

American Express Partner Portal

wireframes_amex_partner_portal_sow51_v_0-6-3.vsd, 10/11/2013

Section 1:

Functional Distribution

External Processes

- Submitted Leads to be reviewed before being accepted and assigned in SFDC.
- Existing Partner Portal User tables and Partner Data to migrated to new portal
- Existing Portal will remain active for a period time so Partners can view data
- All accepted Leads to be assigned in SFDC. Assigned drive by SFDC Rules. Each Market has different rules.
- EMEA - Submitted lead from the Portal to be sent to Info Group so that they can be fed into SFDC
- Develop rejection codes so that these codes can inform the Partner to why lead has been rejected
- Inbound Leads to be deduped in SFDC as per local logic
- EMEA Partner dedupe Logic will need to be created.
- Canada Partner Leads Process
- US Partners Lead Process
- JAPA Lead Process to processed via INFO Group

CMS

- Run targeted promotions within the Portal
- Promotion Page within the Portal. Promotional content to be triggered on Partnership Type. (This page is not a Mass Market Page)
- Use Sitecore DMS so content can be dynamic. Example Target certain Partnership with relevant Content.
- On boarding campaign that leverages Sitecore's DMS to serve dynamic content to new Partners.
- Understand incentive payments.
- Create specific Partner reports in the portal and save these report for the partner to view

Emails

- New Partnership request are to trigger an email to the local manager so that they can approve and complete the setup.
- Partner Managers need to know when a new Partnership request has been made
- Create Retention email Campaigns that are trigger by Local Partner Managers. Control by Eloqua
- Am I approved or not to become a Partner.
- Partner to receive an email if lead is accepted or Rejected
- Partner to receive an email when SFDC Opportunity is Won or Lost. Managed by Eloqua
- Sales to direct a future partner to sign up online. .

Administrative Pages

Admin Dashboard

Admin Detail Pages

- Approve all Partnership request so that these request have been verified at local level
- Add a partner easily and quickly
- Which partners are activity by Partner type and based on login(R&F)
- Message Centre to communicate with Partners
- View rejected leads by SFDC and have the ability to override and resubmit to SFDC.
- Transfer Leads under GCP Rev Limit to Open/SBS
- Track volume linked to partnerships won opps, reporting on new products (Cross Selling), Expansion volume. (MBC BCA)
- Log into the portal with admin rights to pull reports.
- Finance User to use the Portal to Track End to End Payments Activity
- Finance User to approve and pay Partner Incentives
- When setting up a new Partner that is a customer I would like to enter in customers CID to pre fill form via SFDC Account info.
- Ability to report on all and any Partner Activity by Region, Market and Type of partner.

Partners' Pages

- Each Partner Lead to have a unique lead key for tracking. Lead Key to stick with the record from Portal into SFDC and back.
- Manage their Partner Account with Amex
- Partner Subscription Centre to be housed inside Eloqua. (Marketing emails only)
- Include a Finance User role
- Include unique roles so that the portal understands how user is log into the portal

Partner Welcome

Partner Signup

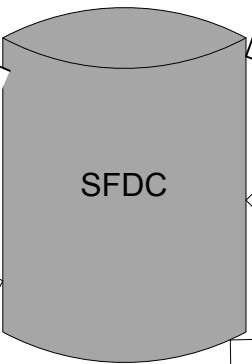
- Data fields will need to be localized to Market by Market
- View T&Cs and accept Partnership T&C's online. Also view these T&Cs when logged in.
- Partner Subscription Centre to provide control over marketing and Promo emails. Provide opt in email choices. Subscription Center to be house inside Eloqua
- All partner lead fields to be standardized globally

Partner Dashboard

- Submit Leads to AMEX. Each submit lead to have unique Lead Key number for tracking and linking back to Partner.
- View submitted referral activity

Partner Detail Pages

- Role base management of hierarchy of Partner users.
- Marketing and contact page post log in
- Portal to contain my T&Cs.
- Report on Activity and History so a local or region or global user can report on activity.
- Reporting to include all Lead activity including rejected leads not assigned to SFDC.
- See activity. By Activity, submit leads, status of qualified leads, Leads that were rejected.
- AO to see all activity from Partner (all users of that partner).
- Report on my incentive payments over a certain period of time.
- See and track incentive payments in real time
- I want a Member get Member Option. (Refer a Friend) One Time referral not need for a formal partnerships



Section 2:

Persona Definitions



Partner

“Partner” refers to Sales Person at a 3rd-party company who is compensated for referring new customers to American Express. In some cases in this document, “Partner” may also refer to the company itself.

Primary Objective: A Partner want to be able to quickly submit new leads to American Express and see the status of already-submitted leads.



Authorizing Officer

The “Authorizing Officer” is the primary contact within a Partner company. They have all the same access that the Partner persona has, plus they can also manage their company’s other users access and leads. A user becomes an “AO” either by being the individual who signed up on behalf of their company or the Partner Manager manually assigned them the role.

Primary Objective: A Partner also wants to be able to quickly submit new leads to American Express and see the status of already-submitted leads.

Secondary Objectives: Manage other users’ permissions and monitor the status of other users’ leads.



Partner Manager

“Partner Manager” refers to an internal an American Express employee who manages the relationships with the local partners within their region.

Primary Objectives: A Partner Manager want to be able to easily review leads which have been rejected and make modifications to that lead information and resubmit them. It is in the best interest of that Partner Manager for leads to be accepted. They also need to monitor requests from companies to become new partners and, after offline negotiations and contract signing, approve or deny such requests.

Secondary Objective: Manage existing Partners and work with AO’s through various issues.

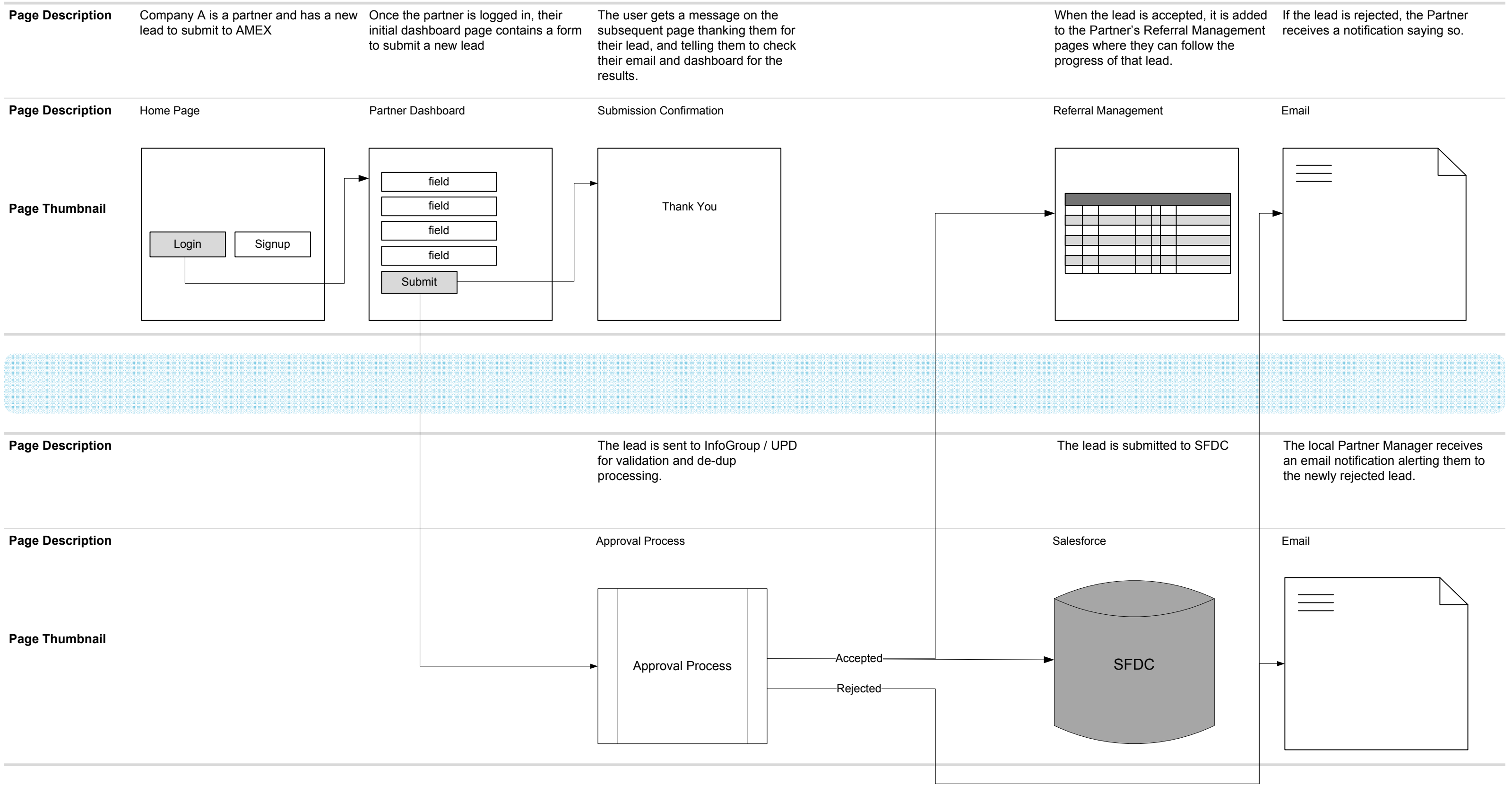
Section 3:

Process Flows



Use case: Submit Lead

Primary Persona: Partner User





Use case: Partner Manager Resubmitting a lead for Approval

Primary Persona: Local Partner Manager

Page Description	A Local Partner Manager logs into the portal to review the status of various partners and leads.	Once the user is logged in, their initial home page contains a number of tables – at least one of which reflects rejected leads.	The Partner Manager drills into the overview report to see a more detailed report	The user can drill even further into the details of a particular lead within the submission form, in order to adjust some of the data so it can be resubmitted.	The lead is re-submitted to InfoGroup / UPD for review and processing.
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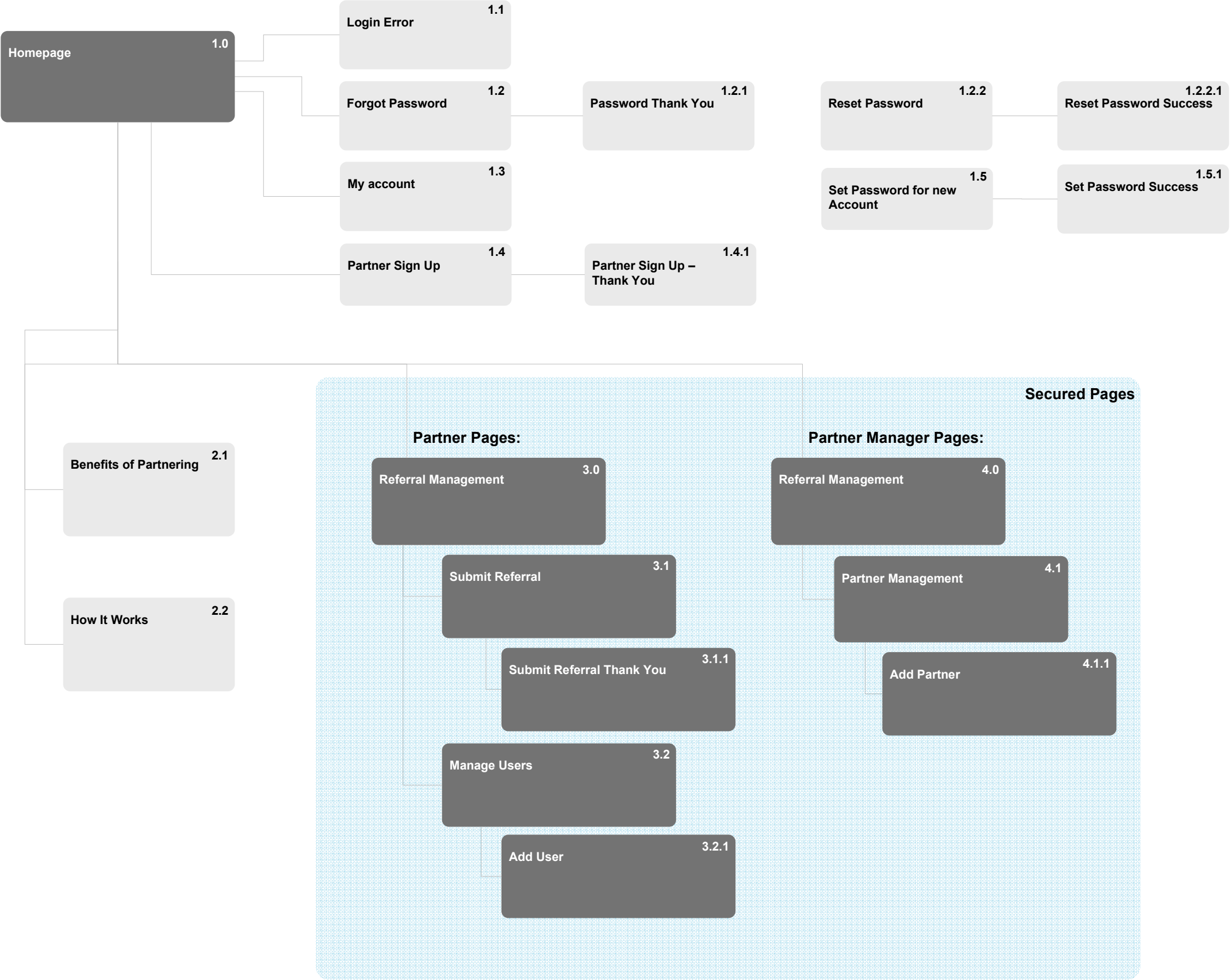
Page Description

Page Description

Page Thumbnail

Section 4:

Site Map



Key

Primary Page

Utility Page

Secondary Page

Content Module

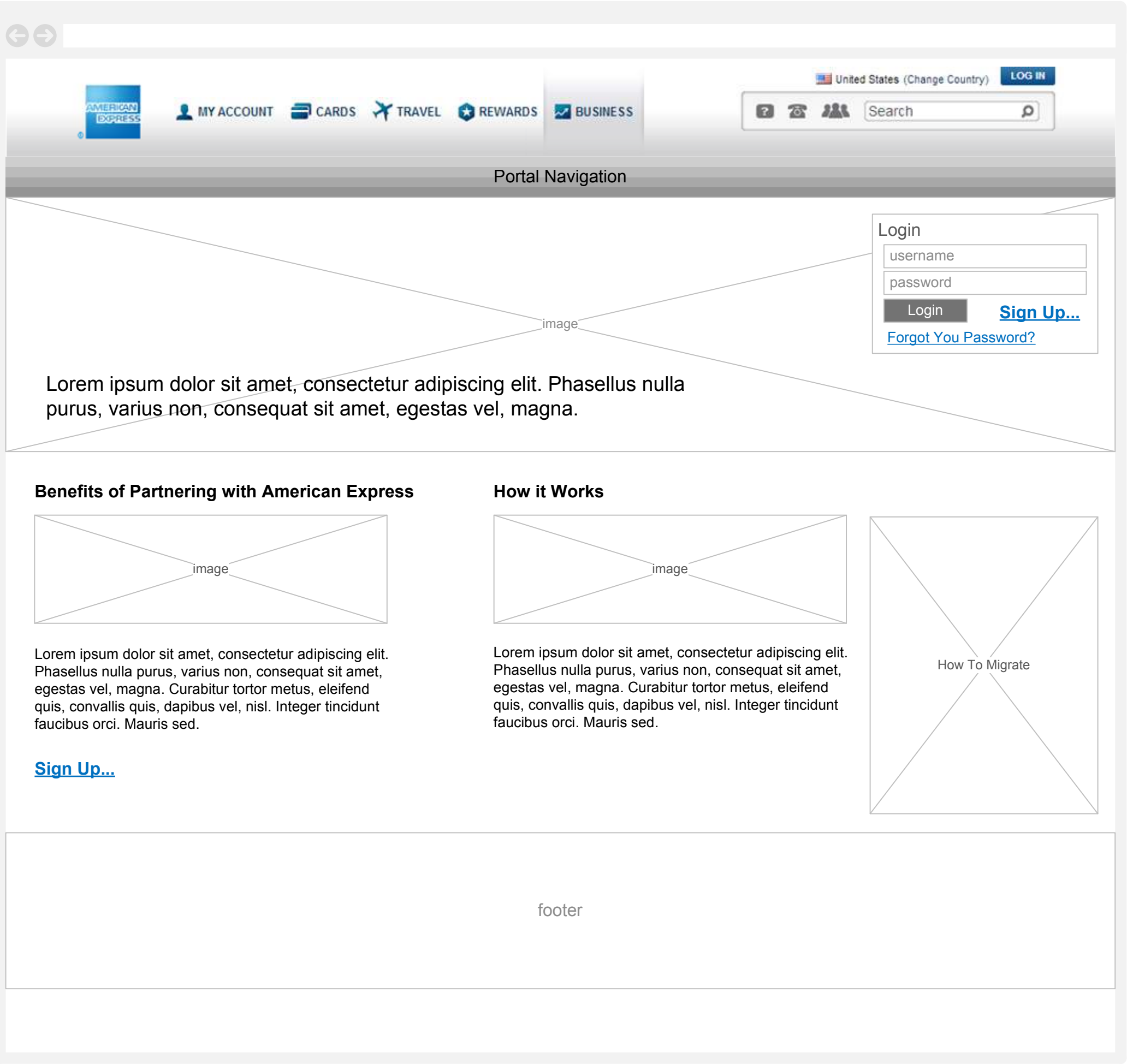
Content needs to be developed

Hierarchical Navigation

Cross-Linked Navigation

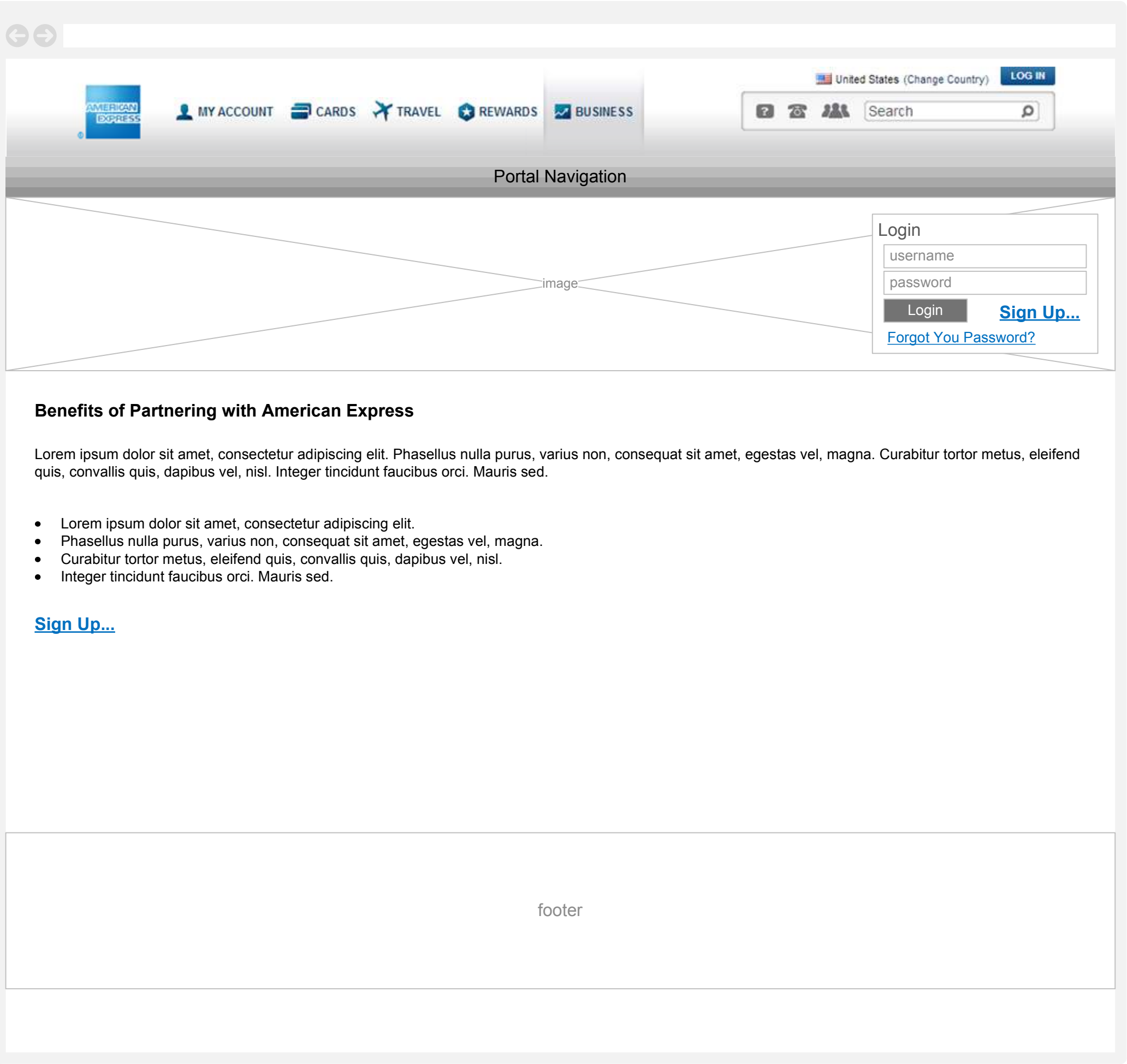
Section 5:

Wireframes



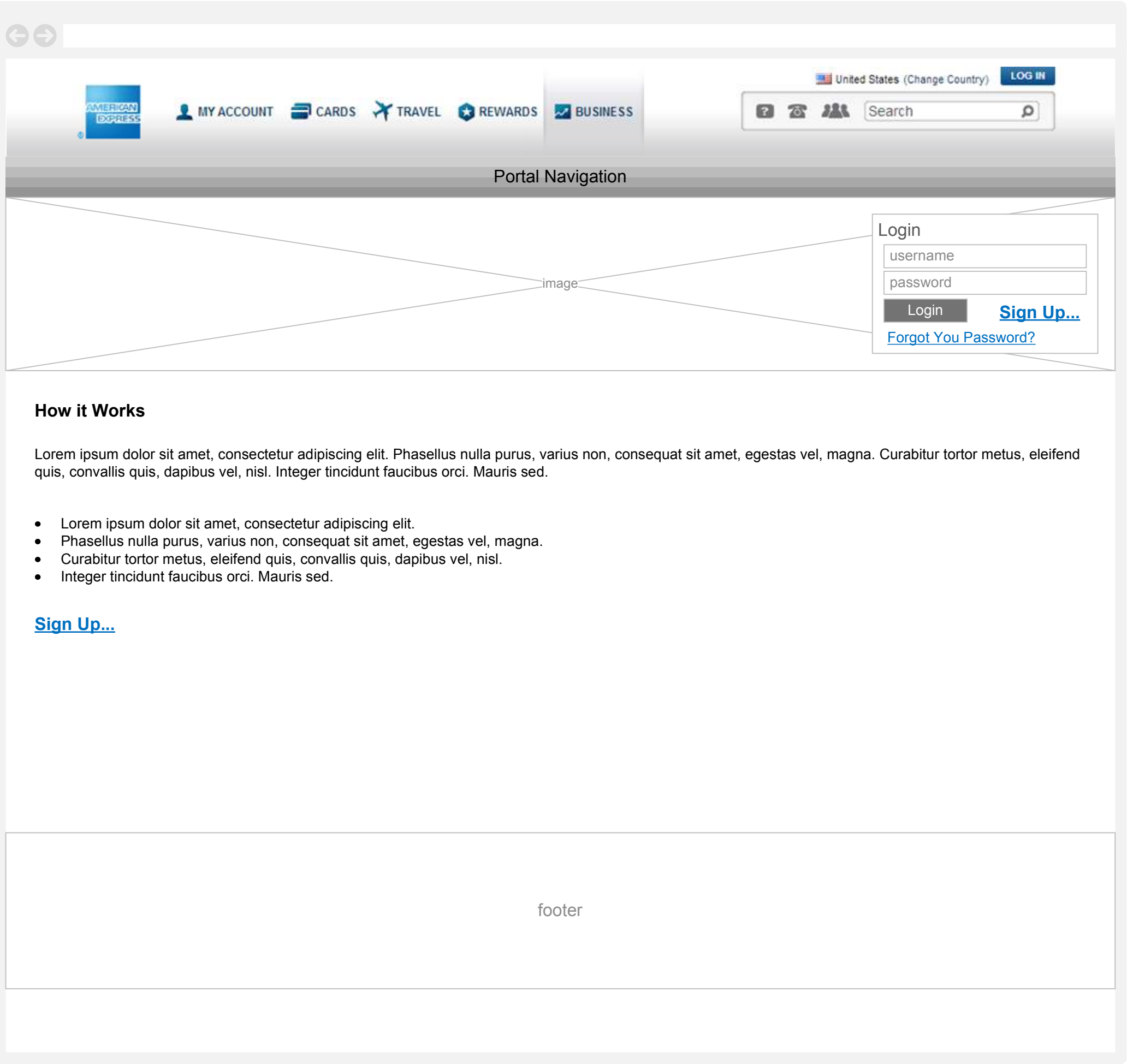
Annotations

Persona: All
Site Map Page: 1.0



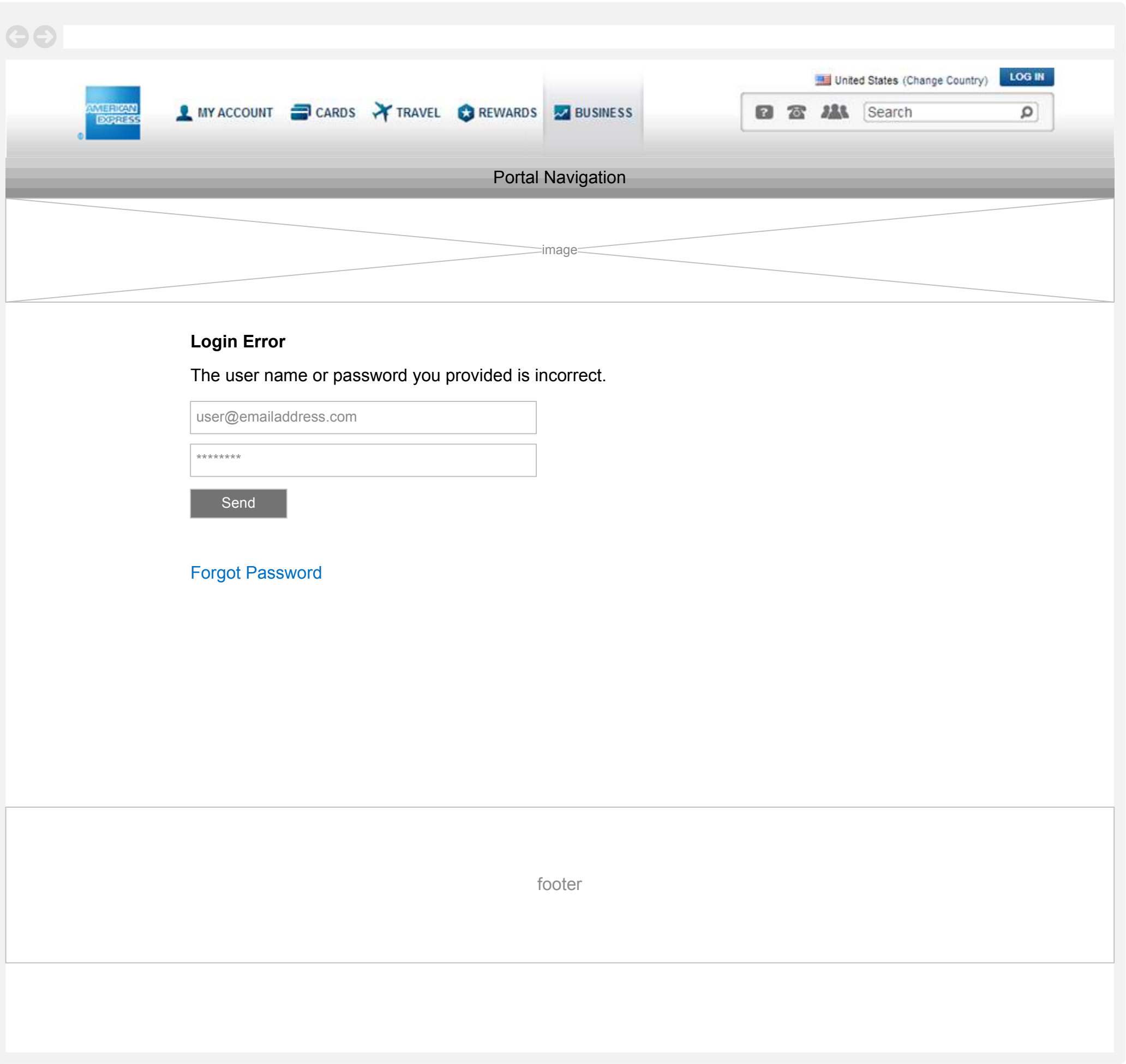
Annotations

Persona: All
Site Map Page: 2.1



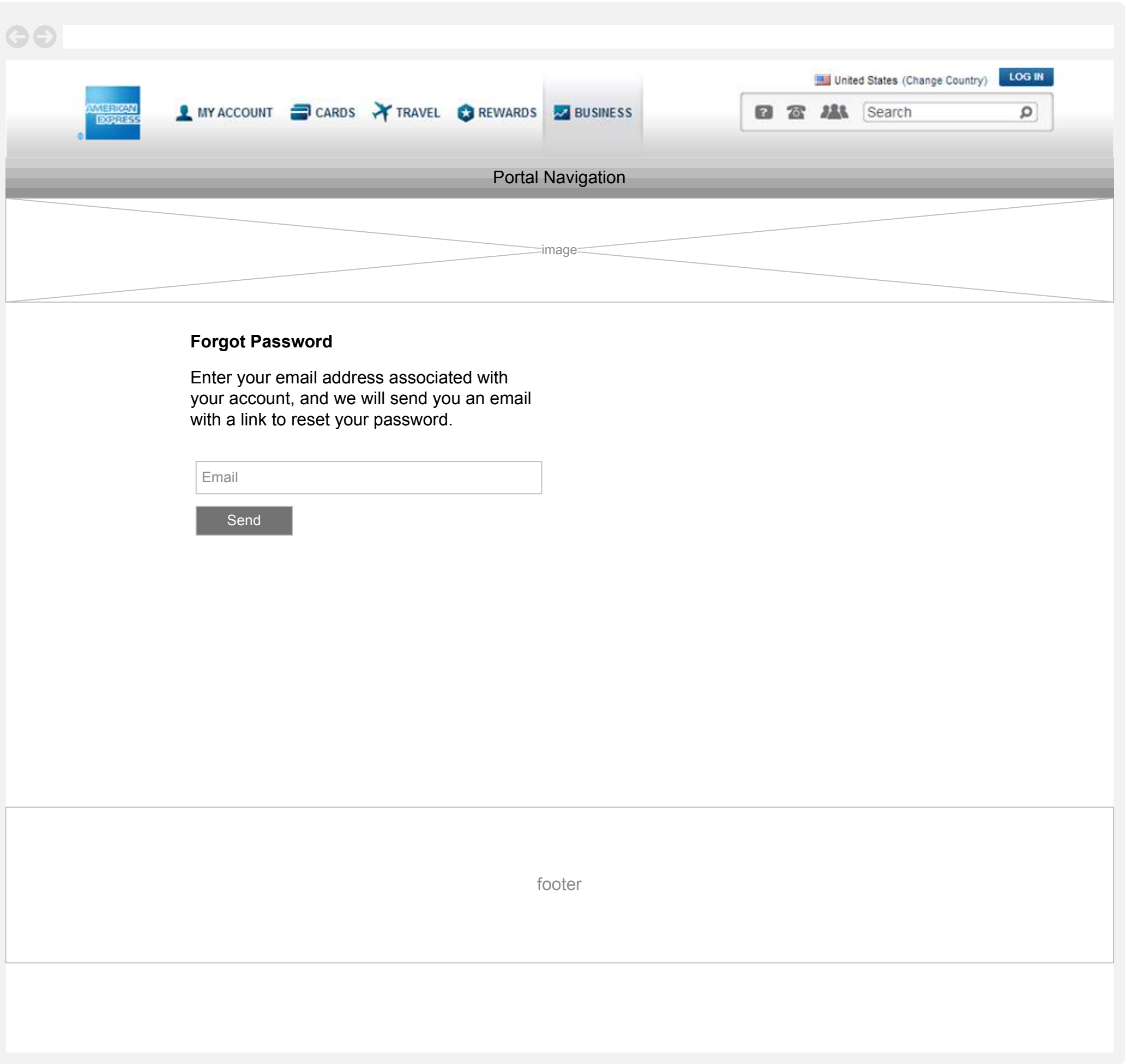
Annotations

Persona: All
Site Map Page: 2.2



Annotations

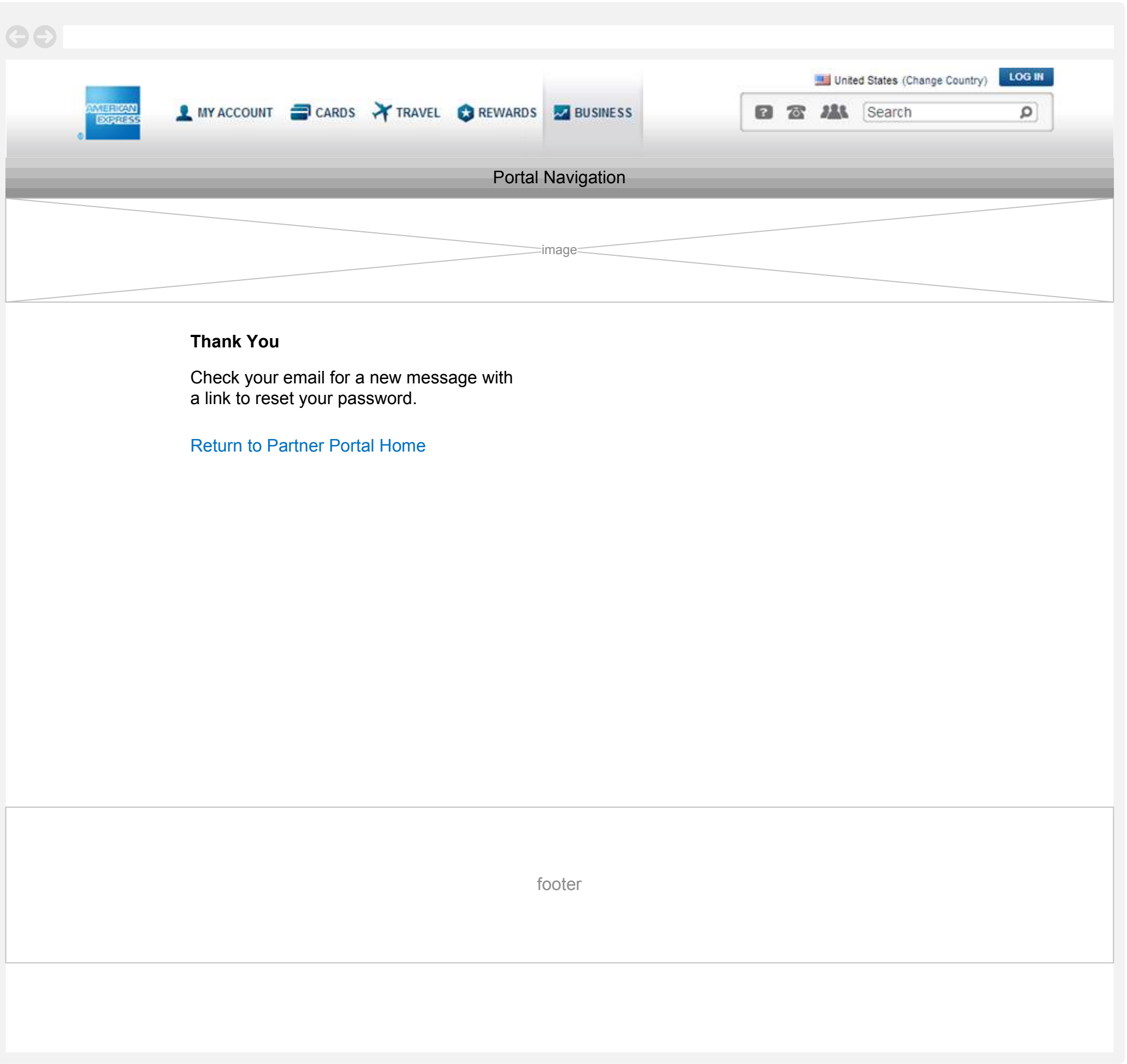
Persona: All
Site Map Page: 1.1



Annotations

Persona: All

Site Map Page: 1.2



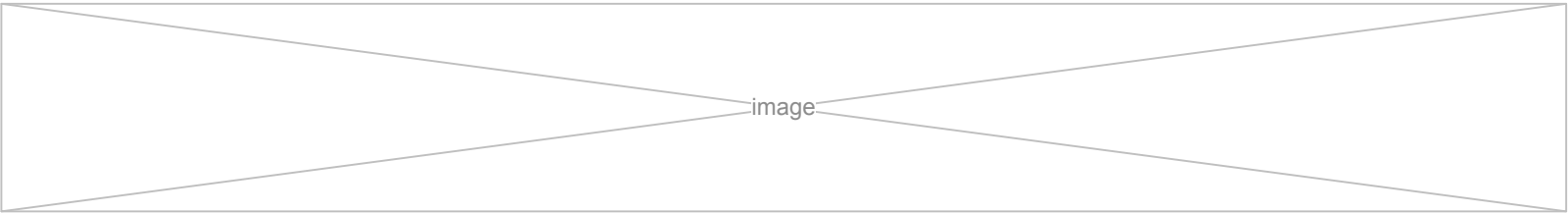
Annotations

Persona: All

Site Map Page: 1.2.1

Annotations

Persona: All



Dear John Doe,

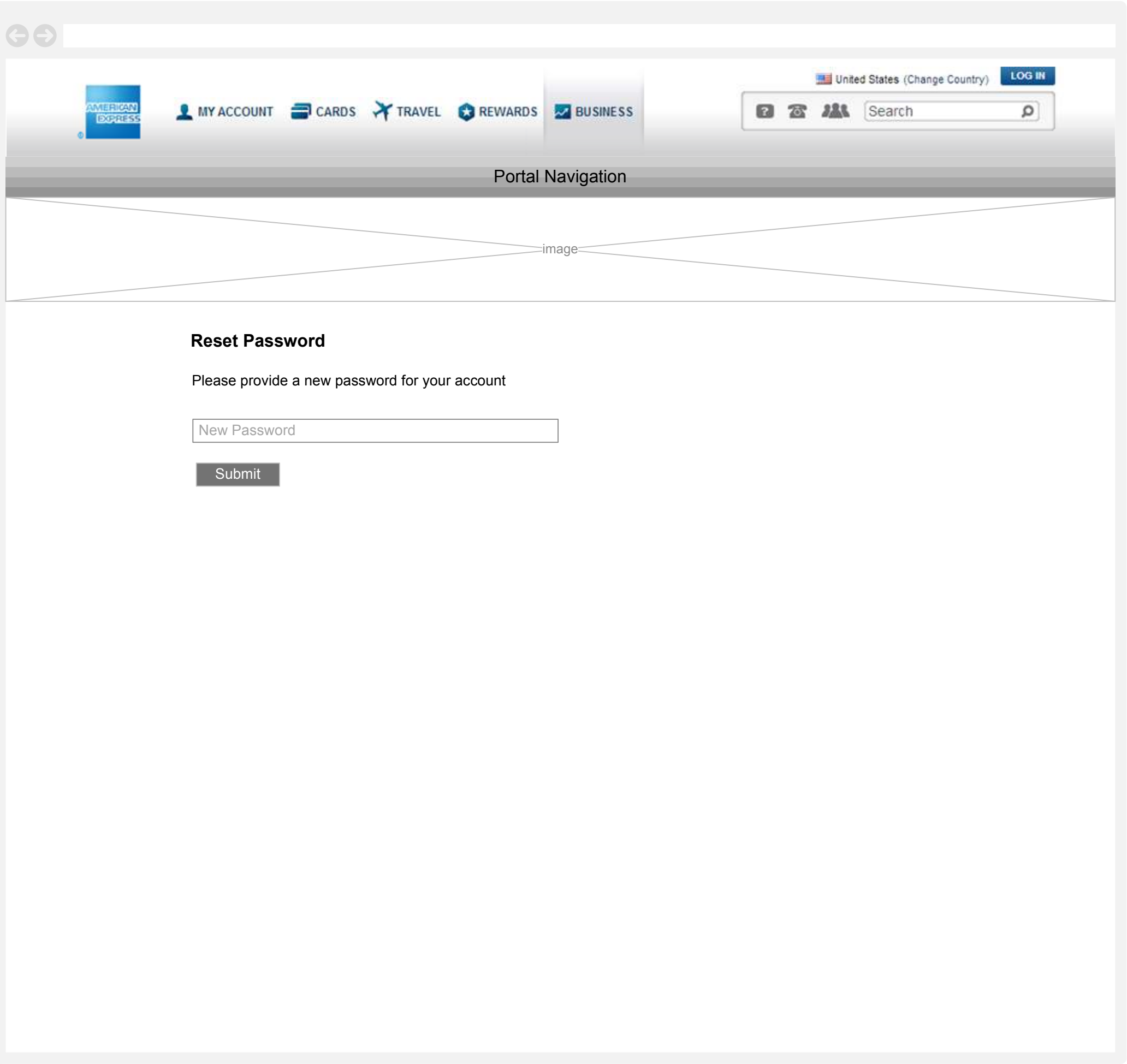
You have requested a password reset for your American Express Partner Portal account.

Click the following link and you will be prompted to create a new password.

If you received this email in error, or you did not request a new password, please disregard this message.

<http://url>

Thank you,
American Express Partner Portal Team



Annotations

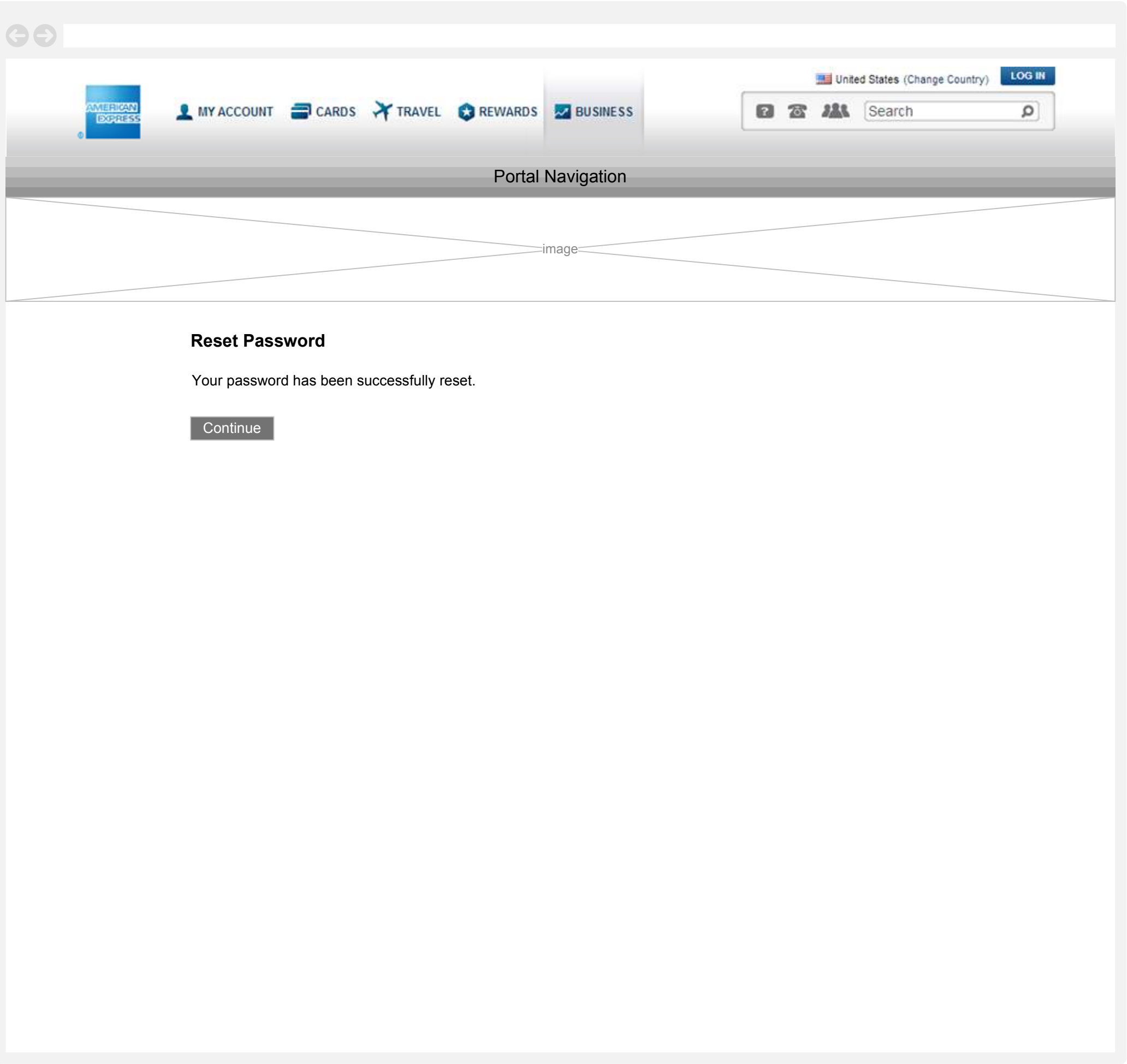
Persona: All
Site Map Page: 1.2.2

If the user submits an invalid password, the error message appears below the instructions, and the field is highlighted as an error as illustrated below.

Reset Password

Please provide a new password for your account

Your password must be at least 8 characters long and meet other requirements



Annotations

Persona: All
Site Map Page: 1.2.2.1

“Continue” directs the user to the My Account page, or to the Referral Management page if this is the first time the user is logging in (see *Email: New Partner Account Notification* page)

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Portal Navigation

image

Sign Up

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

All fields are required unless otherwise indicated

Primary Contact Information:

Email Address (this will be your login User ID)

First Name

Last Name

Phone Number

Comments (Optional)

Company Information

Company Name

Type of Partnership (Optional)

Street Address 1

Street Address 2 (if applicable)

Street Address 3 (if applicable)

City

Postal Code

Country

☐ I agree to the [Terms & Conditions](#) of this website

☐ I would like to receive emails from American Express regarding promotions and programs.

Submit

Annotations

Persona: (Potential) Partner Site Map Page: 1.4

Will address fields change per county, or will there be a single superset?
If the latter, which fields will that include, and which are required?

Dropdown Field Values:

Type of Partnership:

TBD

Country:

UK

Germany

France

Spain

Italy

Netherlands

Sweden

Denmark

If the user fails to complete required fields or invalid data, the error message appears below the instructions, and the field is highlighted as an error as illustrated below.

Sign Up

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

All fields are required unless otherwise indicated

Please provide your Street Address

Primary Contact Information:

Email Address (this will be your login User ID)

First Name

Last Name

Company Information

Company Name

Type of Partnership (Optional)

Street Address 1



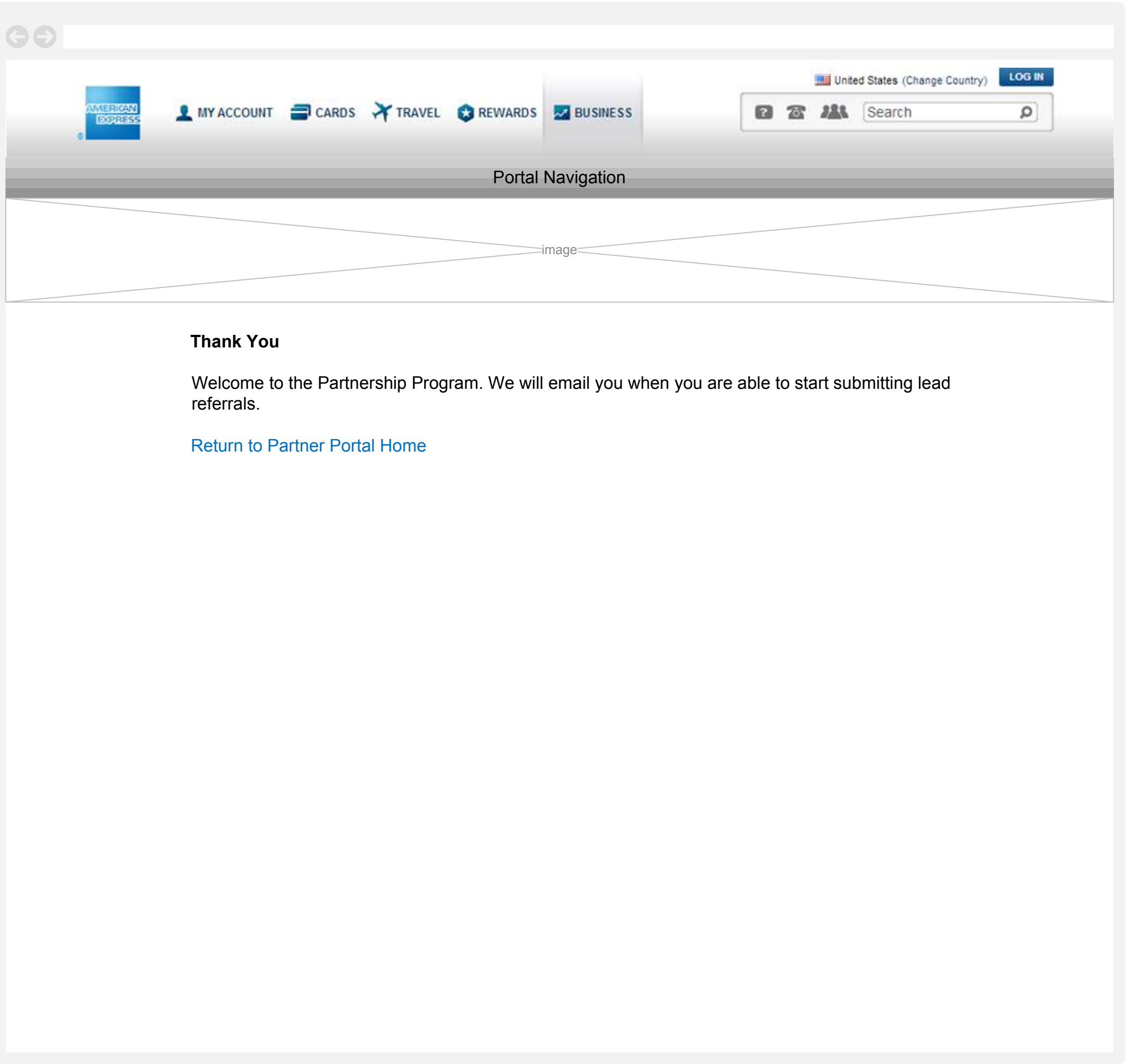
LOG IN



=image

Denmark

Denmark



Annotations

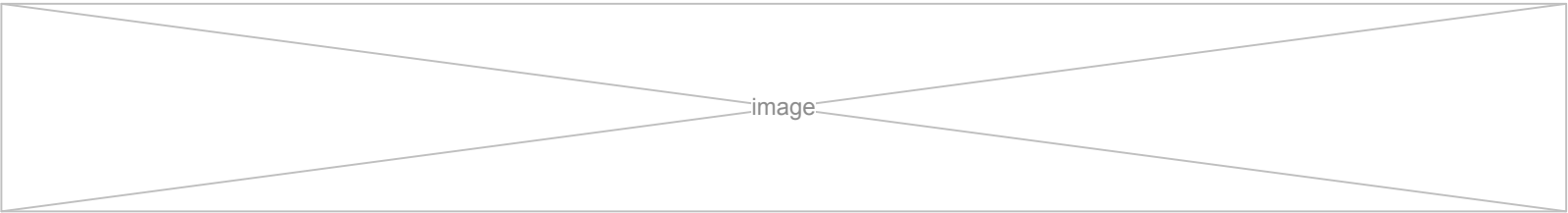
Persona: (Potential) Partner

Site Map Page: 1.4.1

Annotations

Persona: Partner

When a new Partner is approved, an email notification is sent telling them so. That email contains a link to a Set New Password page.

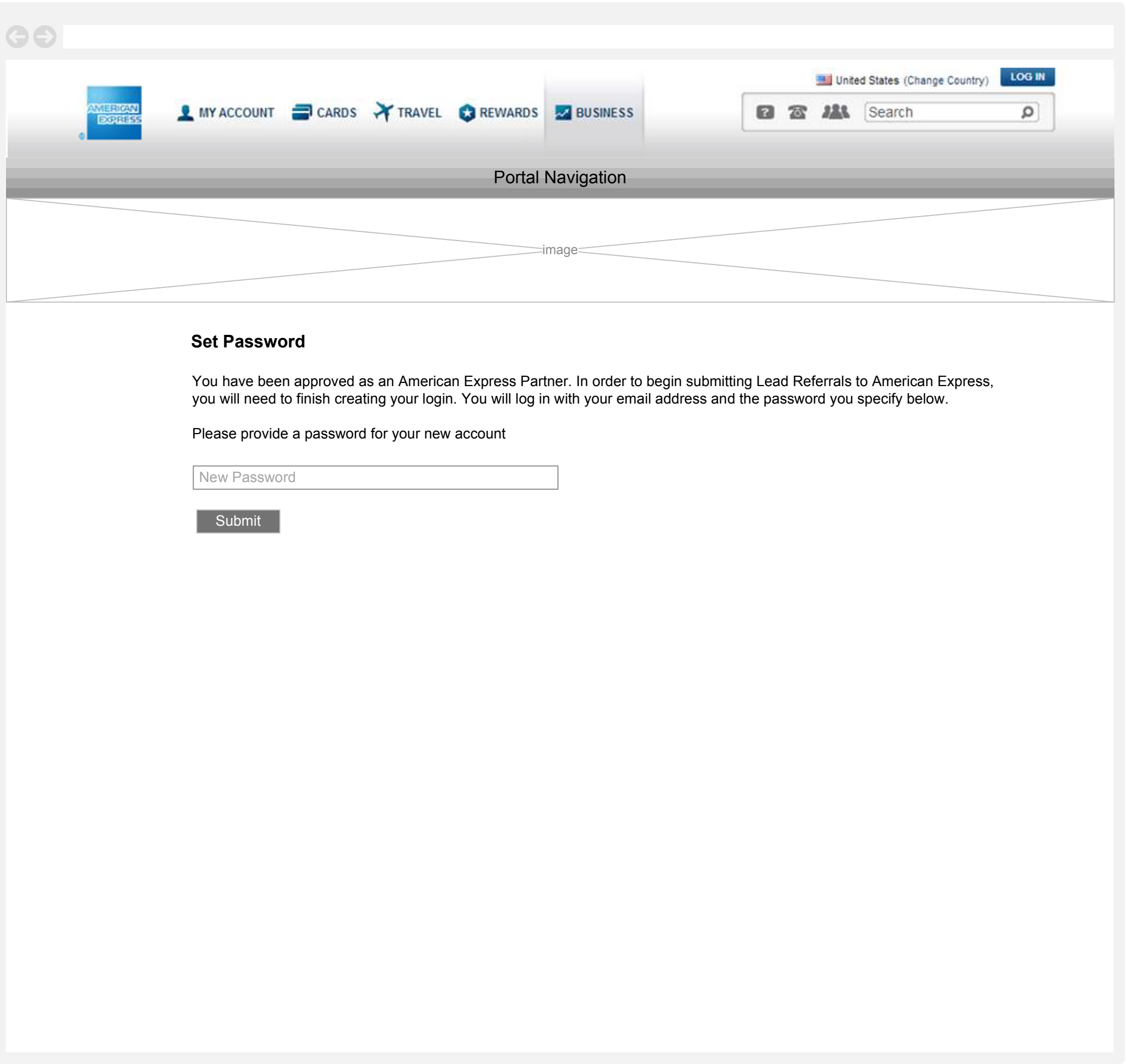


Dear John Doe,

Thank you for your recent Partner Portal request. We have reviewed your request, and would like to congratulate you on becoming an American Express Business Partner.

[Create a password for your account and start submitting referrals now.](#)

Thank you for your interest,
American Express Partner Portal Team

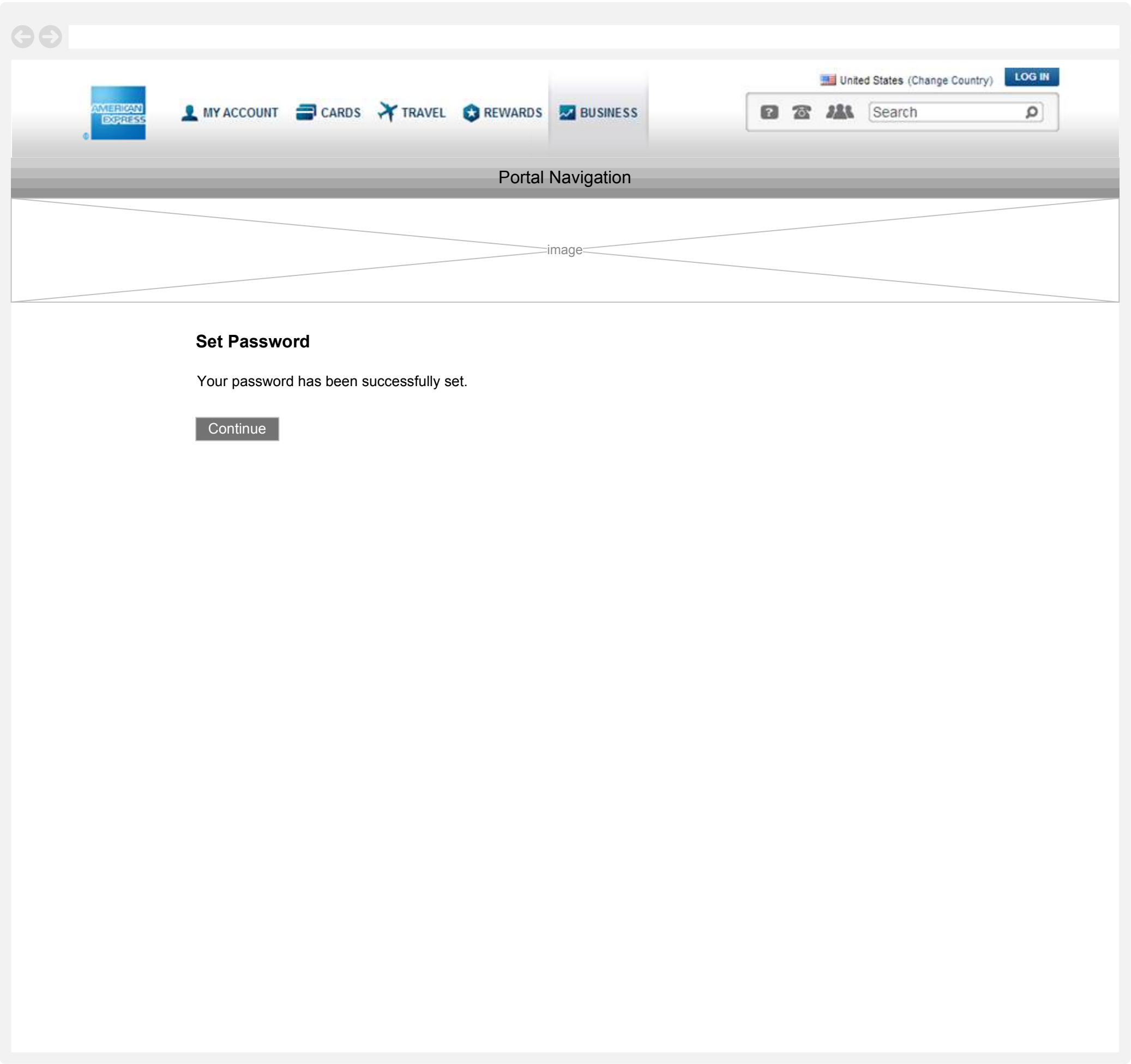


Annotations

Persona: (New) Partner

Site Map Page: 1.5

When a new Partner is approved, an email notification is sent telling them so. That email contains a link to this page where they establish a new password for their account.



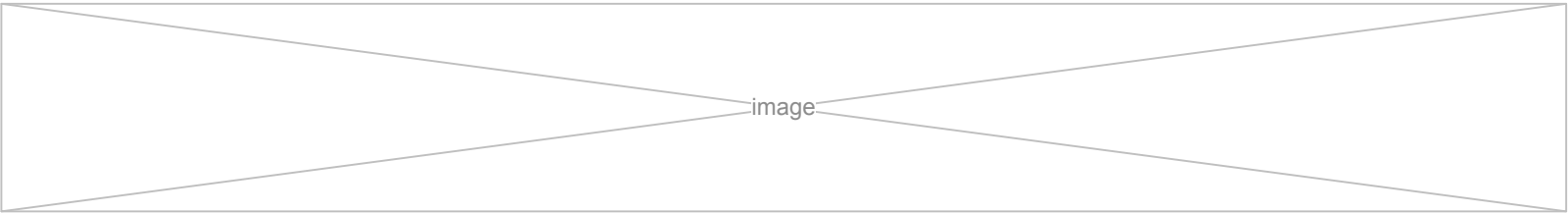
Annotations

Persona: (New) Partner
Site Map Page: 1.5.1

“Continue” directs the user to the Referral Management page.

Annotations

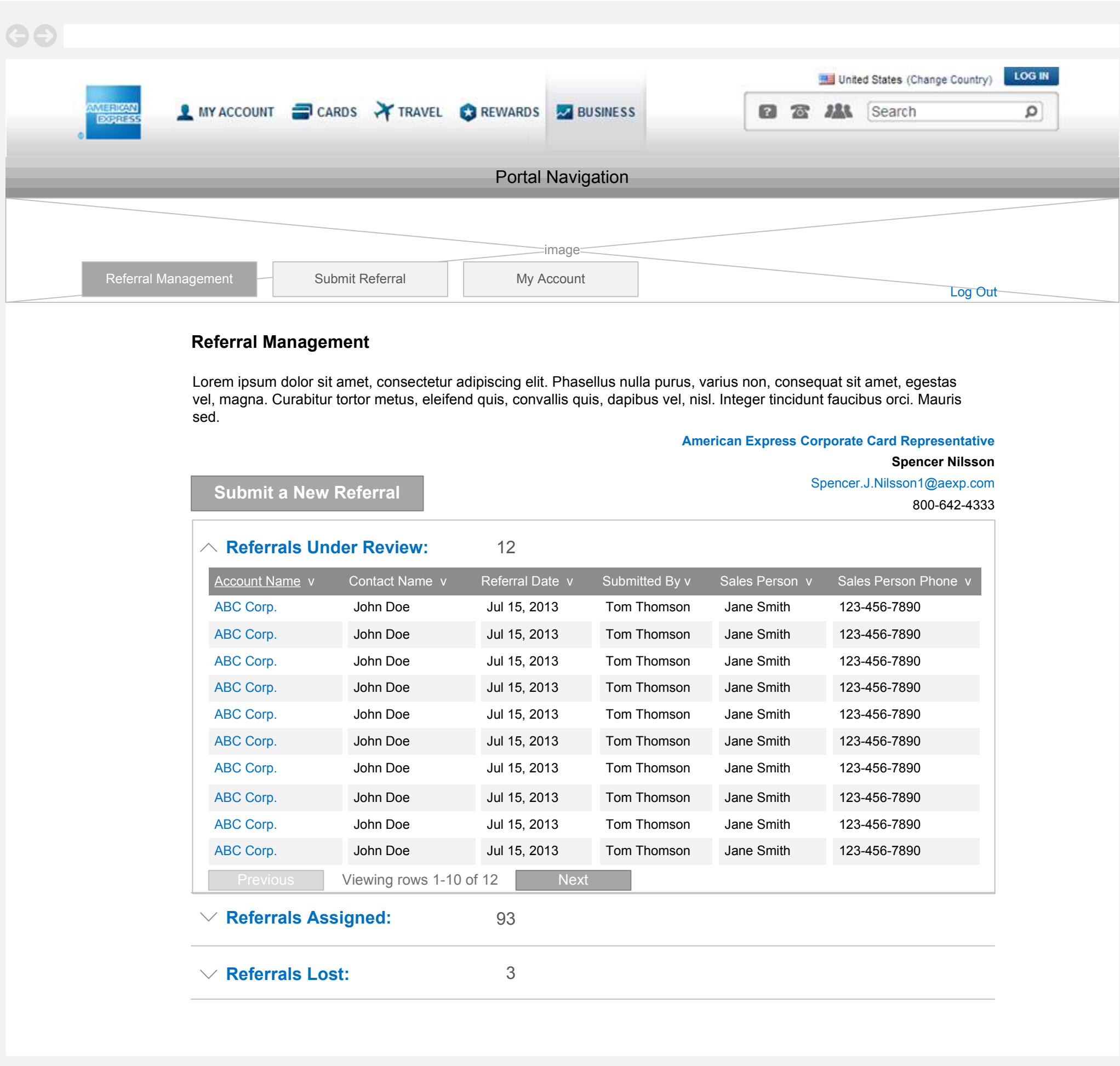
Persona: (Would-be) Partner



Dear John Doe,

Thank you for your recent Partner Portal request. Unfortunately, we are unable to accept your application at this time.

Thank you for your interest,
American Express Partner Portal Team



Annotations

Persona: Partner (AO) Site Map Page: 3.0

The Partner Home page is this Referral Management Page. The partner can review submitted lead referrals, as well as the accepted, and lost referrals. The “Submitted By” column is only visible to the AO, so they can see Referrals by employee. This column is in all three tables of this page.

Tables should display no more than **10** records on page load, but the height of the table may be shorter and include a vertical scroll bar. Below the 10th row, is a button to load the next **20**. The contents of the table are replaced. It should not become an infinite scrolling experience for the sake of mobile devices controlled by touch, and because it is not a browsing-type experience.

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Search

Portal Navigation

Referral Management

Submit Referral

My Account

Log Out

Submit a New Lead Referral

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All fields are required unless otherwise indicated

Company Name

Company Division *(optional)*

Company Street Address 1

Company Street Address 2 *(if applicable)*

Company Street Address 3 *(if applicable)*

Company City

Company Postal Code

Company Country

Germany

Company Registration Number *(if applicable)*

Additional information

Submit

Contact First Name

Contact Last Name

Contact's Title

Contact's Position

Contact's Telephone Number

Contact's Email Address

Annual Company Revenue *(optional)*

Annual Travel Spend *(optional)*

Product of Interest *(optional)*

Exisiting Competitor Products *(optional)*

Annotations

Persona: Partner Site Map Page: 3.1

Company Country field is automatically populated, based on the Partner's country, and is read only

Dropdown Field Values:

Product of Interest:
American Express Corporate Card
Business Travel Account (BTA)
American Express Corporate Meeting Card
American Express Corporate Purchasing Card
vPayment
Unknown
Other

Annual Company Revenue:
\$500,000 - \$999,999
\$1 Million - \$3.99 Million
\$4 Million - \$9.99 Million
\$10 Million - \$250 Million
\$251 Million - \$2 Billion
Over \$2 Billion

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Search

Portal Navigation

Referral Management

Submit Referral

My Account

Log Out

Submit a New Lead Referral

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci.

All fields are required unless otherwise indicated

Company Name

Company Division (optional)

Company Street Address 1

Company Street Address 2 (if applicable)

Company Street Address 3 (if applicable)

Company City

Company Postal Code

Company Country

Germany

Company Registration Number (if applicable)

Additional information

Submit

Contact First Name

Contact Last Name

Contact's Title

Contact's Position

Contact's Telephone Number

Contact's Email Address

Annual Company Revenue (optional)

\$500,000 - \$999,999

\$1 Million - \$3.99 Million

\$4 Million - \$9.99 Million

\$10 Million - \$250 Million

\$251 Million - \$2 Billion

\$2 Billion Referral Plus

Product of Interest (optional)

American Express Corporate Card

Business Travel Account (BTA)

American Express Corporate Meeting Card

American Express Corporate Purchasing Card

vPayment

Unknown

Other

Annotations

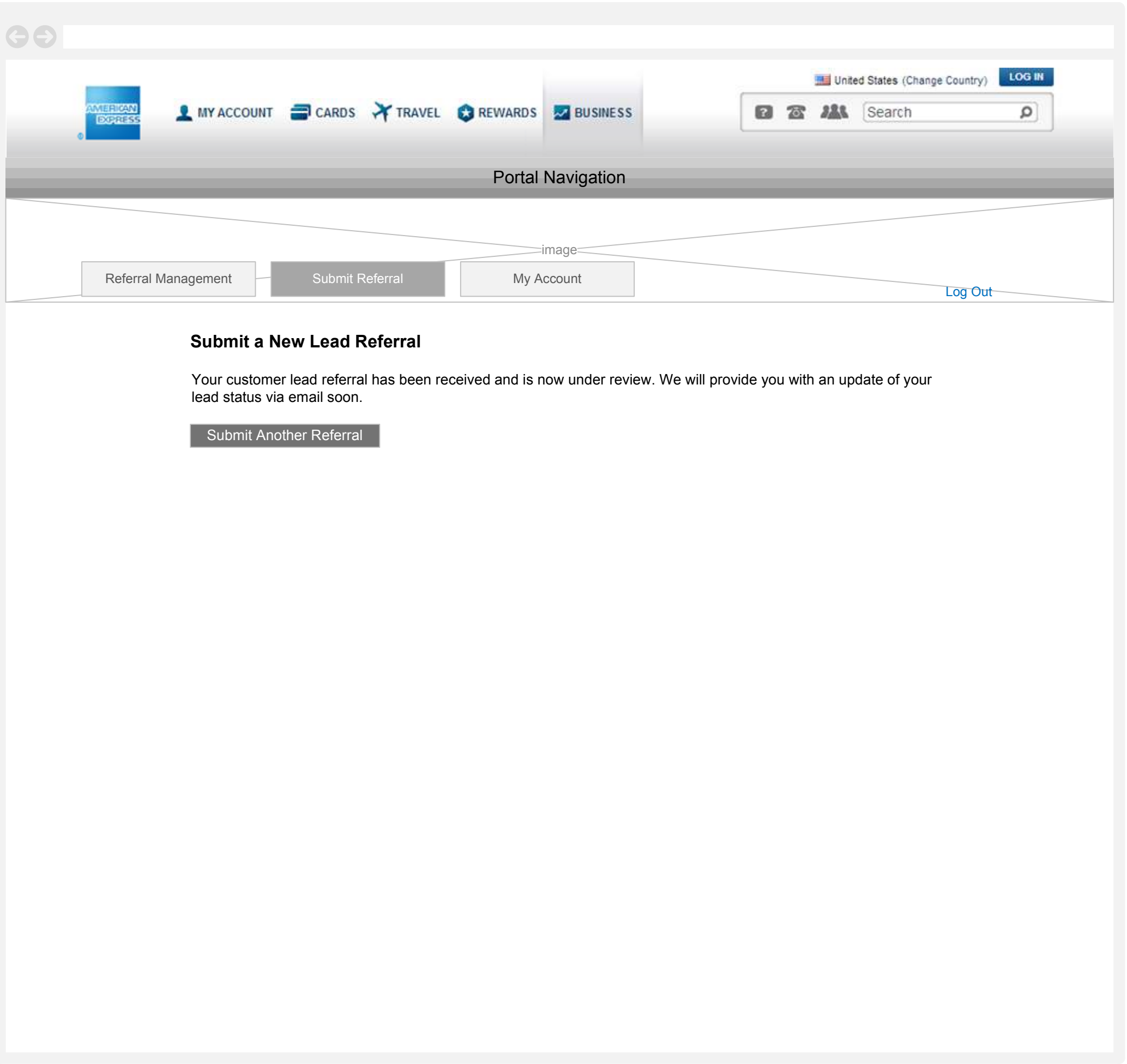
Persona: Partner Site Map Page: 3.1

Company Country field is automatically populated, based on the Partner's country, and is read only

Dropdown Field Values:

Product of Interest:
American Express Corporate Card
Business Travel Account (BTA)
American Express Corporate Meeting Card
American Express Corporate Purchasing Card
vPayment
Unknown
Other

Annual Company Revenue:
\$500,000 - \$999,999
\$1 Million - \$3.99 Million
\$4 Million - \$9.99 Million
\$10 Million - \$250 Million
\$251 Million - \$2 Billion
Over \$2 Billion



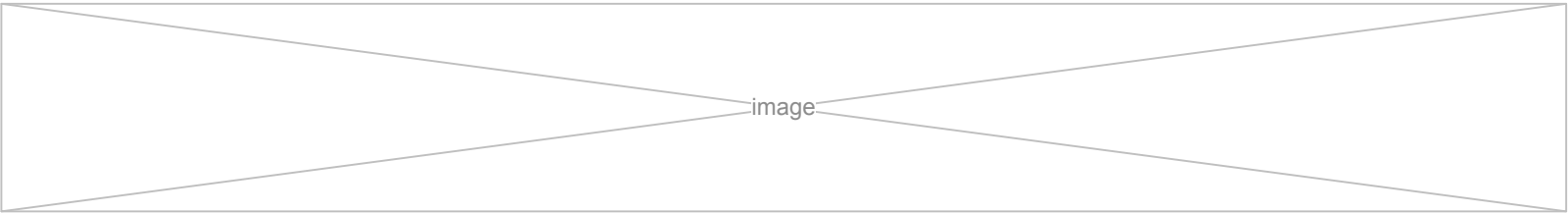
Annotations

Persona: Partner
Site Map Page: 3.1.1

Upon a successful submission, the New Lead form is replaced with a “Thank You” message and a button to submit another lead referral.

Annotations

Persona: Partner



Dear Steve Smith,

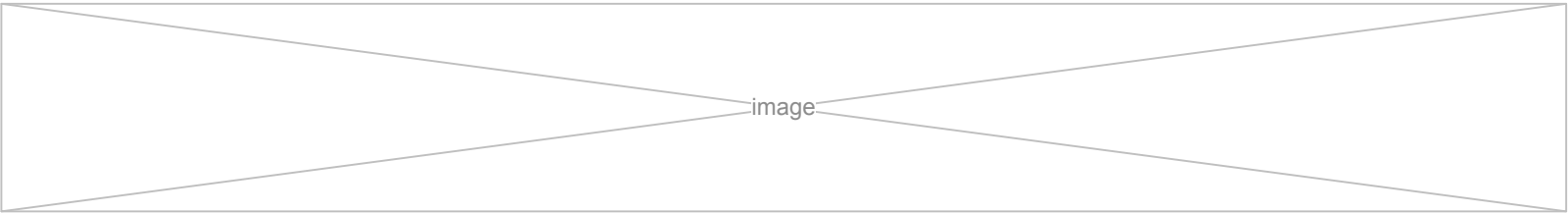
Thank you for your recent customer referral, **John Doe**. Your referral has been received and is being reviewed

[Track the progress of this lead via the portal.](#)

Thank you for your interest,
American Express Partner Portal Team

Annotations

Persona: Partner



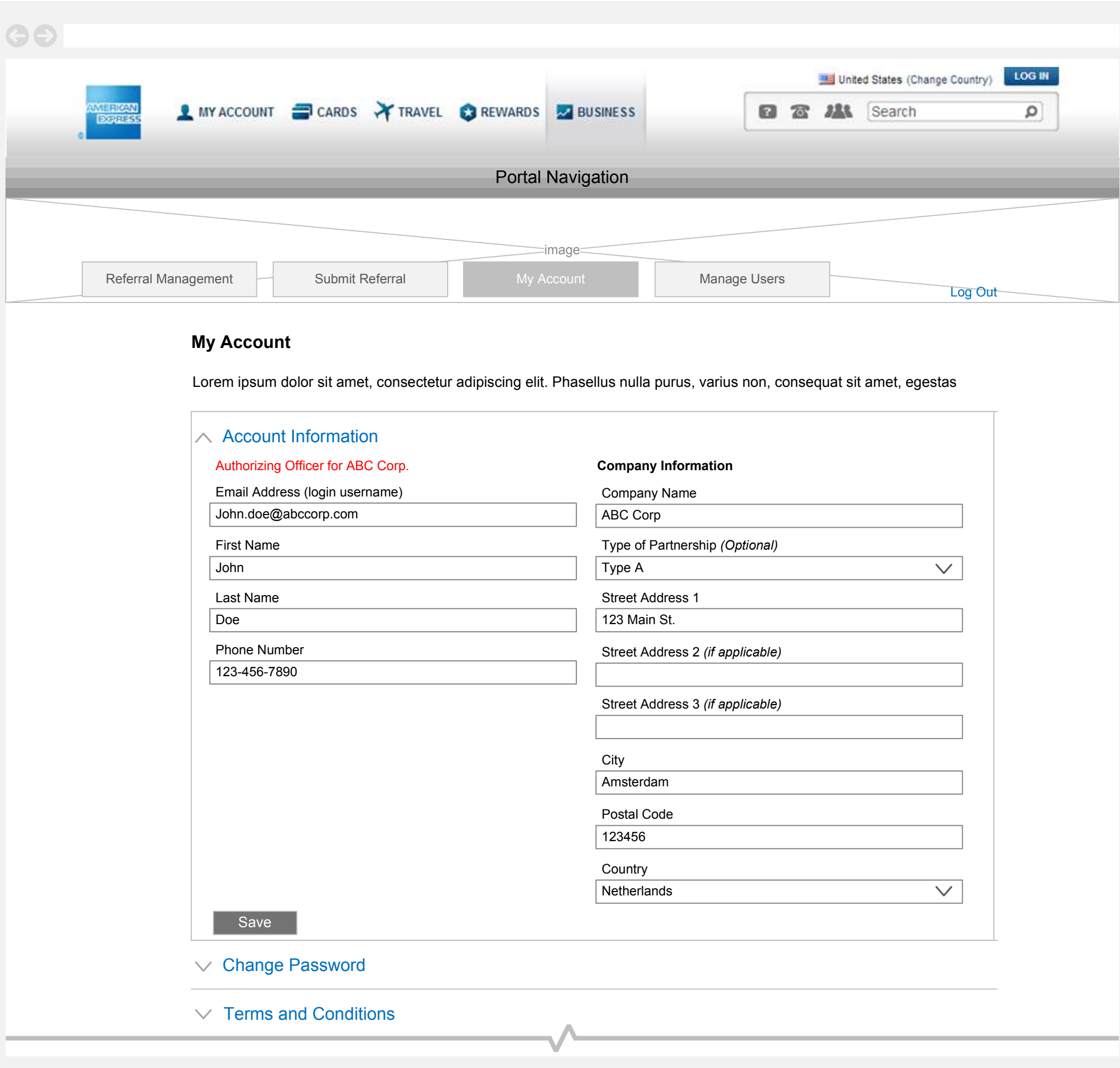
Dear Steve Smith,

Thank you for your recent customer referral, **John Doe**. Unfortunately, we are unable to accept this referral at this time because of the following reason(s):

Insufficient annual revenue

If you have any questions about this matter, you may contact your local Partner Manager.

Thank you for your interest,
American Express Partner Portal Team

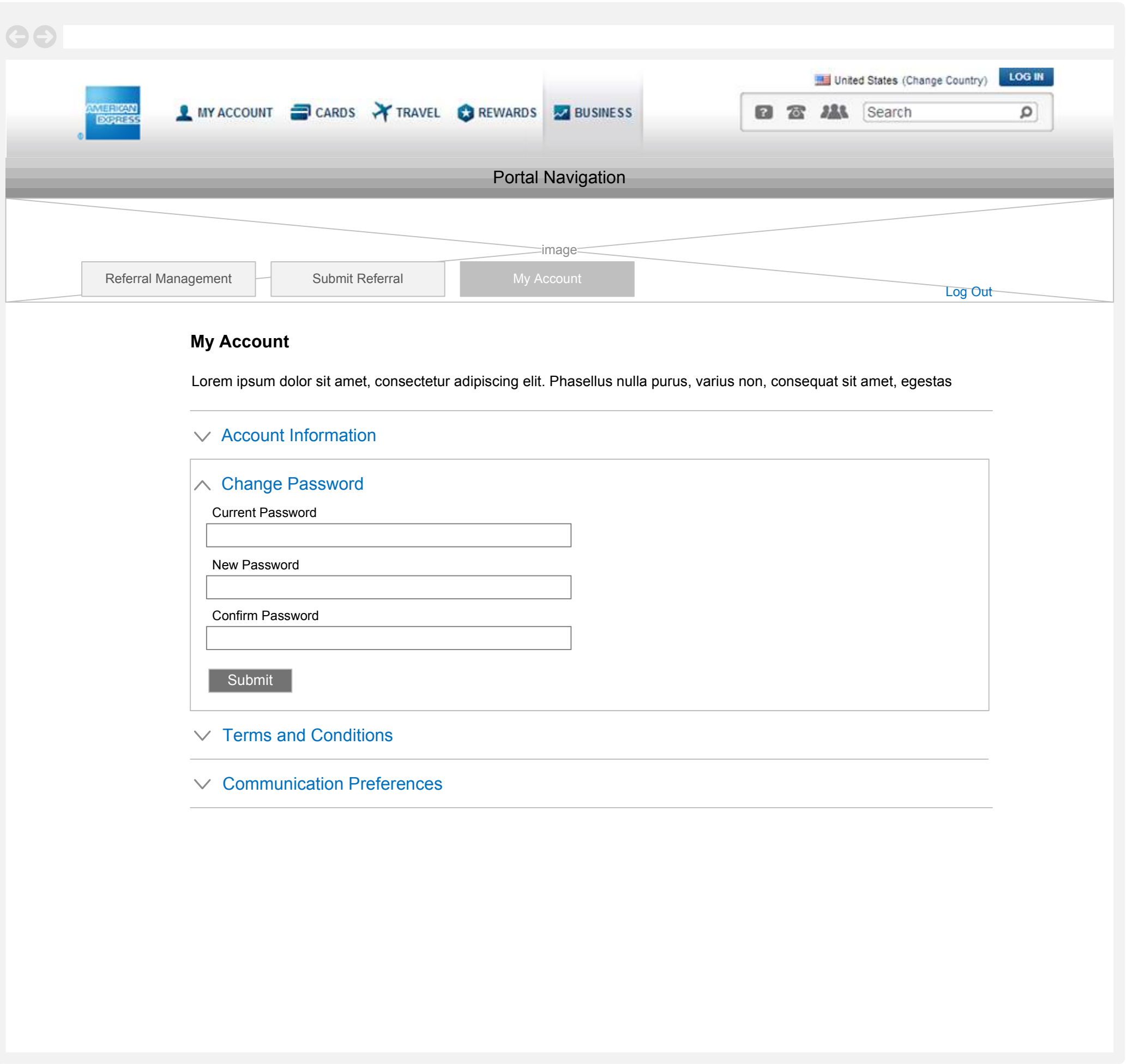


Annotations

Persona: AO Site Map Page: 1.3

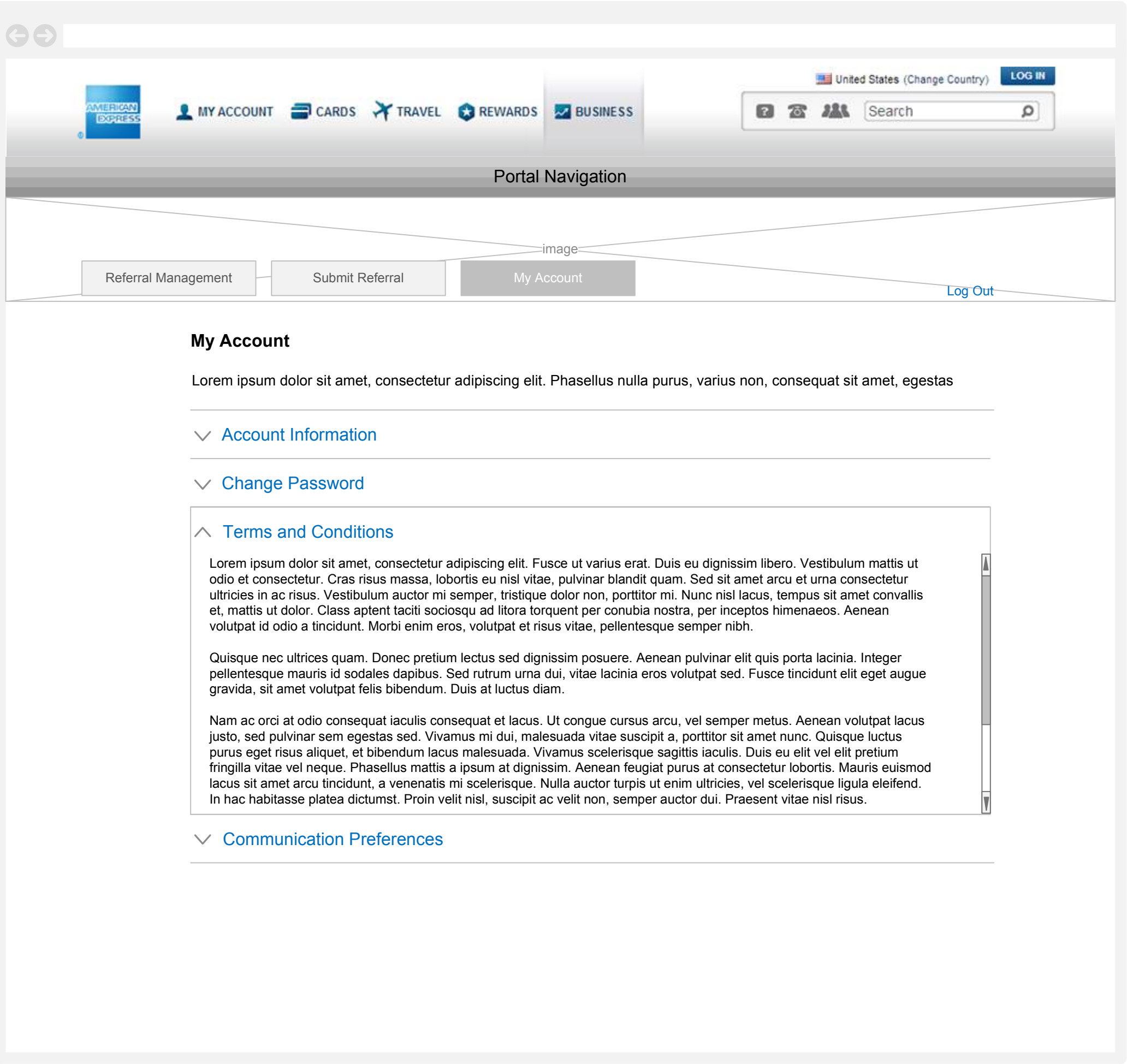
The My Account page is where the partner manages all personal information related to their account. The Account Information is open be default.

Only the AO has the Company Information form fields as only they can modify that information. Non-AO partners would have only the left-side fields.



Annotations

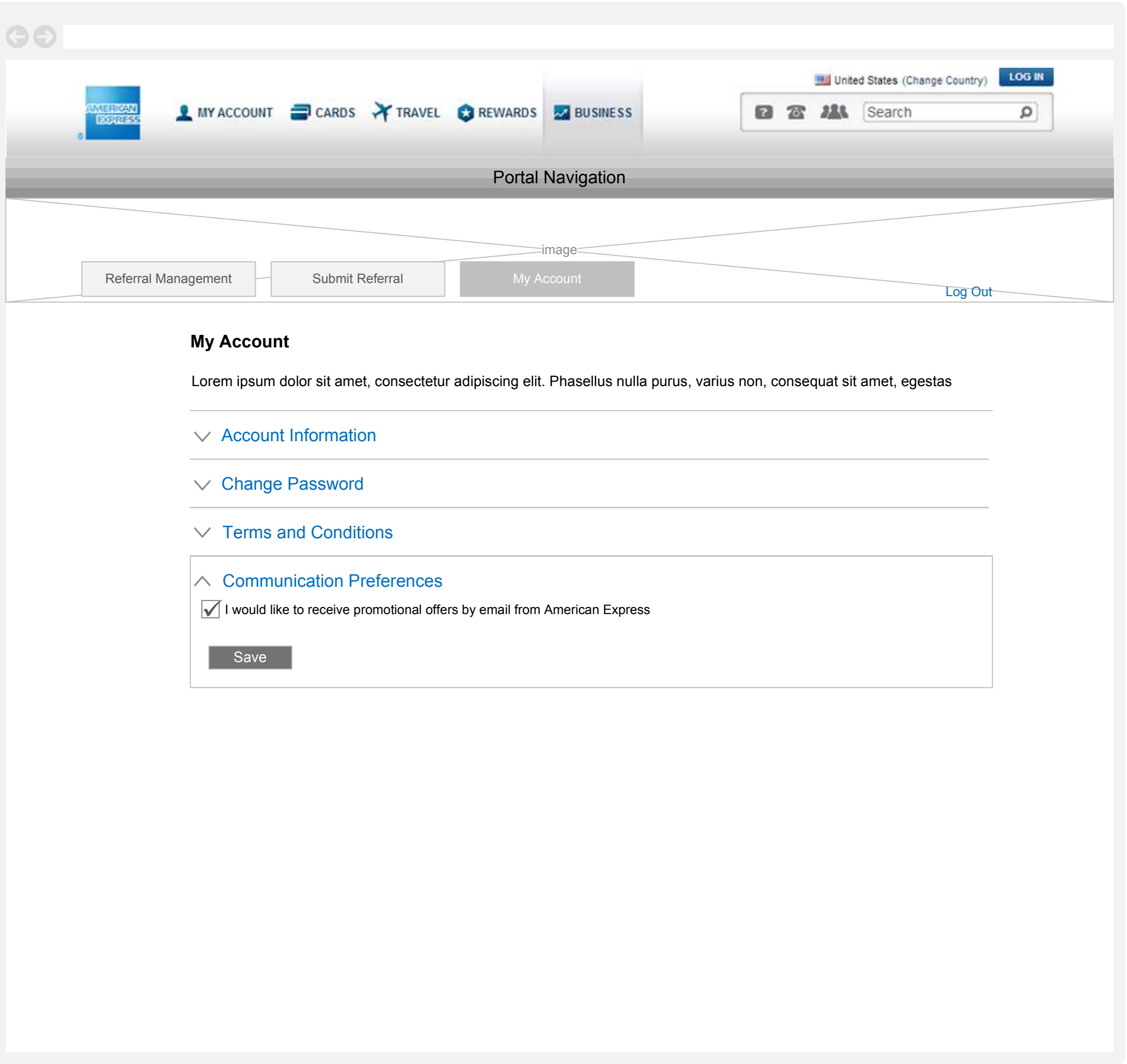
Persona: Partner
Site Map Page: 1.3



Annotations

Persona: Partner
Site Map Page: 1.3

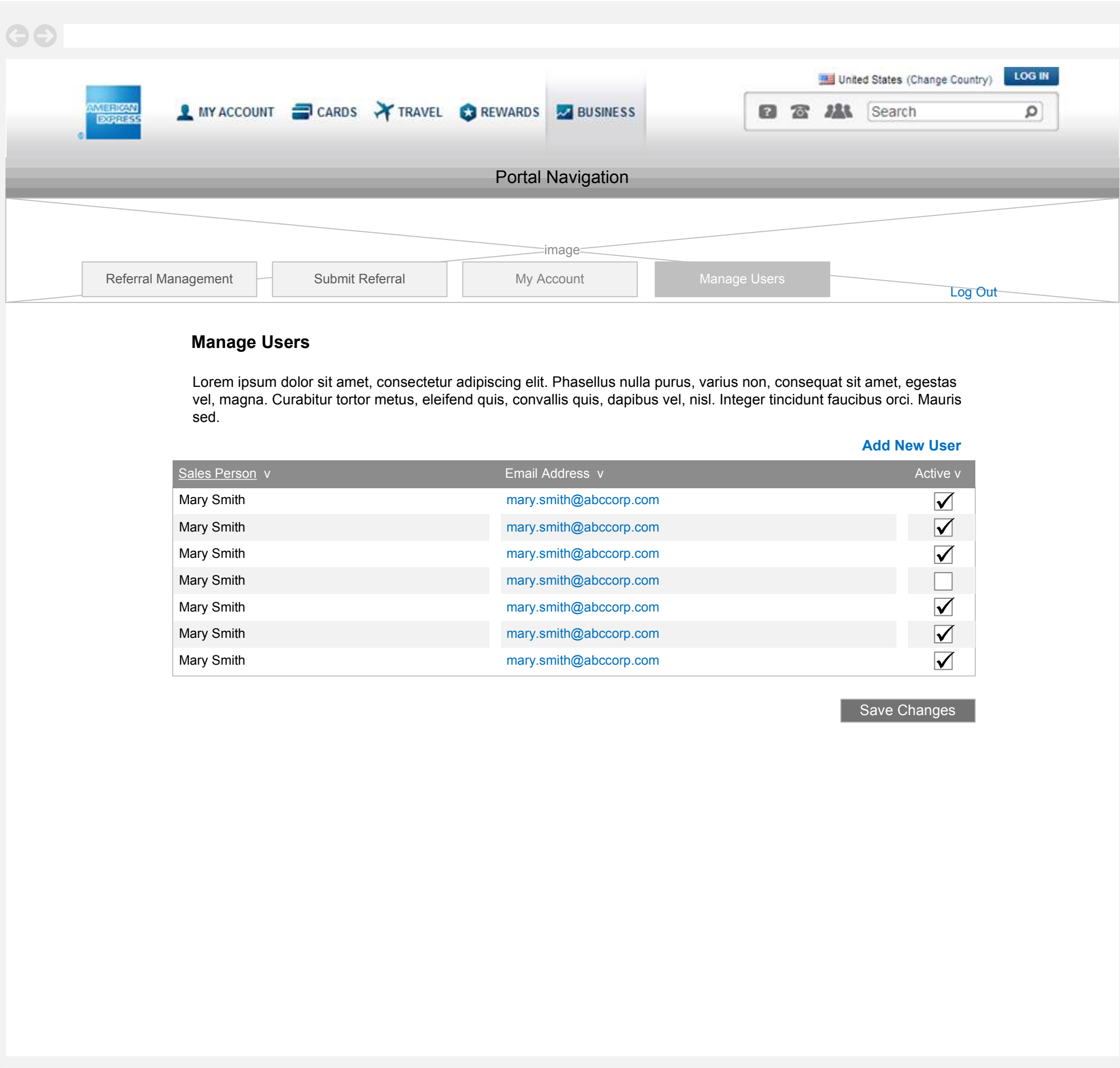
The partner’s specific Terms and Conditions are available for review on the My account page too.



Annotations

Persona: Partner

Site Map Page: 1.3



Annotations

Persona: Partner AO Site Map Page: 3.4

AO Partners have an additional, “Manage Users” page on which they can add new users, as well as activate and deactivate other users in their company..



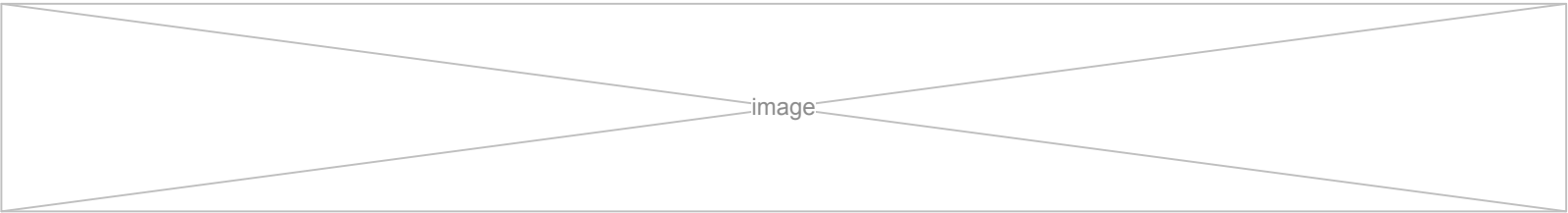
Add New User

Persona: Partner AO
Site Map Page: 3.4.1

Annotations

Persona: Partner

Clicking on either link in the mail will open the Change Password page, where the user can change their password. Having entered this way, once the password is changed, they are directed to the landing page (*or Submit a Referral form?*)



Dear Steve Smith,

A new account has been added for you to access the [American Express Partner Portal](#).

You may log in using this email address and the temporary password: XXXXXXXX.

You will be prompted to change your password to something you can more easily remember. Once you have done so, you can start submitting new Lead Referrals to American Express.

[Log in now.](#)

Thank you,
American Express Partner Portal Team

1. The “Submit Referral” link has been added so Partner Managers have access to the Submit a Referral form in order to submit on a partner’s behalf. (See *Wireframes: Referral Management - Submit Referral for a Partner Page*)

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Search

Referral Management

Partner Management

My Account

Log Out

1

Submit a New Lead Referral

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci.

All fields are required unless otherwise indicated

Referring Partner Company Name

Referring Partner User Name (if known)

Company Name

Company Division (optional)

Company Street Address 1

Company Street Address 2 (if applicable)

Company Street Address 3 (if applicable)

Company City

Company Postal Code

Company Country

Germany

Company Registration Number (if applicable) ?

Contact First Name

Contact Last Name

Contact's Title

Contact's Position ?

Contact's Telephone Number

Contact's Email Address

Annual Company Revenue (optional) ?

Annual Travel Spend (optional) ?

Product of Interest (optional) ?

Exisiting Competitor Products (optional)

Additional information

Submit

Annotations

Persona: Local Partner Manager Site Map Page: 4.1

1. This page is added so Partner Managers can submit new referrals on behalf of a partner. This form is identical to the Partners’ version of the same form, but also has the first two fields, “Referring Partner Company Name”, and “Referring Partner User Name).
2. Both of the new fields are look ups. The contents of the “Referring Partner User Name” lookup are populated based on the selection of the first, “Referring Partner Company Name” field. The list of users in the second field indicates the AO of the selected company by including a “(AO)” next to the name, as illustrated below.

Referring Partner Company Name

Referring Partner User Name (if known)

(AO) Jane Doe
John Doe
Mary Smith
Steve Stevenson

AMERICAN EXPRESS

MY ACCOUNTCARDSTRAVELREWARDSBUSINESS

United States (Change Country)LOG IN

Search

^

Rejected Referrals to Review

9

See Complete Report

Company v	Contact Name v	Submitted Date v	Partner v	Partner Type v
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A

Rejected Aug 06, 2013

Submitted By: Jane Smith, XYZ LLC. July 25, 2013

Referral Reference ID: 12345678

Reason for Rejection: Insufficient annual spend

Company Name

ABC Corp

Company Division

Company Street Address 1

123 Main St.

Company Street Address 2

Company Street Address 3

Company City

Amsterdam

Company Postal Code

123456

Company Country

Netherlands

Company Registration Number

Additional information

Contact First Name

John

Contact Last Name

Dow

Contact's Title

CTO

Contact's Position

CTO

Contact's Telephone Number

123-456-7890

Contact's Email Address

John.doe@abccorp.com

Annual Company Revenue

€2.000.000 - €5.000.000

Annual Travel Spend

€500.000 - €1.000.000

Product of Interest

Corporate Card

Exisiting Competitor Products

Re-Submit

Close

ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A
-----------	----------	--------------	---------	--------

✓

Referrals Under Review

162

See Complete Report

Annotations

Persona: Local Partner Manager Site Map Page: 4.0

On click of the Lead Referral, the table row expands to expose the details of the lead. This is a form which the Local Partner Manager can edit the lead referral information and re-submit if necessary.

The “Close” links close the details.

The Re-Submit button should remain inaccessible until a change has been made to a value in one of the fields. This will reduce the same, identical referral record from being sent to validation.

This is the same set of fields as the Submit New Lead form. Does this view require all of the same fields? Any additional fields?

←

→

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Search

Referrals Under Review

162

Company v	Contact Name v	Submitted Date v	Partner v	Partner Type v
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A

Submitted By: Jane Smith, XYZ LLC. July 25, 2013

Close

Referral Reference ID:
12345678

Company Name

ABC Corp

Contact First Name

John

Contact Last Name

Dow

Company Division

Contact's Title

CTO

Company Street Address 1

123 Main St.

Contact's Position

CTO

Company Street Address 2

Contact's Telephone Number

123-456-7890

Company Street Address 3

Contact's Email Address

John.doe@abccorp.com

Company City

Amsterdam

Annual Company Revenue

\$2,000,000 - \$5,000,000

Company Postal Code

123456

Company Country

Netherlands

Annual Travel Spend

\$100,000 - \$1,000,000

Company Registration Number

Product of Interest

Corporate Card

Additional information

Exisiting Competitor Products

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

Annotations

Persona: Local Partner Manager Site Map Page: 4.0

These leads are currently under review, therefore, they are in a read-only mode.

Values available in the Annual Revenue select list are:
\$2,000,000 - \$5,000,000
\$5,000,000 - 10,000,000
\$10,000,000 - \$100,000,000
\$100,000,000 -\$500,000,000
\$500,000,000+

Values available in the Annual Travel Spend select list are:
Below \$100,000
\$100,000 - \$1,000,000
\$1,000,000 - \$5,000,000
\$5,000,000 - \$25,000,000
\$25,000,000+

←

→

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

☎

👤

Search

2

Partner Requests

5

See All Partners

Company v	AO Name v	Submitted Date v	Partner Type v
ABC Corp.	John Doe	Jul 15, 2013	Type A
ABC Corp.	John Doe	Jul 15, 2013	Type A

Close

Authorizing Officer Email Address

jane.smith@xyzllc.com

Authorizing Officer First Name

Jane

Authorizing Officer Last Name

Smith

Authorizing Officer Phone Number

1234-456-7890

Notes

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Company Name

XYZ LLC.

Type of Partnership

Travel

Street 1

123 Main St

Suite 100

City

Amsterdam

Postal Code

123456

Country

Netherlands

Source

Sub-Source

Inter Amex Identifier?

☐ Yes

☐ No

Partnership Type

Partnership Manager

Program Description

Approve

Deny

ABC Corp.	John Doe	Jul 15, 2013	Type A
ABC Corp.	John Doe	Jul 15, 2013	Type A
ABC Corp.	John Doe	Jul 15, 2013	Type A

3

All Partners

123

Rejected Partner Requests

4

Annotations

Persona: Local Partner Manager Site Map Page: 4.1

Partner Managers can view all of the current Partner Requests, and the details of those requests can be opened inline in the table where the Partner Manager can upload the contract or approve or deny the request.

1. The Status column had been added so the Pending and Rejected requests can both remain in the same table, but now that the “Rejected” table has been added, there is no need to have the column here.
2. The Table is renamed “Partner Requests” in order to accommodate requests that are not just pending.
3. These 5 input fields have been added so the Partner Manager can define the additional information before clicking “Approve”. The default representative is defined by the Partner Type of the partner being approved.

Questions:

- Are there any business reasons to keep Approved requests in this table? The approved partners appear in the second table, but if the PM wants to refer to the application, this table would be the only place to do that.
- We may need a way to purge older records. I don’t see this being a significant issue in the near term, but it may become a issue over time.
- Does this new Representative field solve the intention of the PP18 Story?
- Should the wireframes include the contents of these new dropdown menus?
- What is the dominant use case for the Partner Manager and why do they need all these options: Save/Submit/Approve/Deny?

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

Search

Partner Requests

5

All Partners

123

1 Rejected Partner Requests

4

See All Partners

Company v

AO Name v

Submitted Date v

Partner Type v

ABC Corp.

John Doe

Jul 15, 2013

Type A

ABC Corp.

John Doe

Jul 15, 2013

Type A

2 Rejected August 15, 2013 by David Smith

Close

Authorizing Officer Email Address

jane.smith@xyzllc.com

Authorizing Officer First Name

Jane

Authorizing Officer Last Name

Smith

Authorizing Officer Phone Number

1234-456-7890

Notes

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna.

Company Name

XYZ LLC.

Type of Partnership

Travel

Street 1

123 Main St

Suite 100

City

Amsterdam

Postal Code

123456

Country

Netherlands

Partnership Type

Partnership Manager

Program Description

Source

Sub-Source

Inter Amex Identifier?

Yes

No

Approve

ABC Corp.

John Doe

Jul 15, 2013

Type A

ABC Corp.

John Doe

Jul 15, 2013

Type A

Annotations

Persona: Local Partner Manager Site Map Page: 4.1

Partner Managers can view all of the current Partner Requests, and the details of those requests can be opened inline in the table where the Partner Manager can upload the contract or approve or deny the request.

1. This new “Rejected Partner Requests” table lets Partner Managers access requests that have previously been rejected.
2. Details of each request are presented just like a new request, but with the addition of the “Rejected [Date] by [name]” message at the top, and with only the “Approve” button at the bottom.

AMERICAN EXPRESS

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

United States (Change Country) LOG IN

Search

Portal Navigation

Referral Management Partner Management My Account

Log Out

Add a New Partner

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna.

All fields are required unless otherwise indicated

Authorizing Officer Email Address

A temporary password will be automatically generated and emailed to the Authorizing Officer

First Name

Last Name

Phone Number

Add New Partner

Company Name _____

Type of Partnership 

Street Address 1

Street Address 2

Street Address 3

City

Postal Code

Country ▼

Annotations

Persona: Local Partner Manager

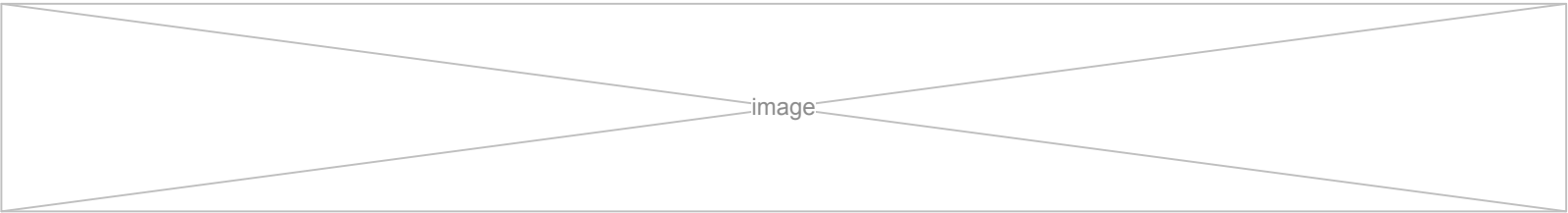
Site Map Page: 4.1.1

The Local Partner Manager as the ability to create new Partner companies and define the Authorizing Officer.

Annotations

Persona: Partner

Clicking on either link in the mail will open the Change Password page, where the user can change their password. Having entered this way, once the password is changed, they are directed to the landing page *(or Submit a Referral form?)*



Dear Steve Smith,

Welcome to the American Express Partner Portal.

A new account has been created for you to access the [American Express Partner Portal](#), on behalf of your company.

You may log in using this email address and the temporary password: XXXXXXXX.

You will be prompted to change your password to something you can more easily remember. Once you have done so, you can start submitting new Lead Referrals to American Express and begin adding additional individuals from your company.

[Log in now.](#)

Thank you,
American Express Partner Portal Team

←

→

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

United States (Change Country)

LOG IN

?

Search

Referral Management

Partner Management

My Account

Log Out

Partner Management

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Add New Partner

Partner Requests

5

All Partners

123

Company v	Partner Type v	Contact Name v	Contact Email v	Contact Phone v
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890
ABC Corp.	Type A	John Doe	john.doe@xyzllc.com	123-456-7890

Rejected Partner Requests

4

Annotations

Persona: Local Partner Manager Site Map Page: 4.0

Partner Managers can view all of the current Partner Requests, and the details of those requests can be opened inline in the table where the Partner Manager can upload the contract or approve or deny the request.

The screenshot shows the top navigation bar of the American Express website. It includes the American Express logo, links for MY ACCOUNT, CARDS, TRAVEL, REWARDS, and BUSINESS. The 'BUSINESS' link is highlighted with a blue box. To the right, there is a language selector set to 'United States', a 'LOG IN' button, and a search bar. Below the screenshot, a diagram illustrates the navigation structure. It shows a horizontal bar labeled 'Portal Navigation' with four segments: 'Referral Management', 'Partner Management', 'My Account', and 'Log Out'. The 'My Account' segment is highlighted in grey, and a line connects it to the 'BUSINESS' link in the screenshot above.

My Account

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas

^

Account Information

Email Address (login username)

John.doe@abccorp.com

First Name

John

Last Name

Doe

Phone Number

123-456-7890

Street Address 1

123 Main St.

Street Address 2 (if applicable)

Street Address 3 (if applicable)

City

Amsterdam

Postal Code

123456

Country

Netherlands

▼

Save

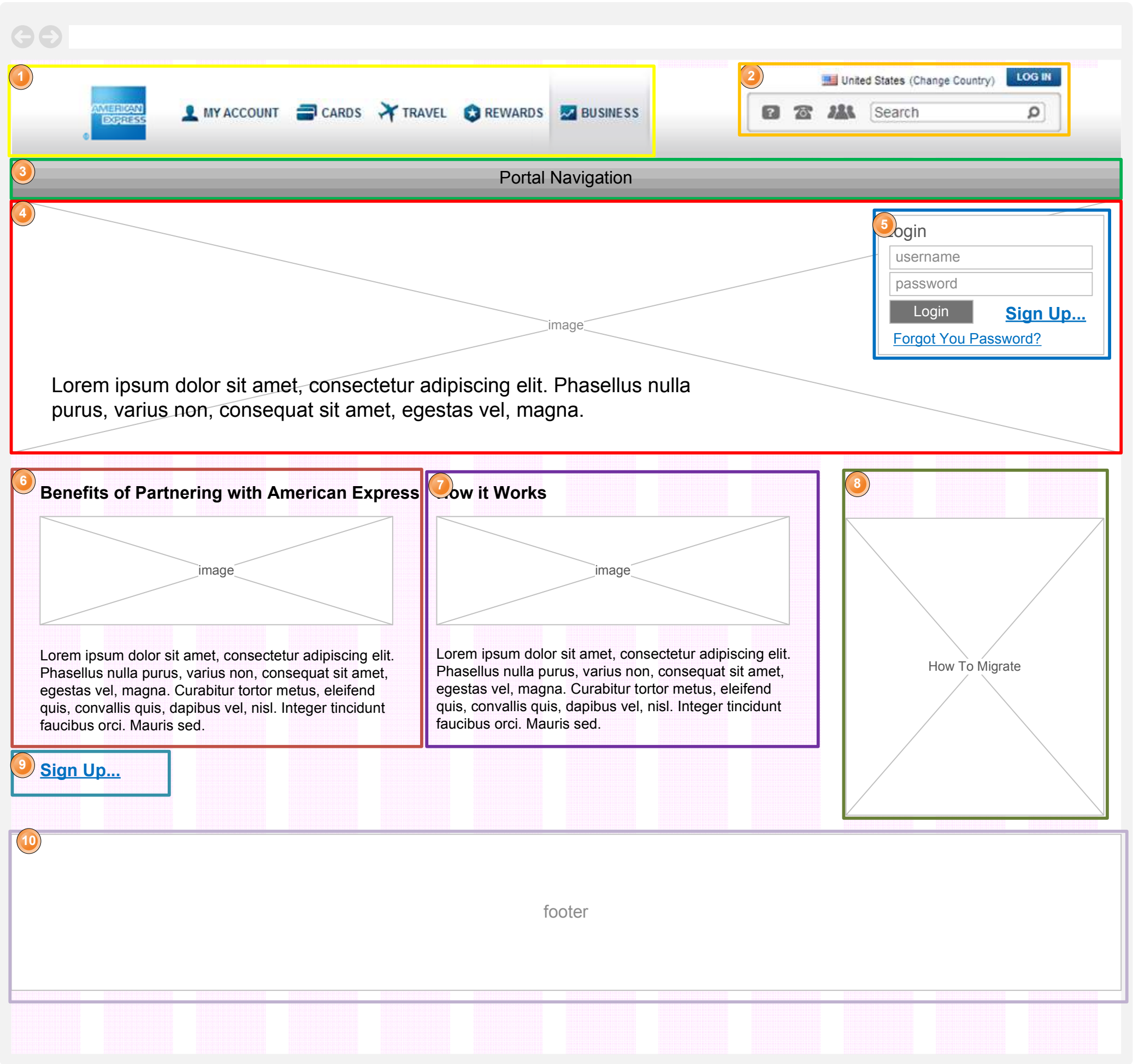
Annotations

Persona: Local Partner Manager
Site Map Page: 1.3

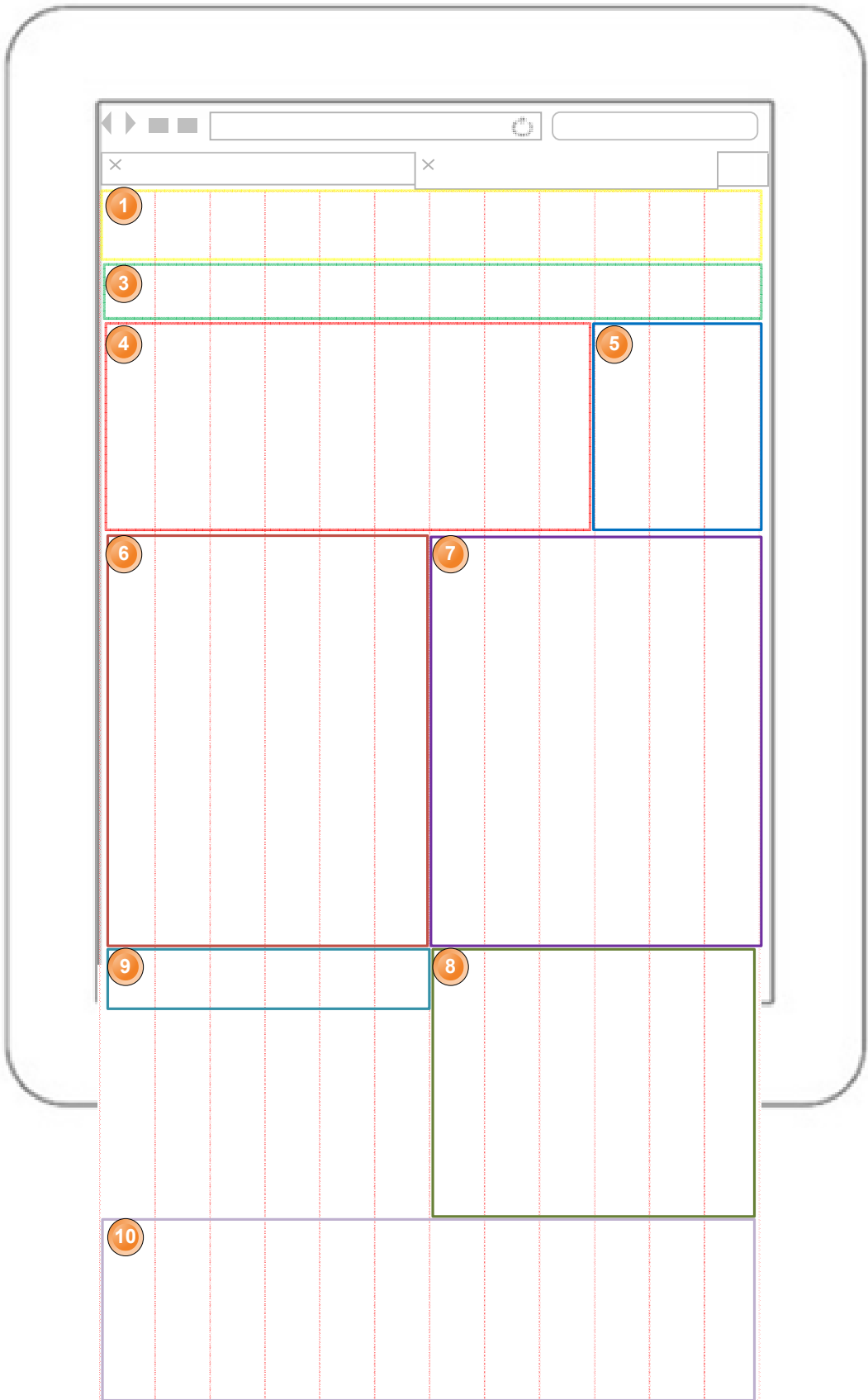
This is the My Account page for the Partner Manager. This page allows the PM to make changes to their contact information.

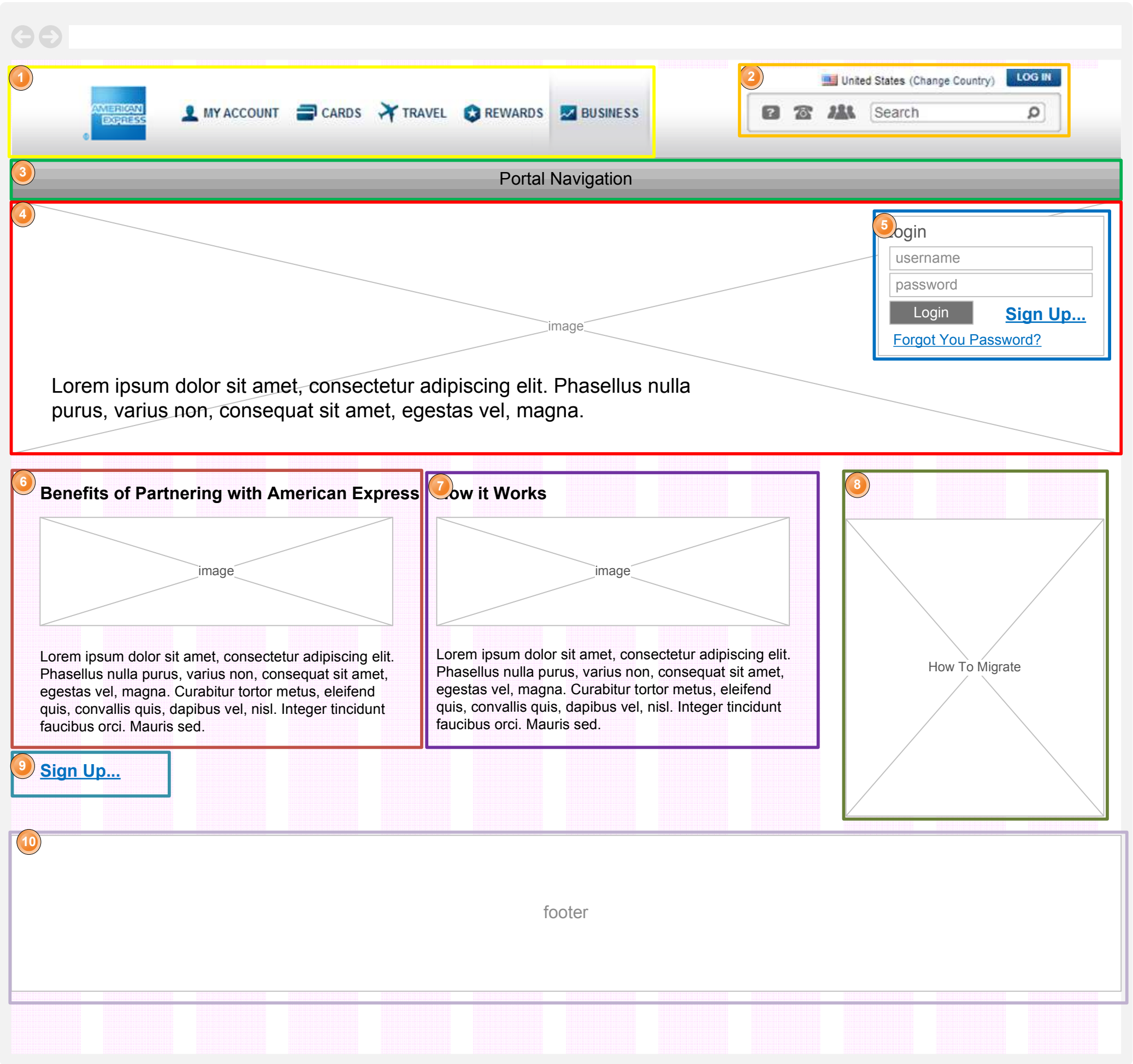
Section 6:

Wireframes – Responsive Layout

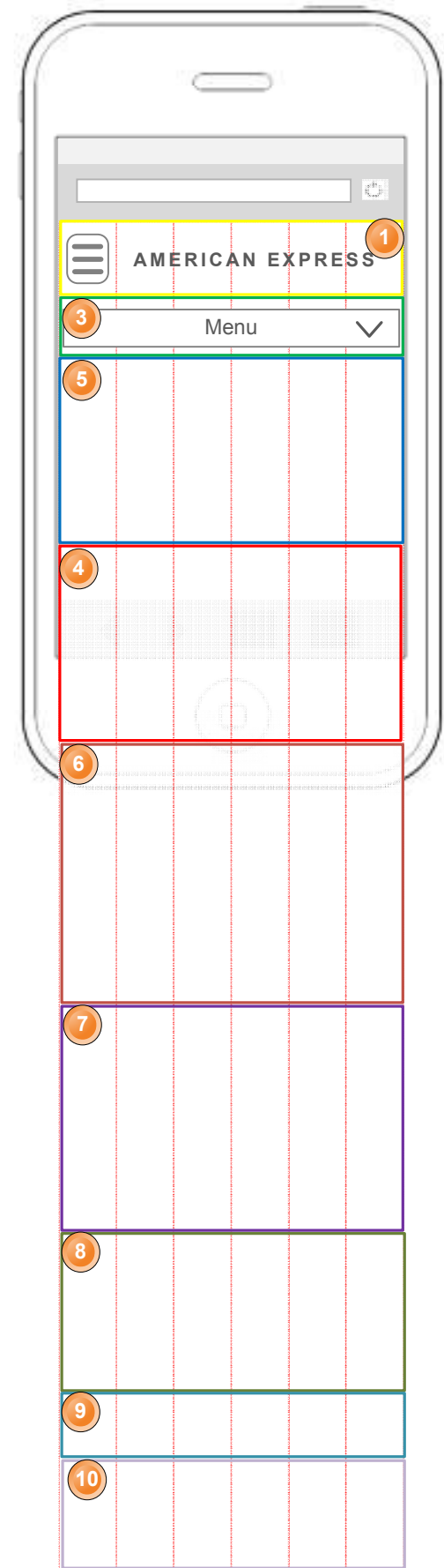


Annotations

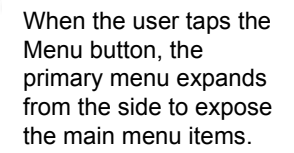




Annotations



1. The general site navigation at the top of the page collapses into a familiar menu button, and the logo is replaced with "American Express".
3. The Portal marketing navigation is collapsed into a select list.



1

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

2

United States (Change Country)

LOG IN

Search

3

Portal Navigation

4

image

5

Sign Up

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

All fields are required unless otherwise indicated

6

Email Address (this will be your login)

Password

Confirm Password

First Name

Last Name

Phone Number

7

Company Name

Type of Partnership

Street

City

Postal Code

Province (if applicable)

Country

8

Comments

9

☐

I agree to the [Terms & Conditions](#) of this website

☐

I would like to receive emails from American Express regarding promotions and programs.

Submit

Annotations

1

3

4

5

6

7

8

9

1

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

2

United States (Change Country)

LOG IN

?

Search

3

Portal Navigation

4

image

5

Sign Up

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

All fields are required unless otherwise indicated

6

Email Address (this will be your login)

Password

Confirm Password

First Name

Last Name

Phone Number

7

Company Name

Type of Partnership

Street

City

Postal Code

Province (if applicable)

Country

8

Comments

9

☐ I agree to the [Terms & Conditions](#) of this website

☐ I would like to receive emails from American Express regarding promotions and programs.

Submit

Annotations

1

AMERICAN EXPRESS

3

Menu

4

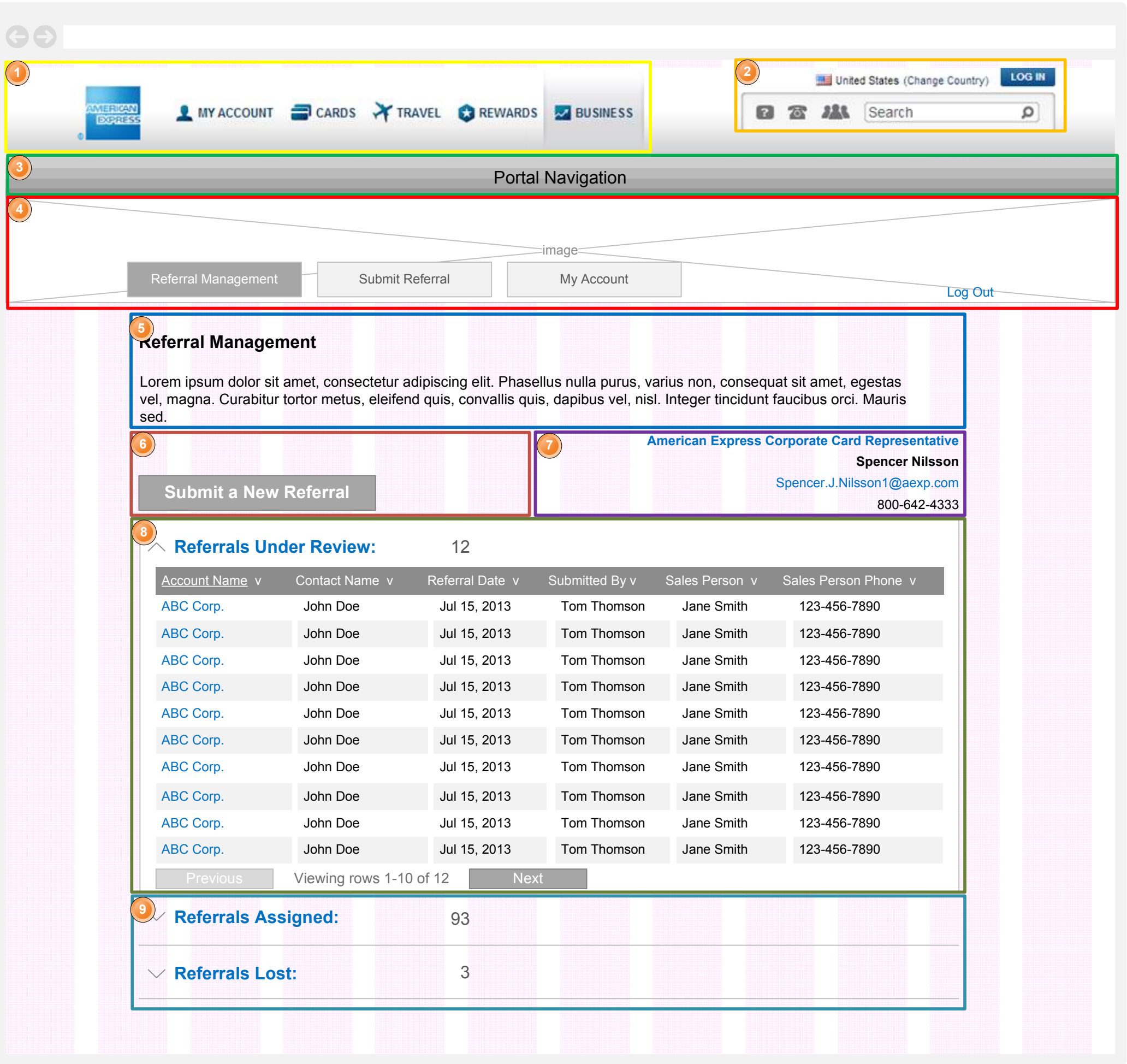
5

6

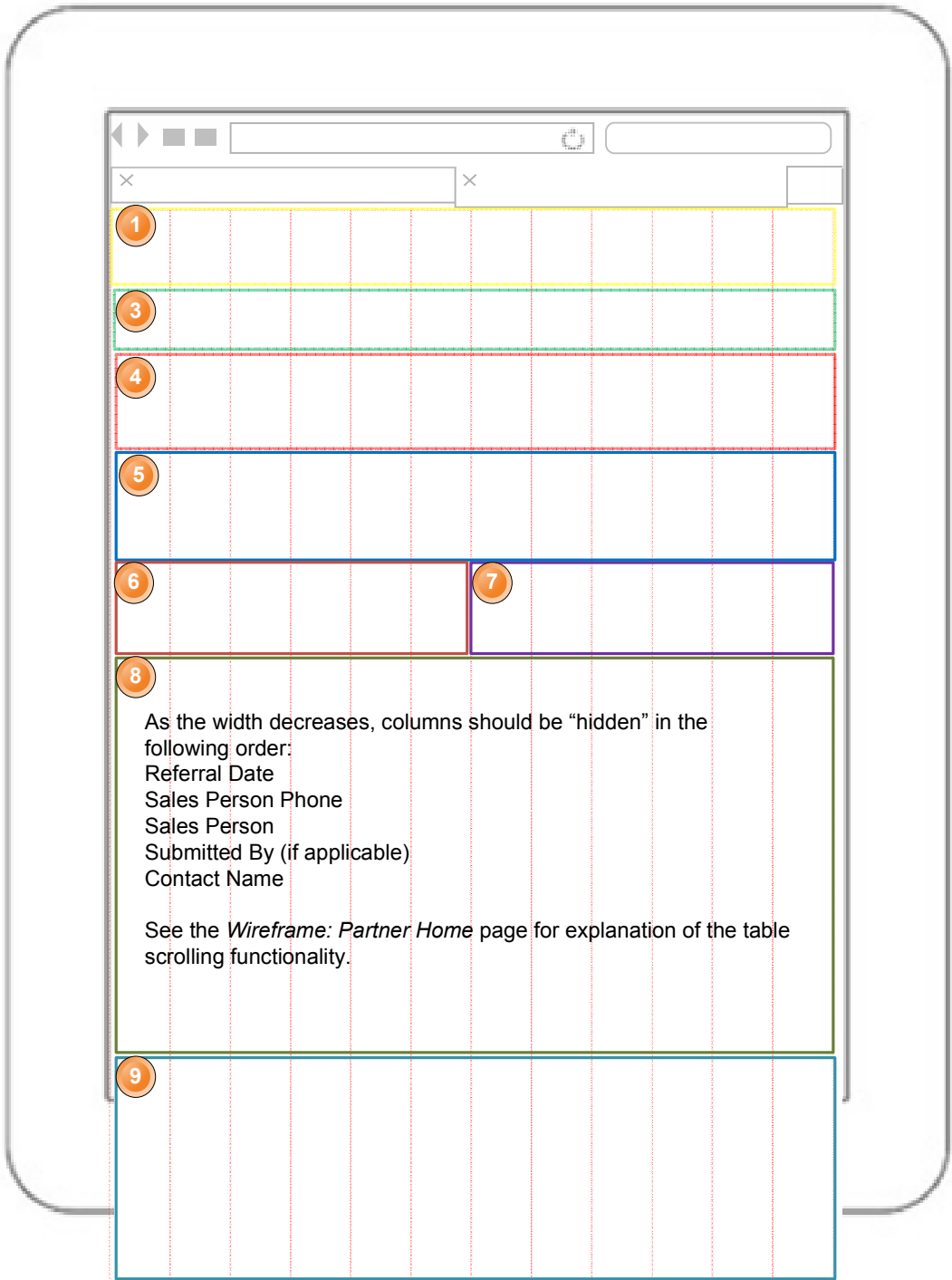
7

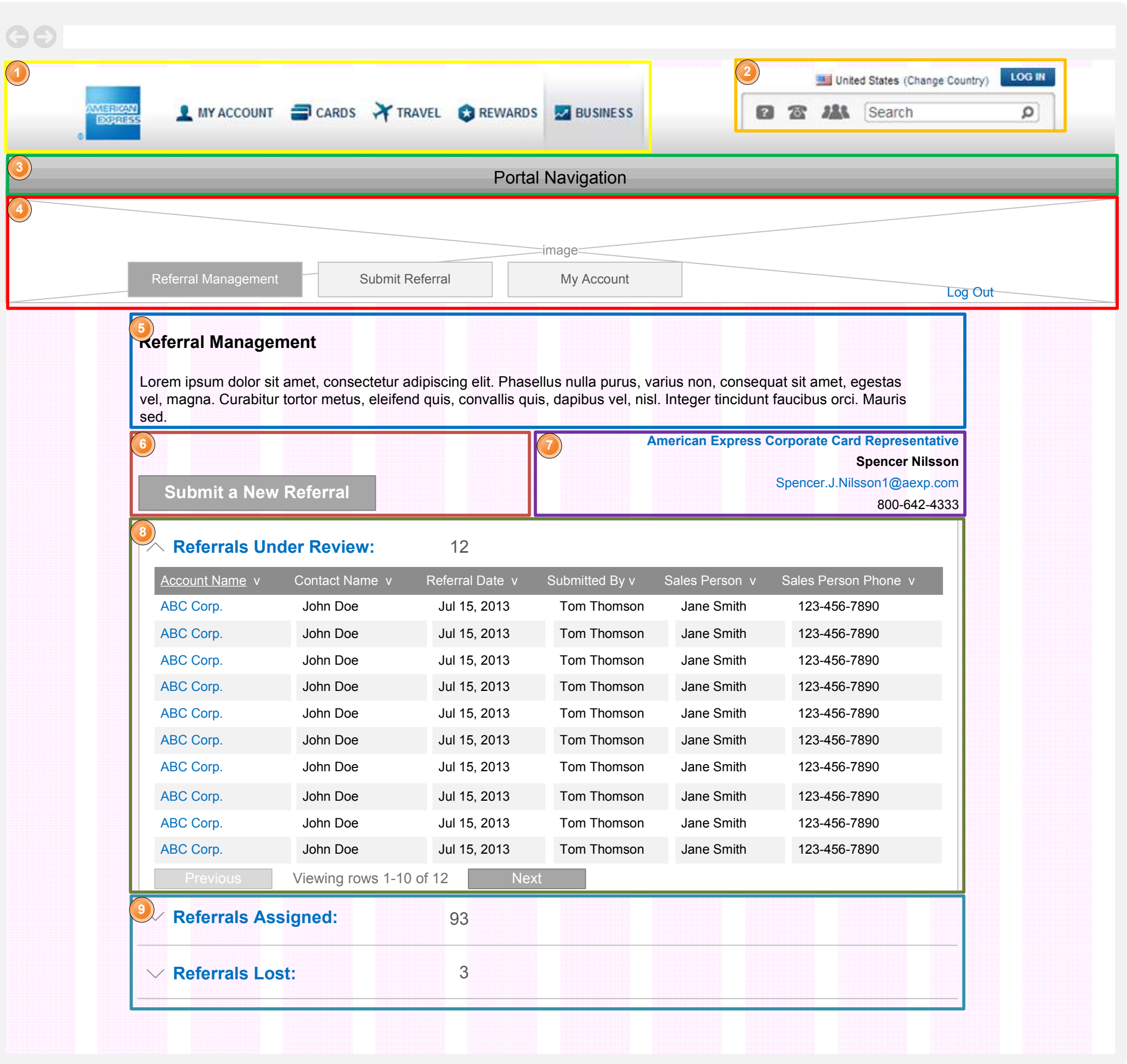
8

9

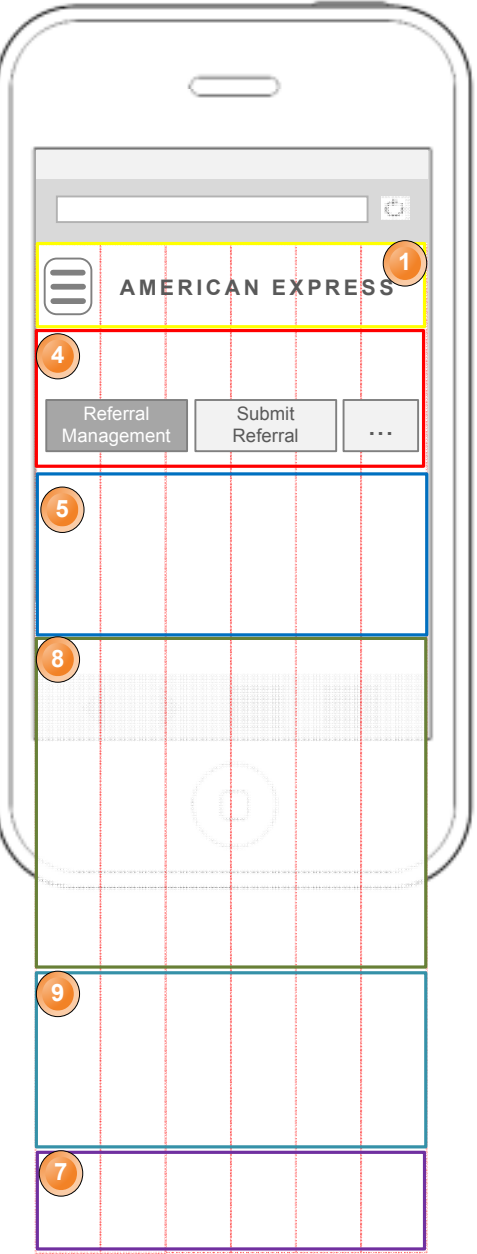


Annotations





Annotations



3/4. The Portal marketing navigation is removed at this width, but the Referral Management, Submit Referral, and My Account buttons and “Log Out” link are displayed. If there is only room for 2, or if the user needs the “Manage Users” button, add the “More” (...) button to provide access to the remaining links

6. Because the “Submit Referral” is also a nav button immediately above, this button is hidden at this screen width.

8. As the width gets narrower, columns should be “removed” in the following order:
Referral Date
Sales Person Phone
Sales Person
Submitted By (if applicable)
Contact Name.

At the 300px width (phone), the only visible column is “Account Name”.

9. Accordions continue to function the same way as on wider views.

7. The AMEX Card Representative information is moved to the bottom of the content so the primary content is available first.

1

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

2

United States (Change Country)

LOG IN

?

Search

3

Portal Navigation

4

Referral Management

Submit Referral

My Account

Log Out

5

Submit a New Lead Referral

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

6

All fields are required unless otherwise indicated

Company Name

Company Street Address

Company City

Company Province (If applicable)

Company Postal Code

Company Registration Number

Product of Interest (optional)

7

First Name of Main Contact

Last Name of Main Contact

Contact's Position

Contact's Telephone Number

Contact's Email Address

8

Annual Travel Spend

Annual Company Revenue

BTA and/or Card opportunity

Travel Management Company Actions To Date

9

Additional information

10

Submit

Annotations

1

3

4

5

6

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8

9

10

1

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

2

United States (Change Country)

LOG IN

?

Search

3

Portal Navigation

4

Referral Management

Submit Referral

My Account

Log Out

5

Submit a New Lead Referral

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna. Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl. Integer tincidunt faucibus orci. Mauris sed.

6

All fields are required unless otherwise indicated

Company Name

Company Street Address

Company City

Company Province (If applicable)

Company Postal Code

Company Registration Number

Product of Interest (optional)

7

First Name of Main Contact

Last Name of Main Contact

Contact's Position

Contact's Telephone Number

Contact's Email Address

8

Annual Travel Spend

Annual Company Revenue

BTA and/or Card Opportunity

Travel Management Company Actions To Date

9

Additional information

10

Submit

Annotations

1

AMERICAN EXPRESS

4

Referral Management

Submit Referral

...

5

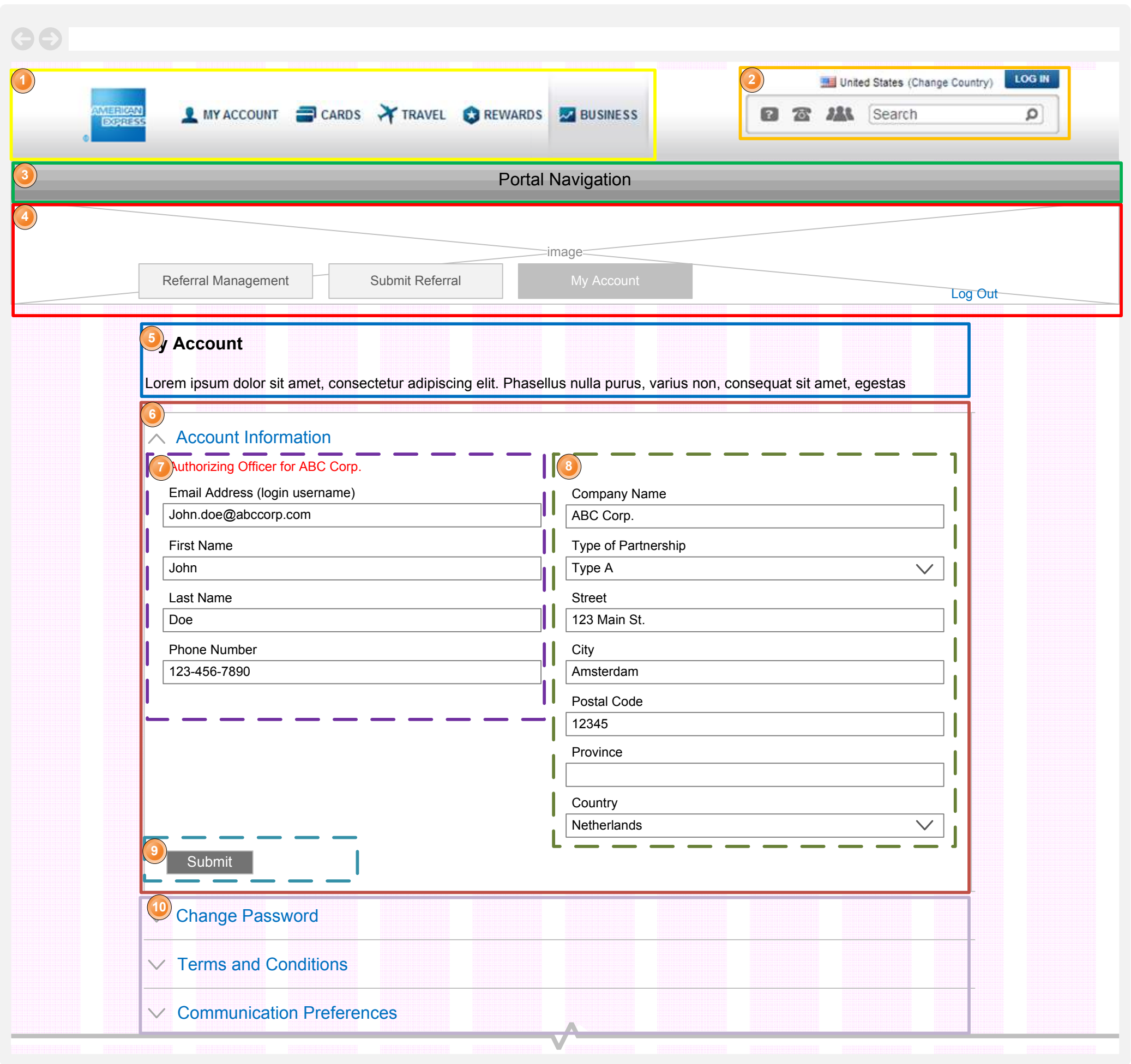
6

7

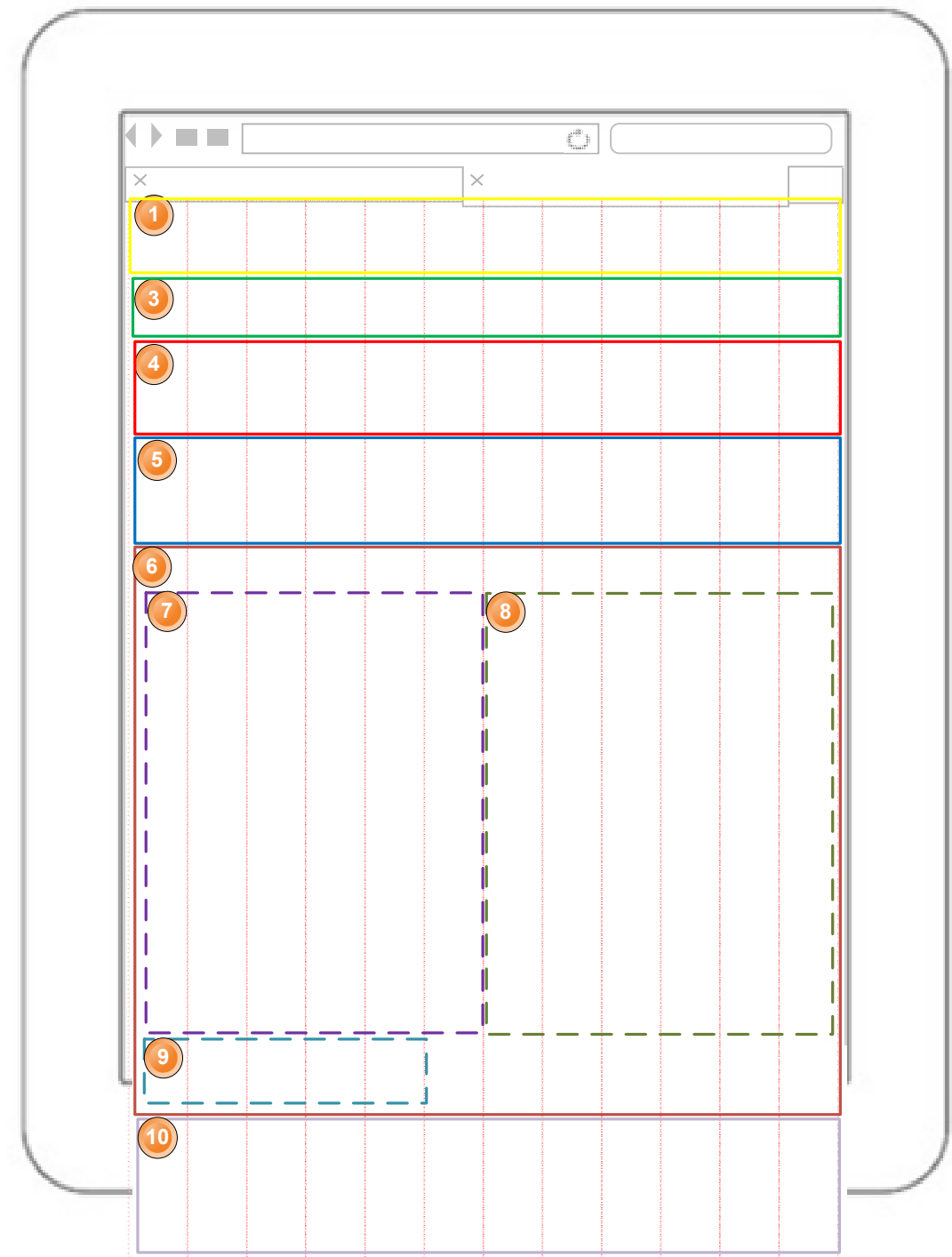
8

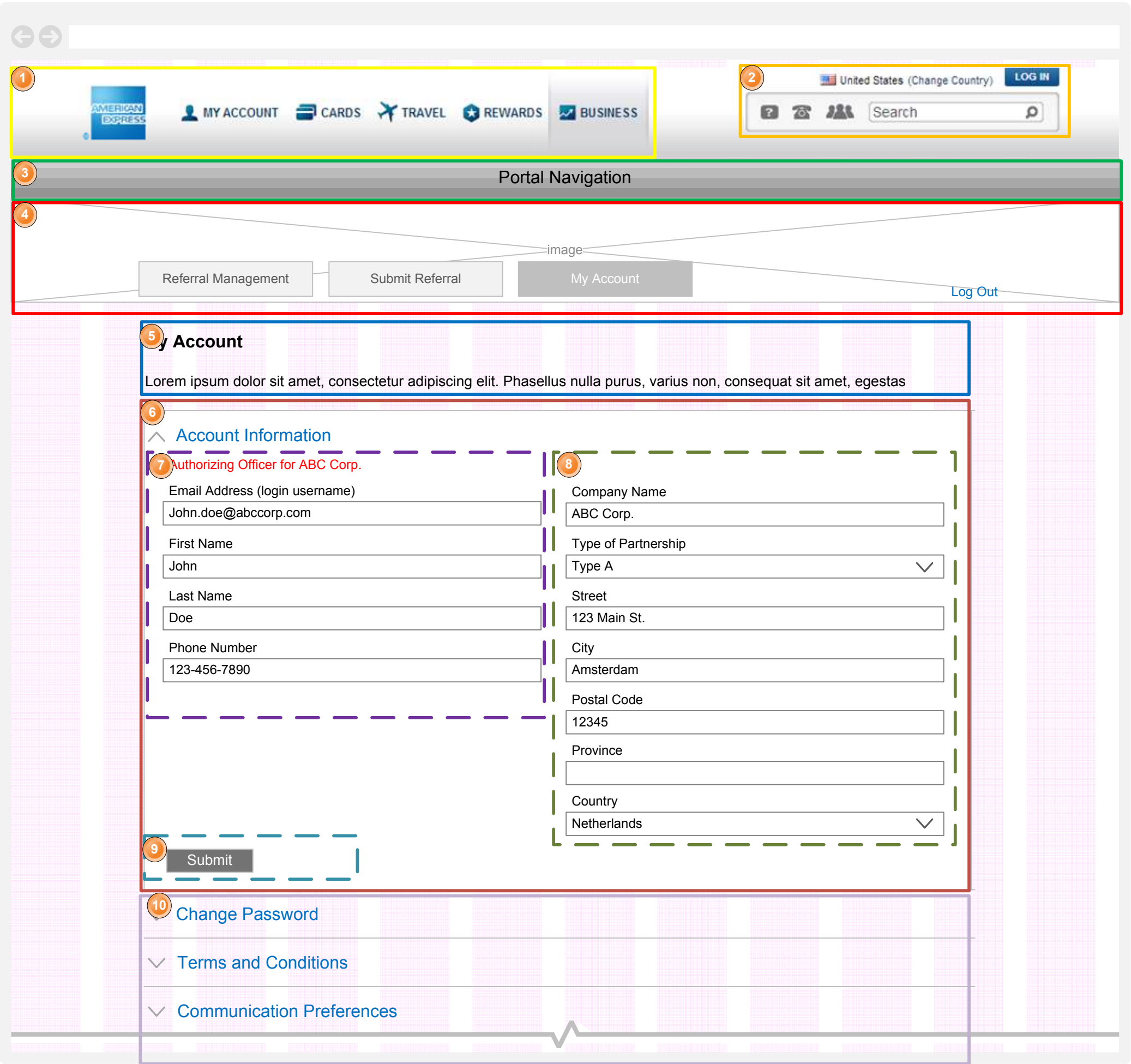
9

10

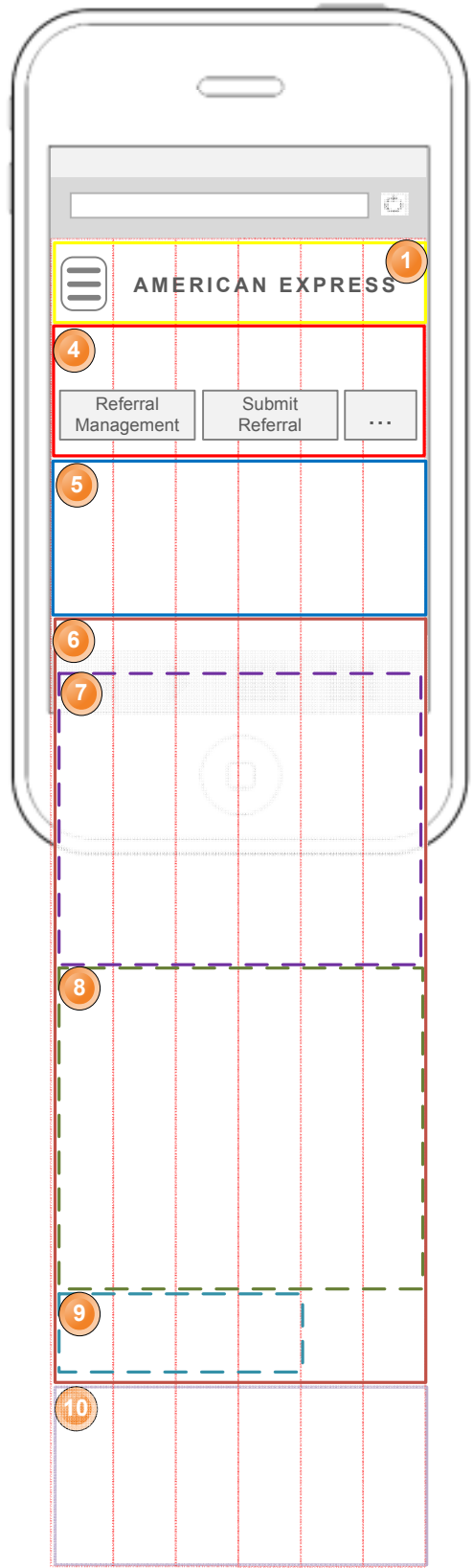


Annotations

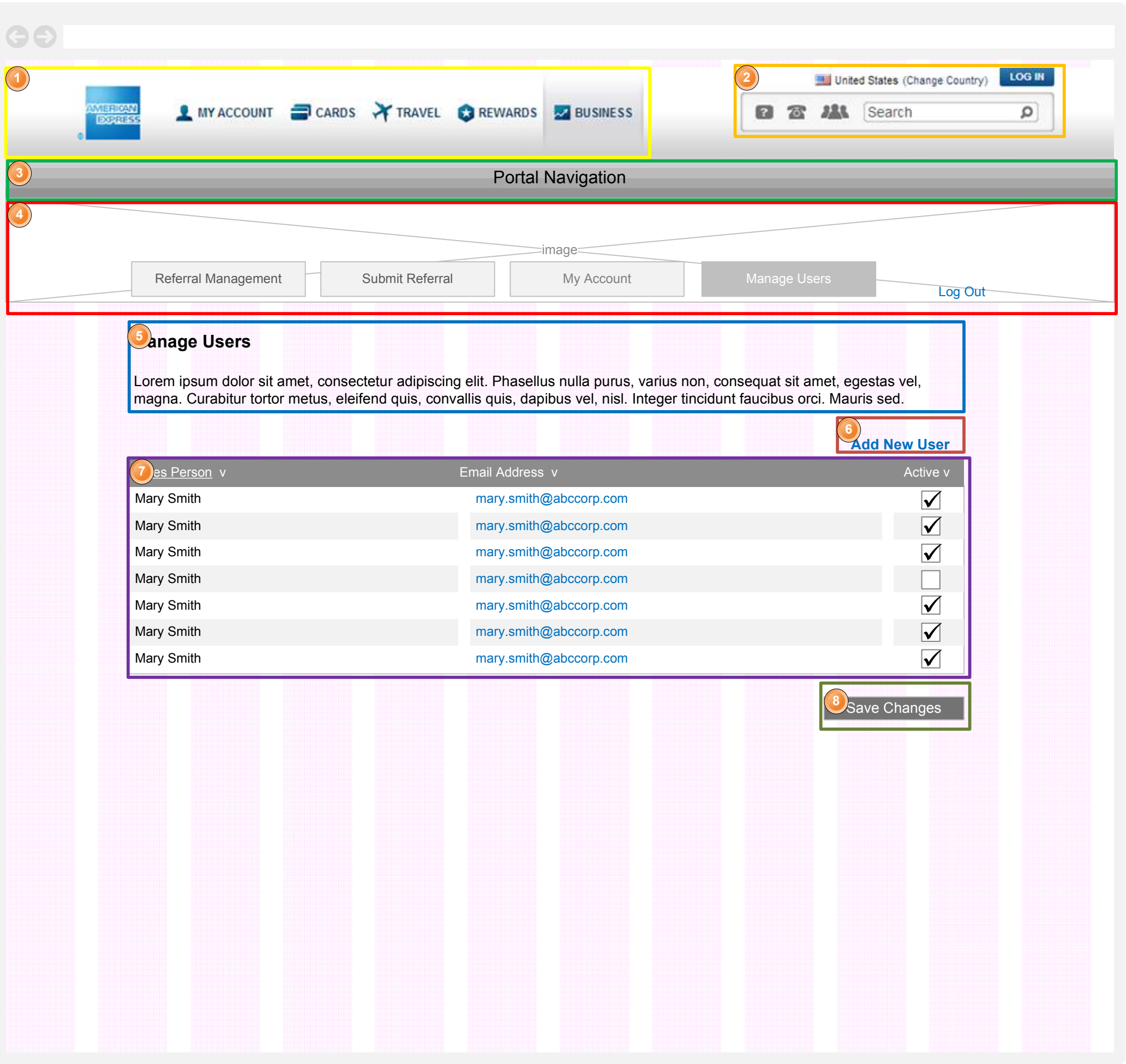




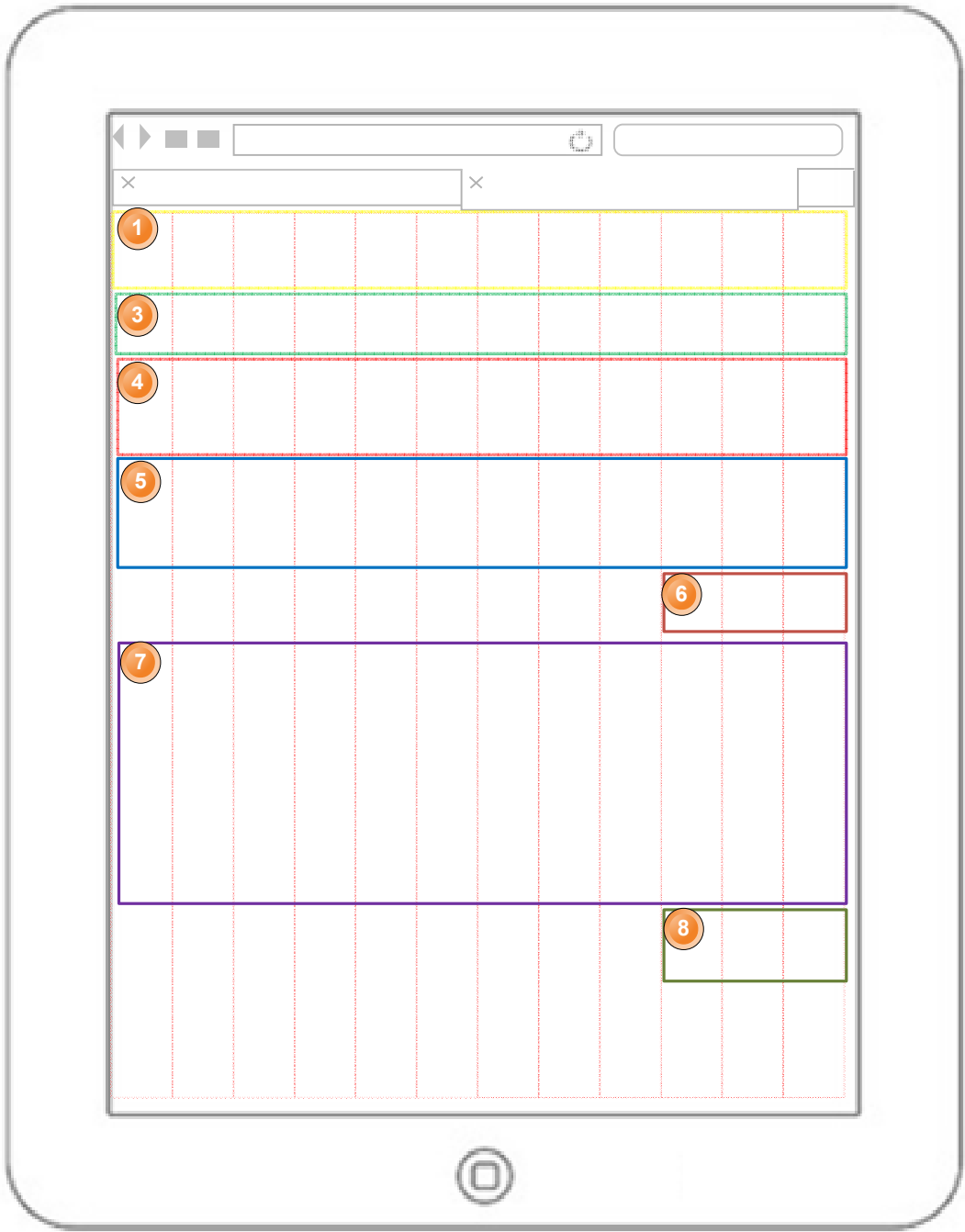
Annotations

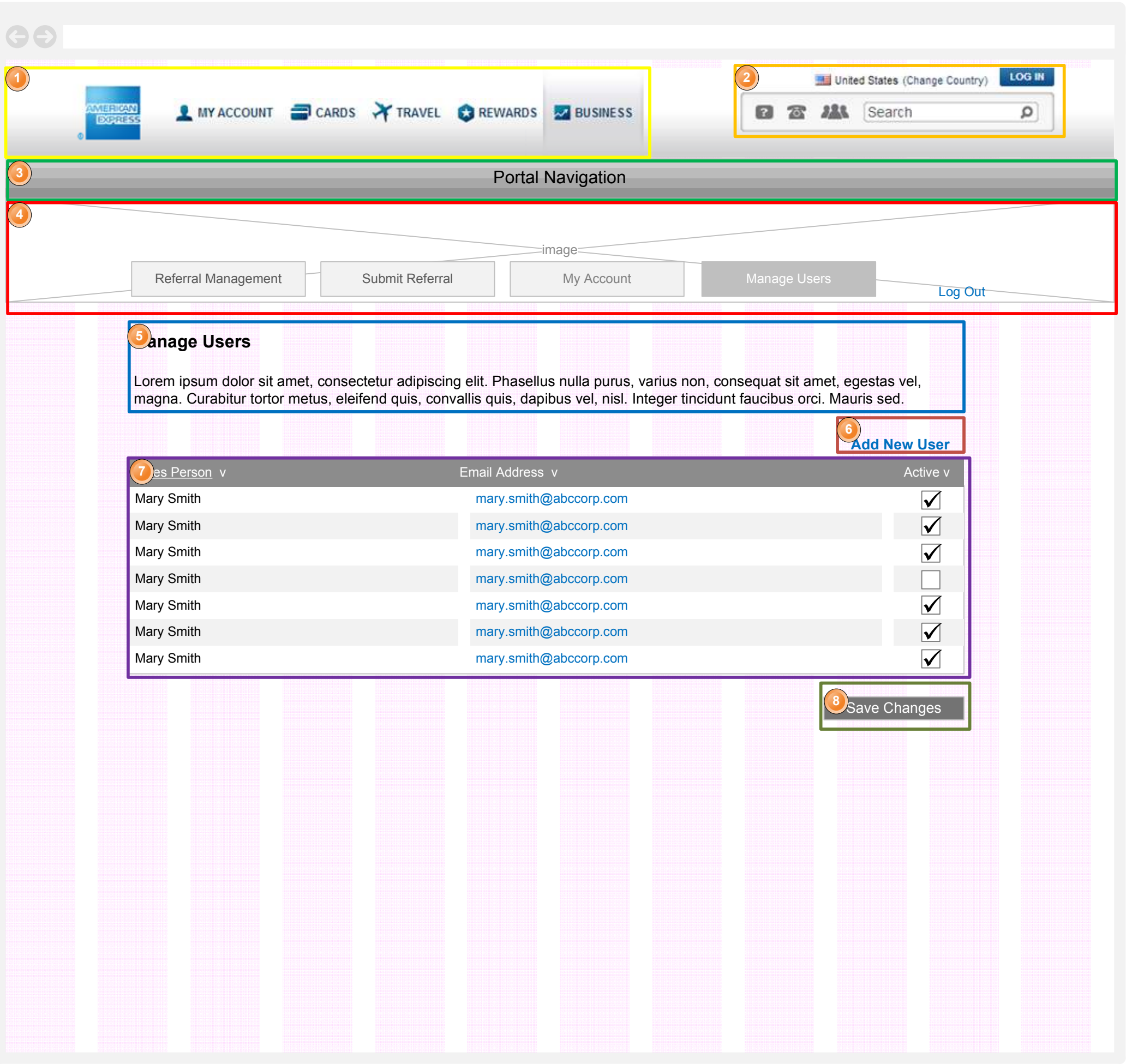


10. Accordions will continue to function the same way as on a wider screen – Only one will be “open” at a time, and the others will be displayed in a “closed” state above and/or below as appropriate.

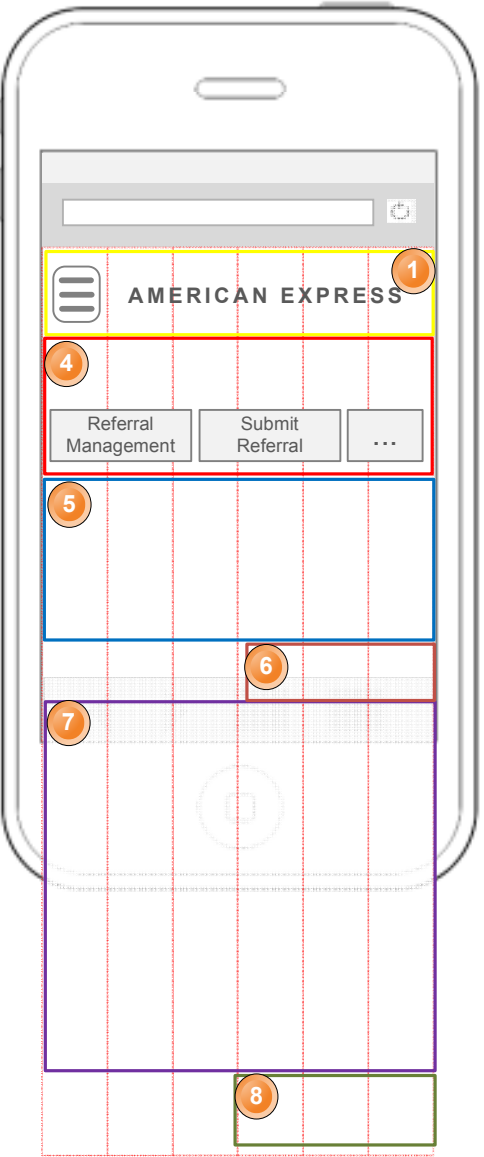


Annotations

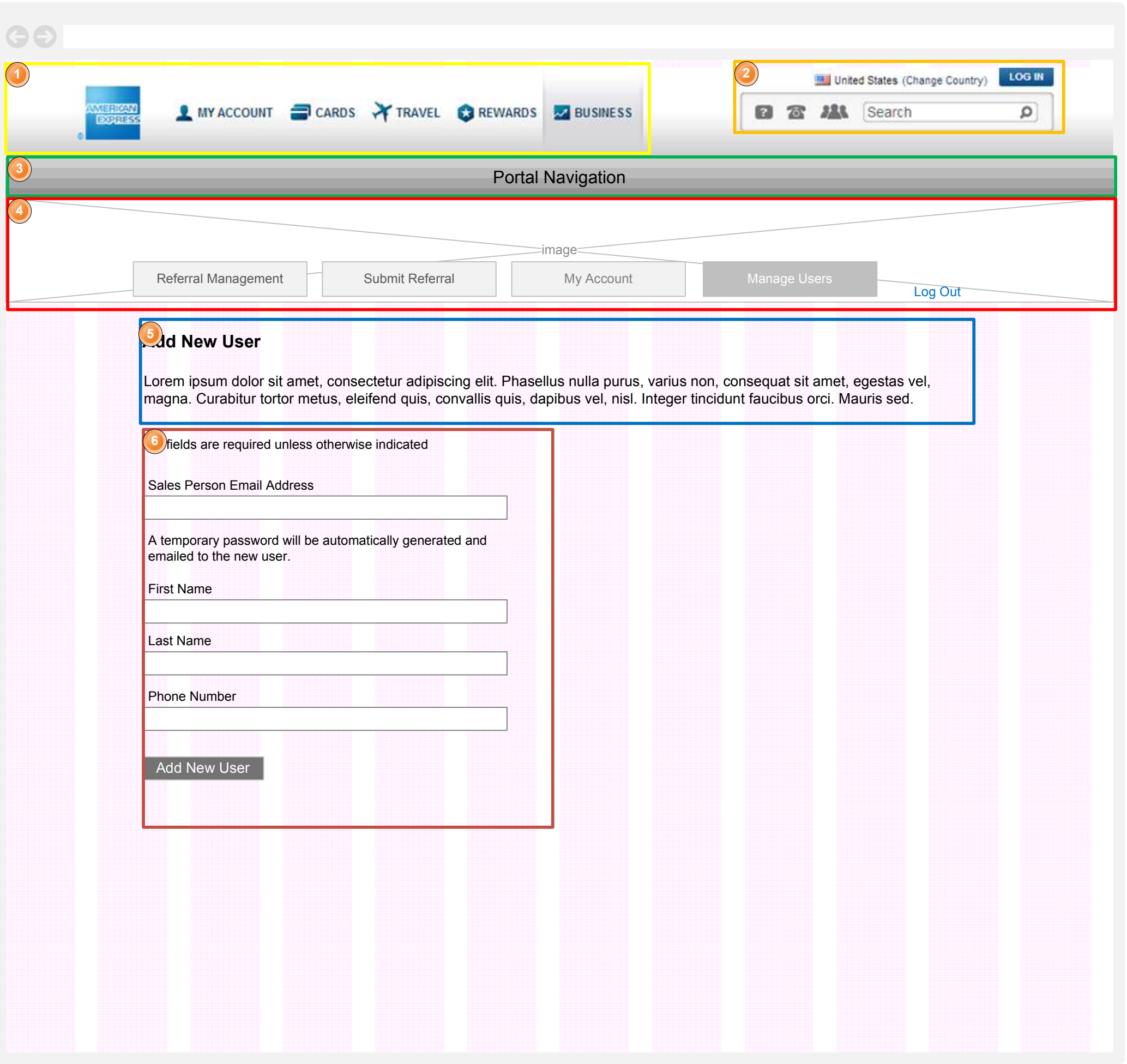




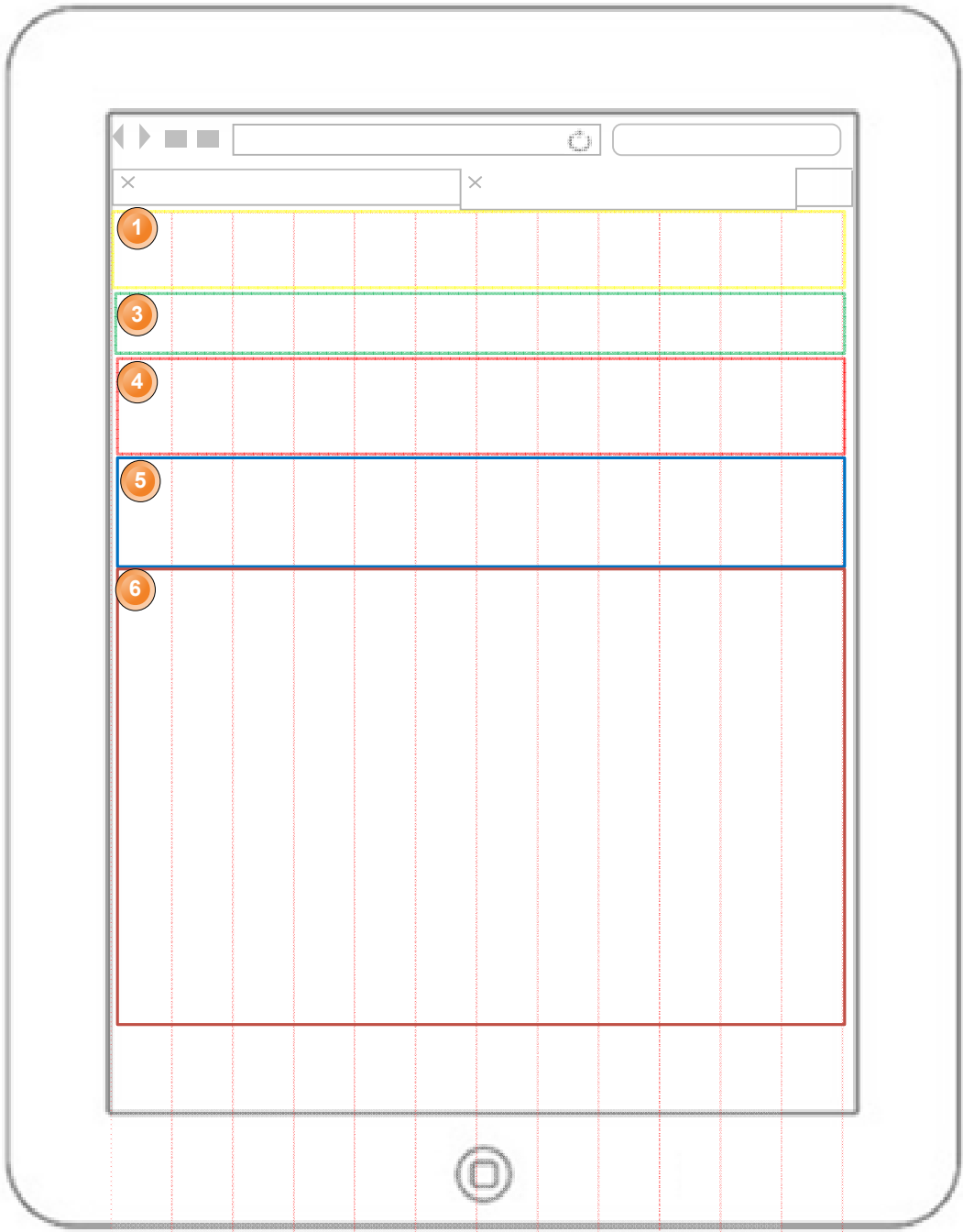
Annotations

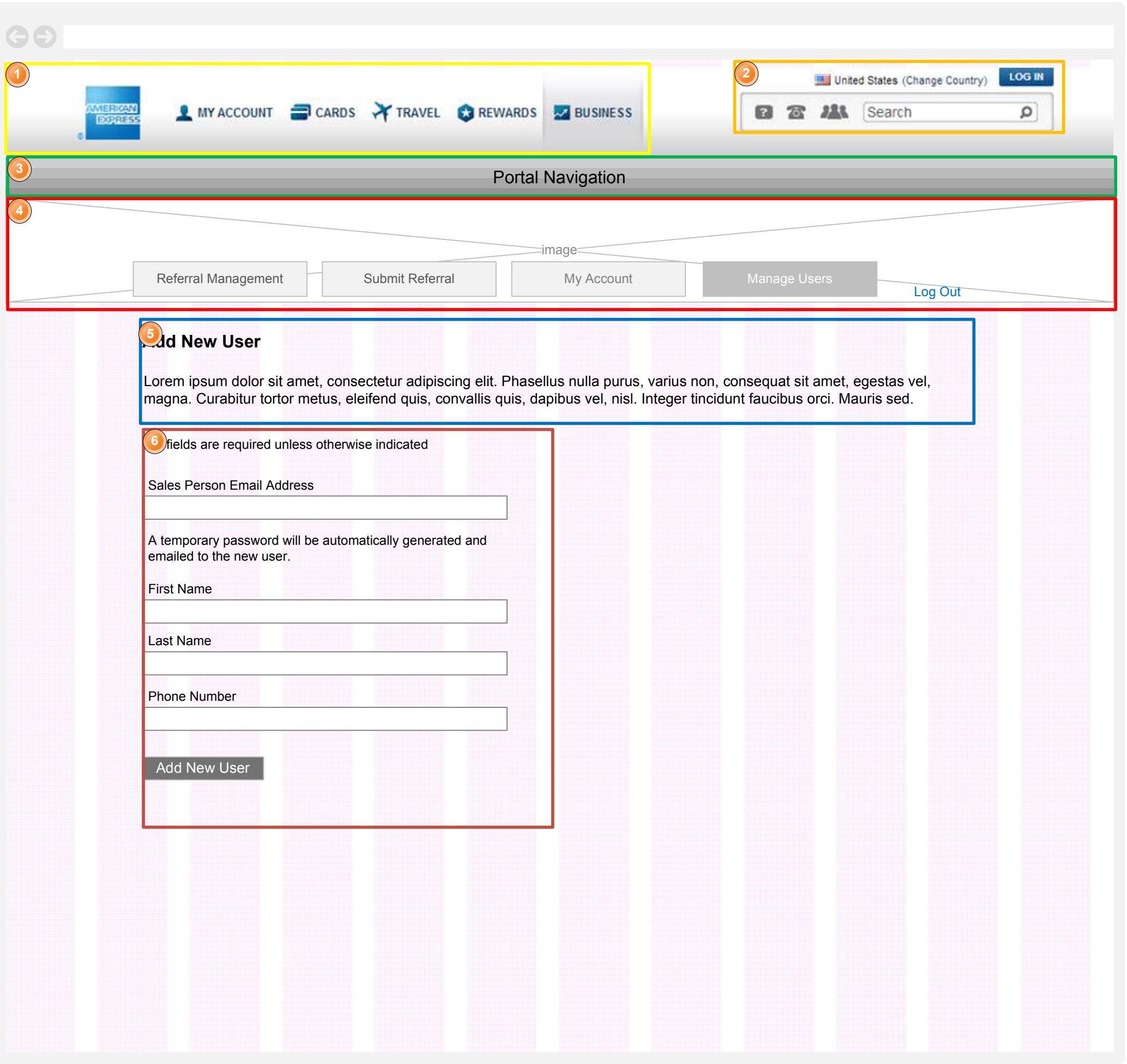


7. At this width, the table displays only the “Sales Person” and “Active” columns. However, the “Active” **header** should be replaced by an icon or should be hidden so the header row doesn’t get too cramped. The column of check boxes remains either way.

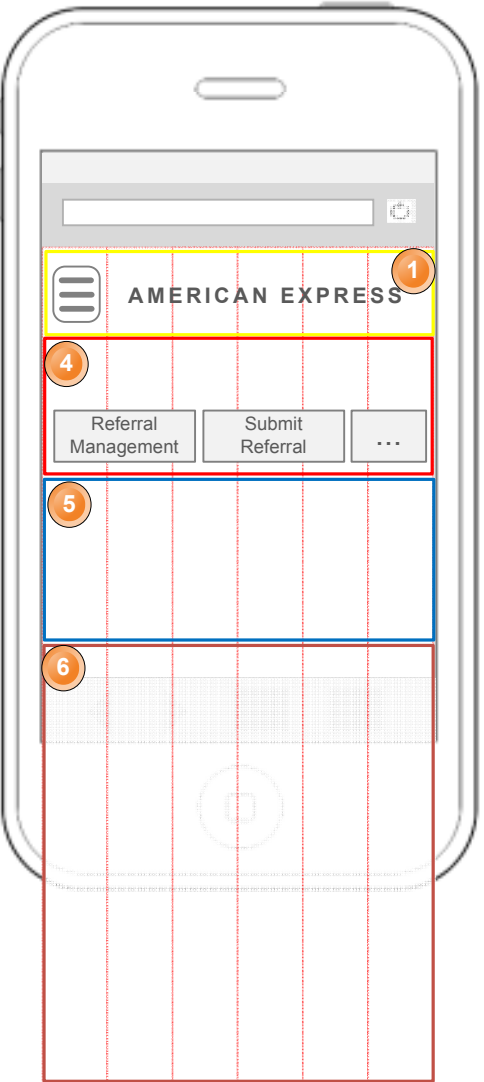


Annotations





Annotations



1

AMERICAN EXPRESS

MY ACCOUNTCARDSTRAVELREWARDSBUSINESS

2

United States (Change Country)LOG IN

?

📞

👤

Search

🔍

5

Rejected Referrals to Review9

See Complete Report

6

Company v	Contact Name v	Submitted Date v	Partner v	Partner Type v
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A
ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A

7

Close

Rejected Aug 06, 2013Submitted By: Jane Smith, XYZ LLC. July 25, 2013Referral Reference ID: 12345678

Reason for Rejection: Insufficient annual spend

8

Company Name

ABC Corp

9

Main Contact First Name

John

* Main Contact Last Name

Doe

* Company Street Address

123 Main St

Contact's Position

CTO

* Company City

Amsterdam

* Contact's Telephone Number

123-456-7890

Company Province

Company Postal Code

* Contact's Email Address

john.doe@abccorp.com

Company Registration Number

1234567890

Annual Travel Spend

€500.000 - €1.000.000

Type of Partnership

Travel

Annual Company Revenue

€2.000.000 - €5.000.000

Product of Interest

Corporate Card

BTA and/or Card opportunity

Additional information

Travel Management Company Actions To Date

12

Re-Submit

Close

13

Referrals Under Review162

See Complete Report

Annotations

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13

1

AMERICAN EXPRESS

MY ACCOUNTCARDSTRAVELREWARDSBUSINESS

2

United States (Change Country)

LOG IN

Search

5

Rejected Referrals to Review

9

See Complete Report

6	Company v	Contact Name v	Submitted Date v	Partner v	Partner Type v
	ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A
	ABC Corp.	John Doe	Jul 15, 2013	XYZ LLC	Type A

7

Rejected: Aug 06, 2013

Submitted By: Jane Smith, XYZ LLC. July 25, 2013

Reason for Rejection: Insufficient annual spend

Referral Reference ID: 12345678

Close

8

Company Name

ABC Corp

* Company Street Address

123 Main St

* Company City

Amsterdam

Company Province

Company Postal Code

Company Registration Number

1234567890

Type of Partnership

Travel

Product of Interest

Corporate Card

Additional information

Re-Submit

Close

9

Main Contact First Name

John

* Main Contact Last Name

Doe

Contact's Position

CTO

* Contact's Telephone Number

123-456-7890

* Contact's Email Address

john.doe@abccorp..com

10

Annual Travel Spend

€500.000 - €1.000.000

Annual Company Revenue

€2.000.000 - €5.000.000

BTA and/or Card opportunity

Travel Management Company Actions To Date

11

Additional information

Travel Management Company Actions To Date

12

Re-Submit

Close

13

Referrals Under Review

162

See Complete Report

Annotations

1

AMERICAN EXPRESS

5

6

7

8

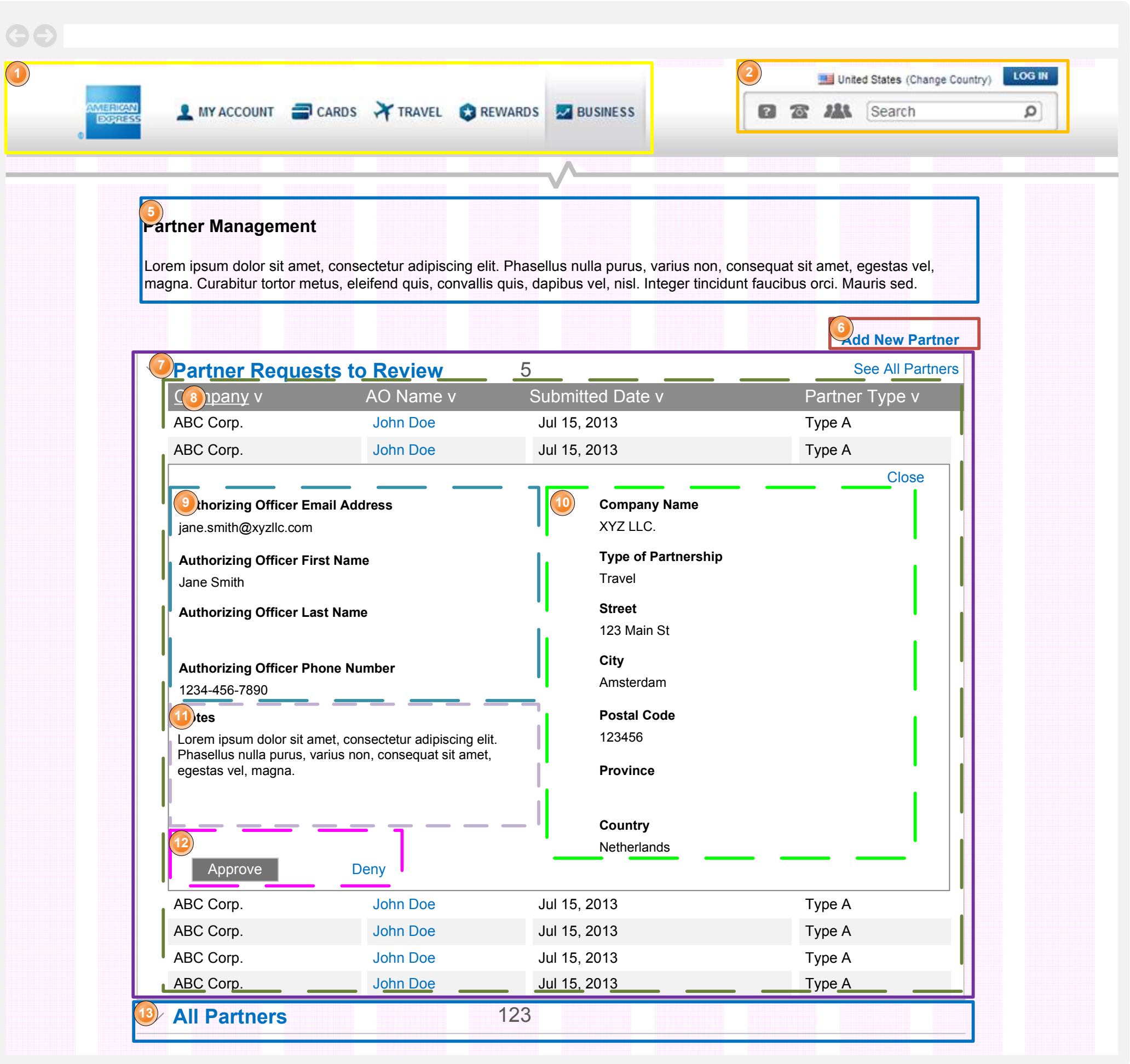
9

11

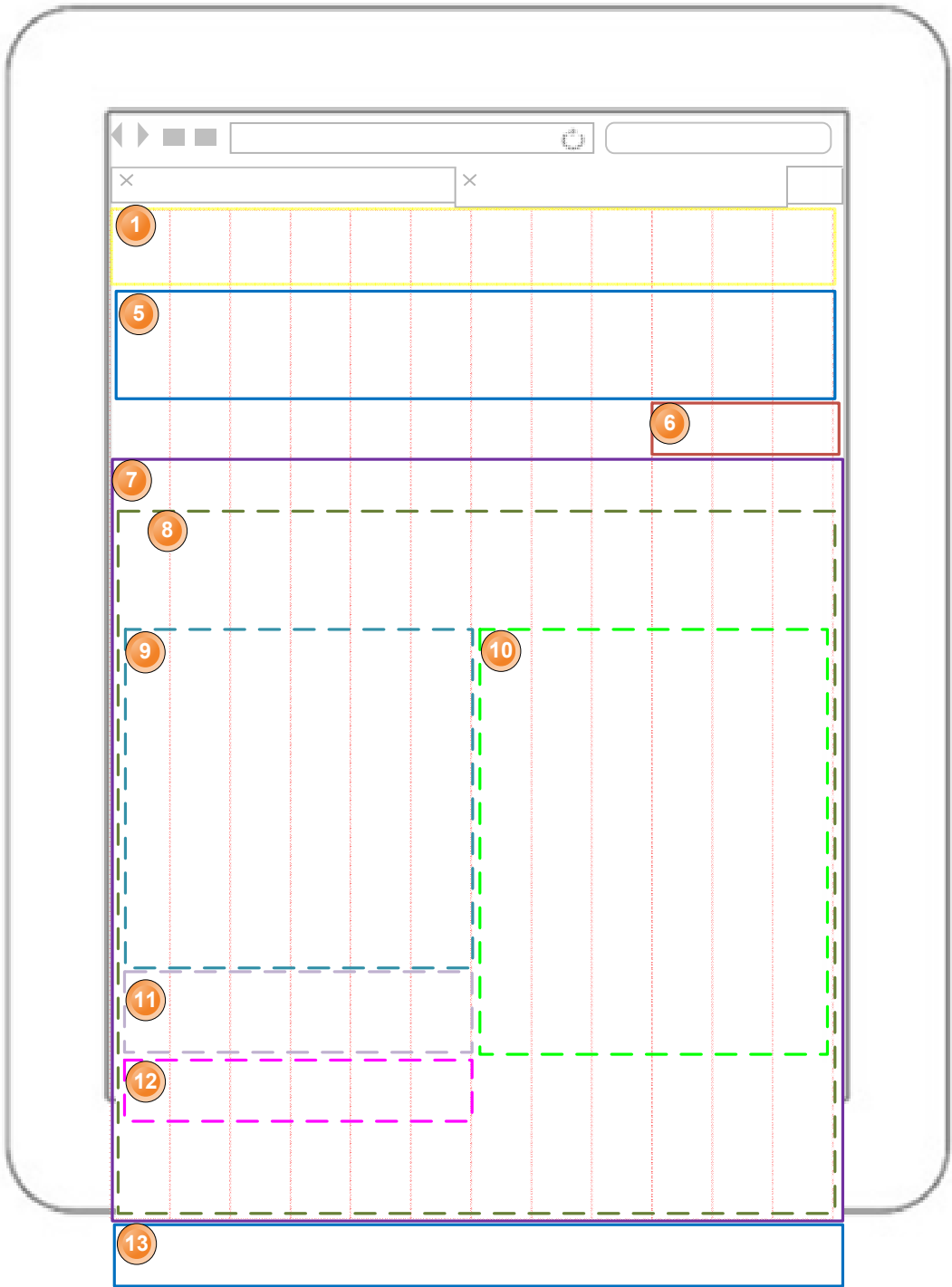
12

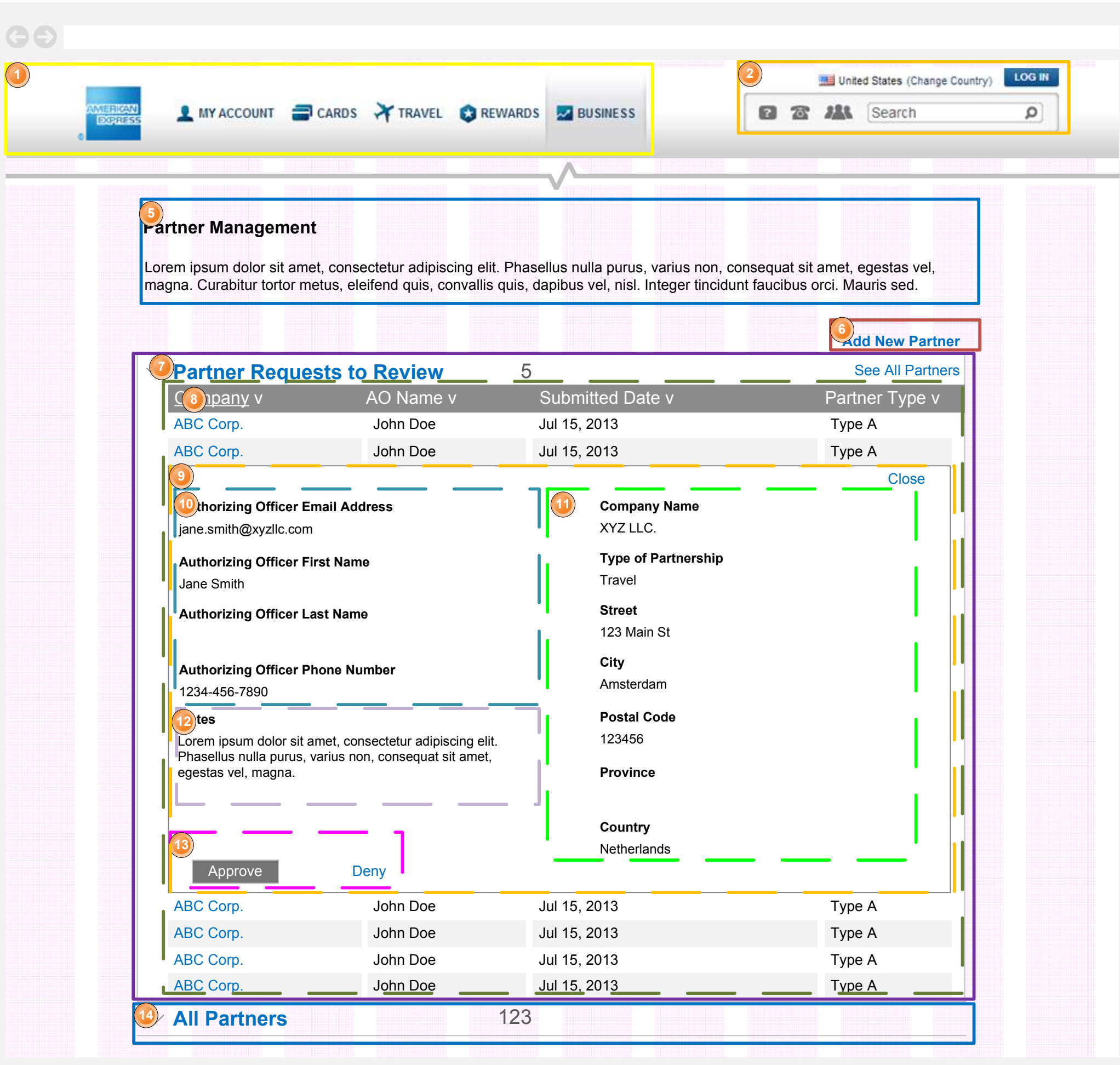
13

6. As the width decreases, the columns become hidden in the following order: Partner Type, Submitted Date, Contact Name, Partner
7. The "Close" link changes to an "X" at this screen width.
8. This layout applies to the read-only, "Under Review" details page also.

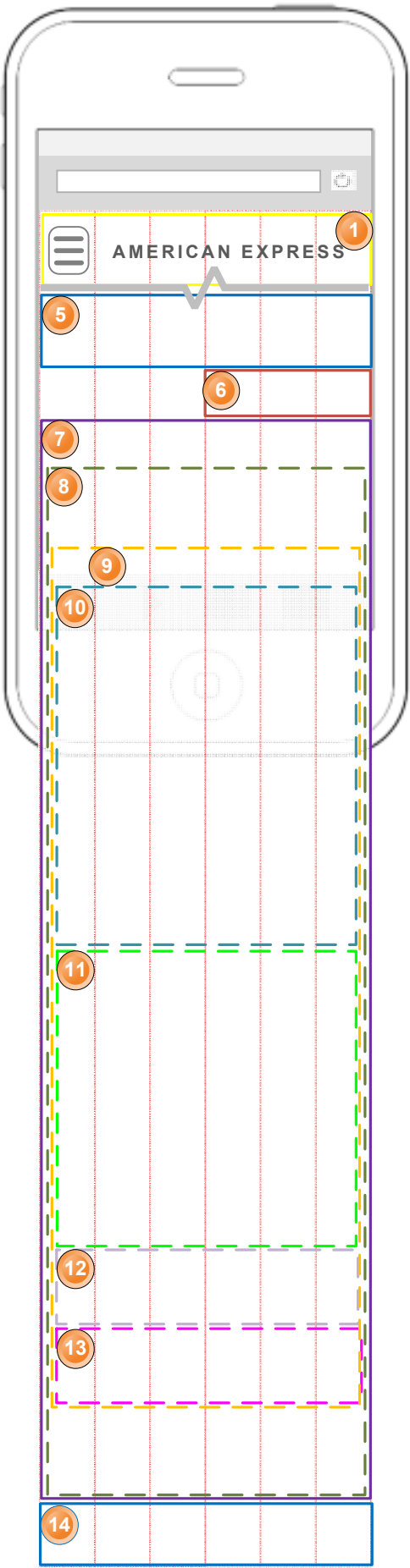


Annotations

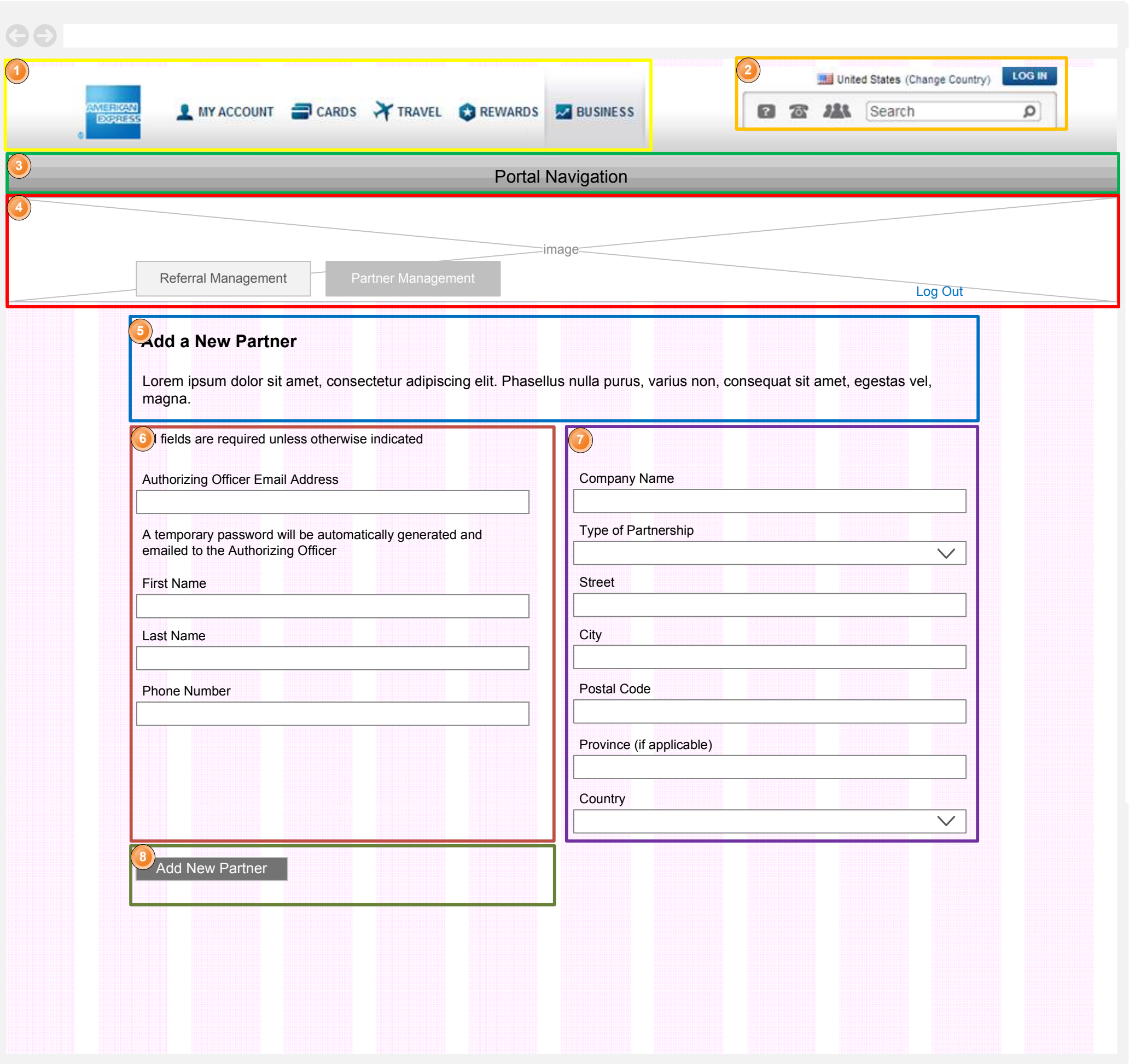




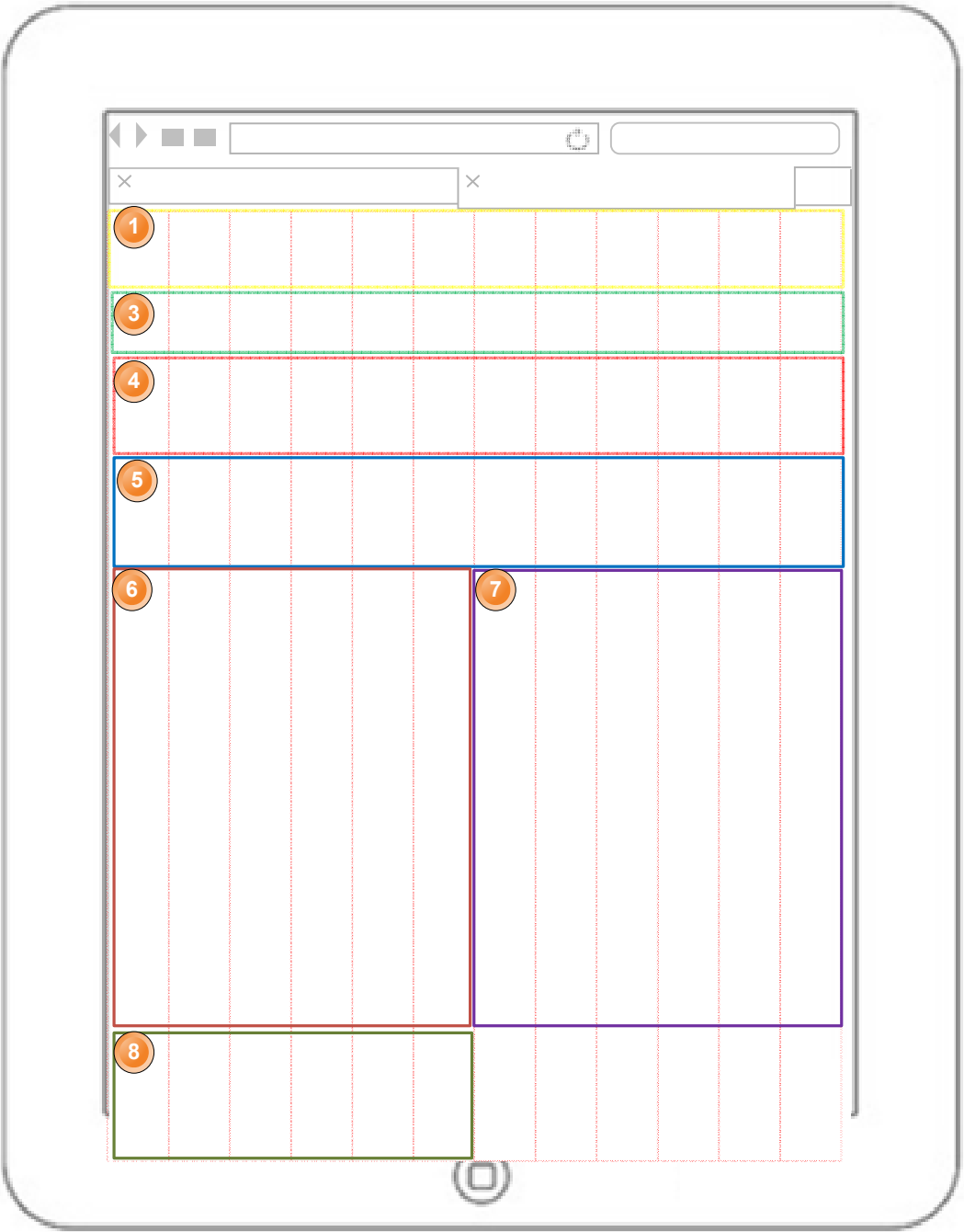
Annotations



8. As the width decreases, the columns become hidden in the following order:
Partner Type, Submitted Date, AO Name
9. The "Close" link becomes an "X" at this screen width.



Annotations



1

AMERICAN EXPRESS

MY ACCOUNT

CARDS

TRAVEL

REWARDS

BUSINESS

2

United States (Change Country)

LOG IN

?

Search

3

Portal Navigation

4

Referral Management

Partner Management

Log Out

5

Add a New Partner

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna.

6

fields are required unless otherwise indicated

Authorizing Officer Email Address

A temporary password will be automatically generated and emailed to the Authorizing Officer

First Name

Last Name

Phone Number

7

Company Name

Type of Partnership

Street

City

Postal Code

Province (if applicable)

Country

8

Add New Partner

Annotations

1

AMERICAN EXPRESS

4

Referral Management

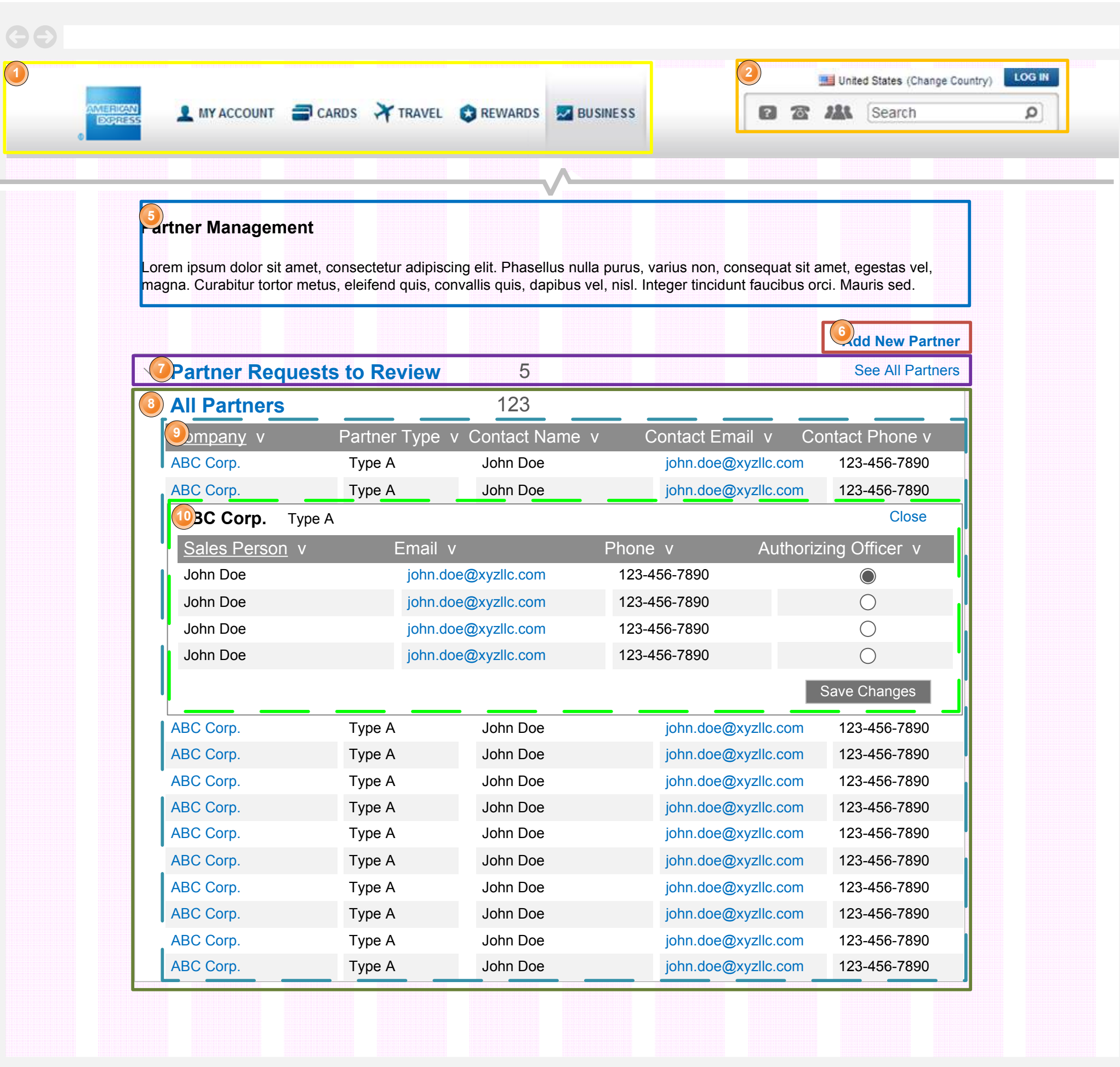
Partner Management

5

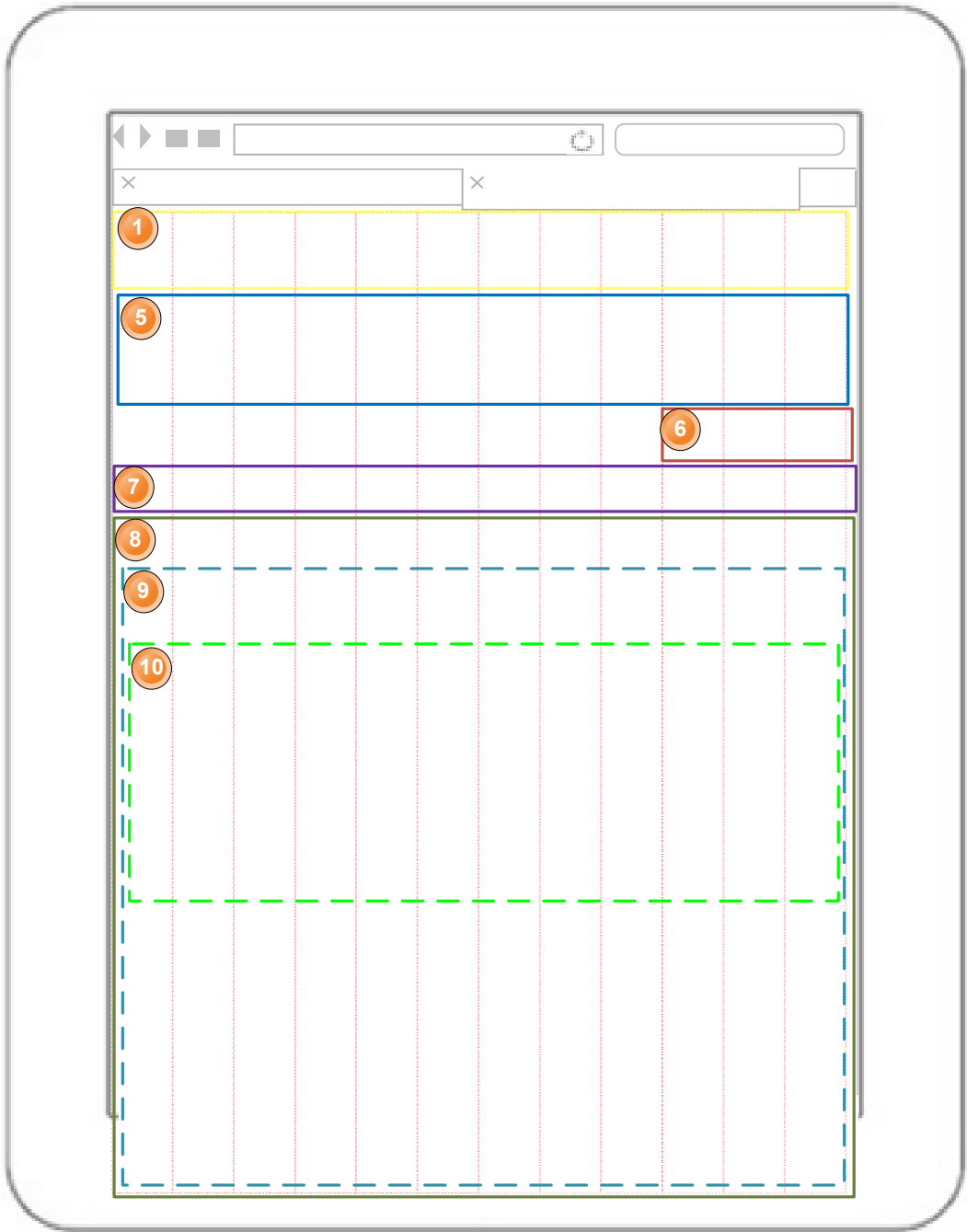
6

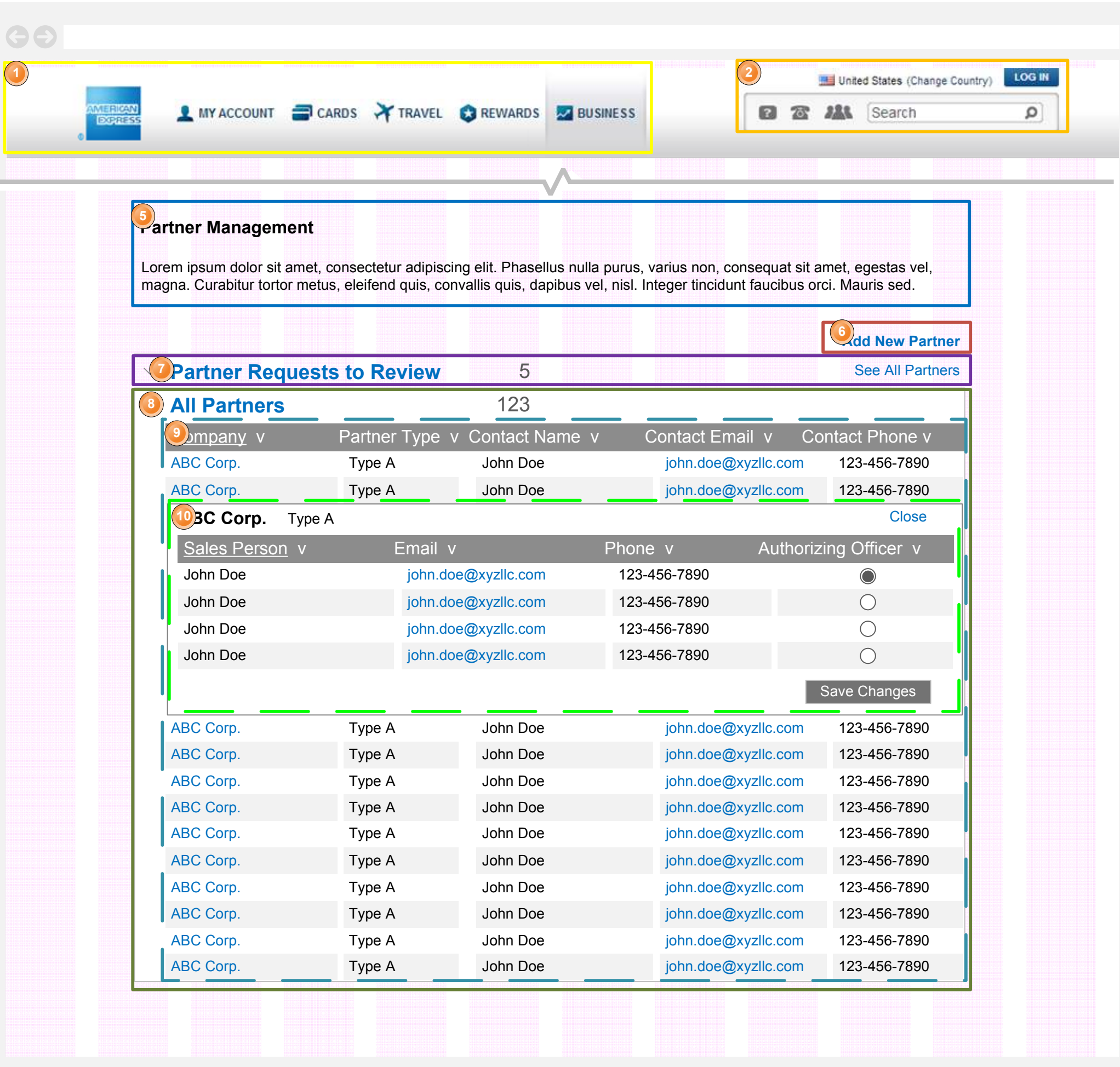
7

8

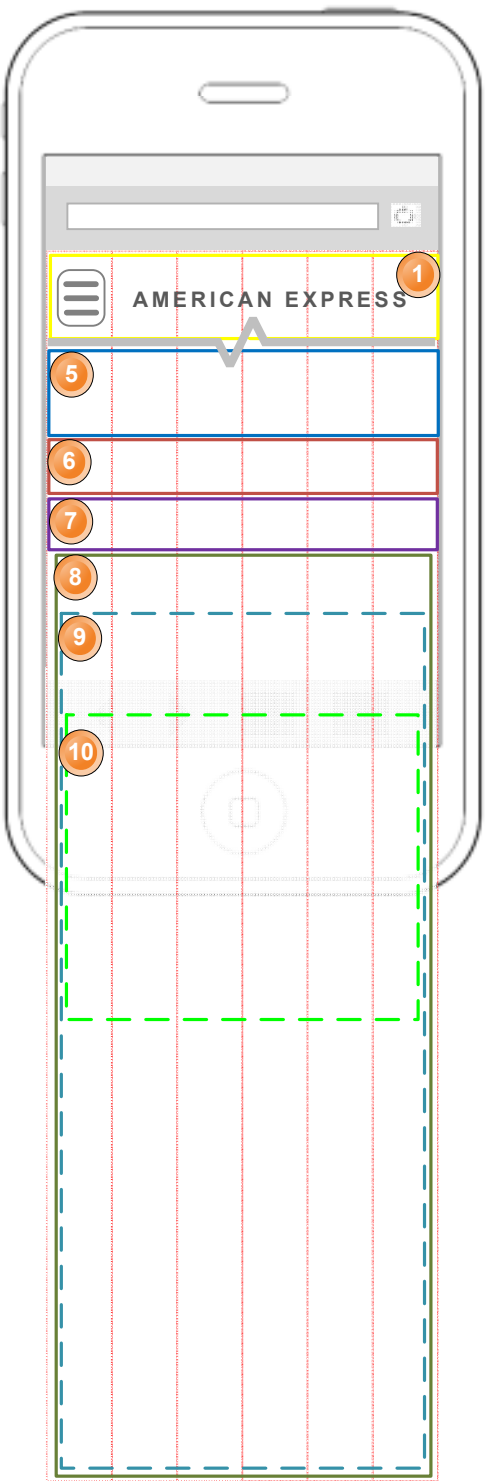


Annotations





Annotations



9. As the width decreases, the order in which the columns of the Partners table become hidden are Partner Type, Contact Phone, Contact Email, Contact Name.

10. The "Close" link becomes an "X" at this screen width. As the width decreases, the order in which the columns of the Partners table become hidden are Phone, Email. The Authorizing Officer header remains but the header label becomes an icon, or is hidden but the radio buttons remain.