registration" on page 3-2
Setting Up Incentives to Register Design Programs	Give distributors a discount on components after they register the design.	"About Setting Up Incentives to Register Design Programs" on page 3-2
Setting Up Email Notification of Approval of Design Registration	Automatically notify distributors when design registration is approved.	"About Setting Up Email Notification of Approval of Design Registration" on page 3-3

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, then the 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 *Siebel Partner Relationship Management Administration Guide*.

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 Framework: Workflow Guide*.

4

Design Registration, Opportunity Management, and Design Win

This chapter provides an overview of design registration, opportunity management, and design win. It includes the following topics:

- "Overview of Design Registration, Opportunity Management, and Design Win" on page 4-1
- "Scenario for Design Registration and Win" on page 4-2
- "Process of Distributor Selling Components to OEM" on page 4-3
- "Process of Internal Salesperson Selling Components to OEM" on page 4-8

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 4-3.

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 4-8.

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 the section about special pricing authorization in *Siebel Partner Relationship Management Administration Guide*.

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 4-3
- "Reviewing and Approving the Registration (Supplier)" on page 4-5
- "Checking Whether a Registration Request was Approved (Distributor)" on page 4-6
- "Entering a Design Win or Loss (Distributor)" on page 4-6
- "Submitting Point-of-Sales Data (Distributor)" on page 4-7
- "Tracking Sales (Supplier)" on page 4-7
- "Viewing Point-Of-Sales Data for a Design Program (Distributor)" on page 4-8

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 4-3.

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.

Field	Comments
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 next to 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

To review and approve registration for a program

1. Navigate to the Administration - Design Programs, then Design Opportunities view.

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 next to 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 Siebel High Tech and Industrial Manufacturing" on page 3-1.

This task is part of "Process of Distributor Selling Components to OEM" on page 4-3.

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 next to the Query button to view the approval date, which was automatically entered when the supplier changed the status to Approved 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 4-3.

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, and then the 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 4–1. Distributors should submit reports with the data needed to populate these fields.

Table 4–1   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 4-3.

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.

4. Display the POS Orders view 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 4-3.

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 4-9
- "Approving the Design Opportunity" on page 4-10
- "Verifying Whether a Registration Request was Approved" on page 4-10
- "Entering a Design Win or Loss" on page 4-11
- "Tracking Design Opportunities" on page 4-11

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 4-8.

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. Display the More Info view to enter further information about the program.

4. Display the Account Team view and add employees who will be working on this program.

   Anyone who is on the account team will be able to view this design programs record and the associated information.

5. Display the Design Opportunities view and create a new Design Opportunities record.

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

7. Display the Revenues view to add information about projected sales and projected prices.

8. Navigate to the Design Programs, then the Contacts view to add more information about the contact at the OEM.

9. In the Design Opportunities view, in 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 4-8.

To review and approve a design opportunity

1. Navigate to Administration - Design Programs, then Design Opportunities view.

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 3-3.

> **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 4-8.

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 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 4-8.

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, in 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 4-8.

To track design opportunities

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

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