

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

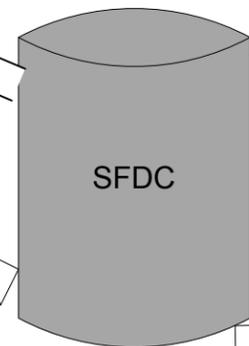
- Data fields will need to be localized to Market by Market
- View T&Cs and accept Partnership T&C's online. Also view these T&Cs when logged in.
- Partner Subscription Centre to provide control over marketing and Promo emails. Provide opt in email choices. Subscription Center to be house inside Eloqua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

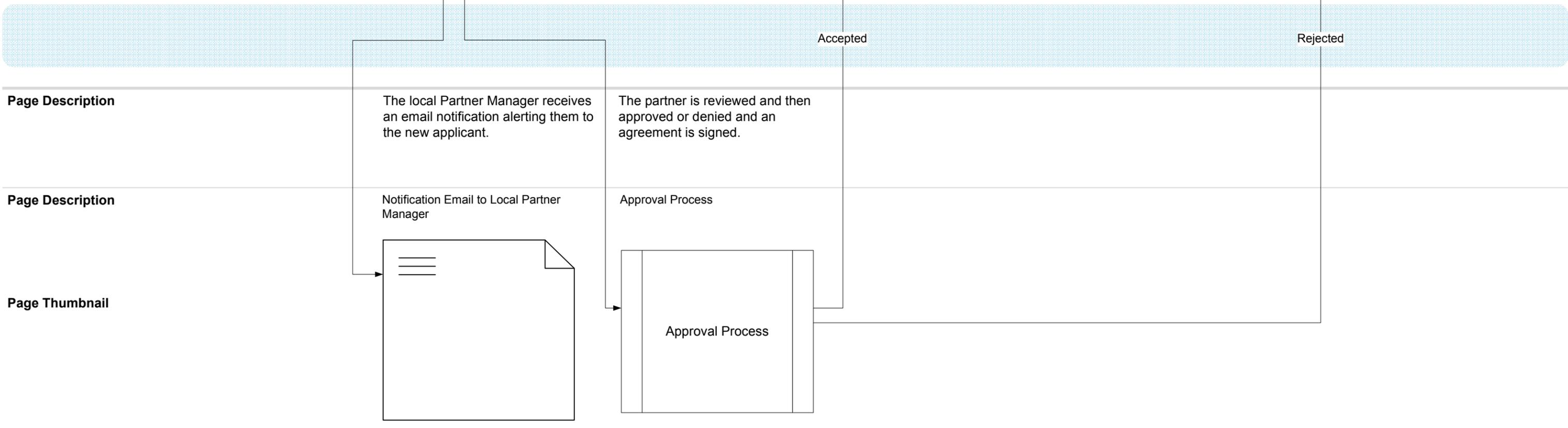


Use case: Partner Signup

Primary Persona: Partner User

Page Description	Company A would like to be an AMEX Partner. A representative from that company visits the Partner Portal website and clicks the "Signup" link.	The user fills out all required fields and submits the form.	The user gets a message on the subsequent form thanking them for registering, and letting them know the next steps toward signing an agreement, and when they can start submitting referrals.	The applicant receives an email alerting them that they may start submitting referrals, and a link is provided to log in and begin submitting leads.	The applicant can then log in to the portal via the login screen and begin submitting leads and tracking their information.	If the partner does not meet the appropriate criteria, they receive an email alerting them that they have been rejected.
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Page Description	Home Page	Partner Signup Form	Submission Confirmation	Notification Email to Partner	Login Screen	Notification Email to Partner
Page Thumbnail						

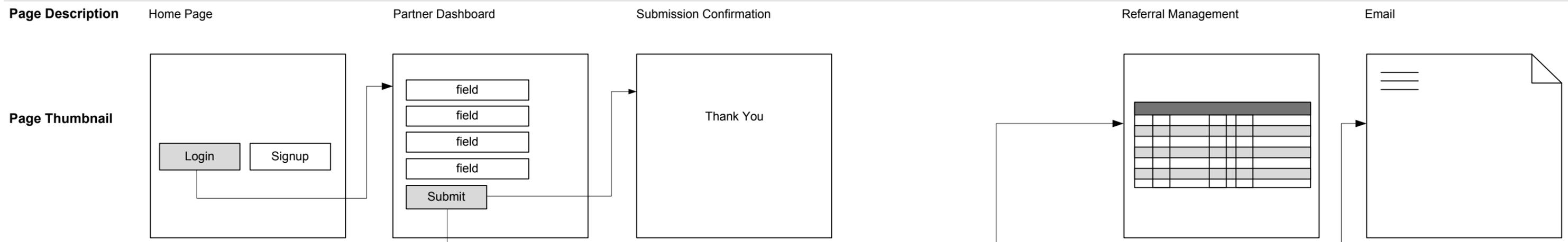




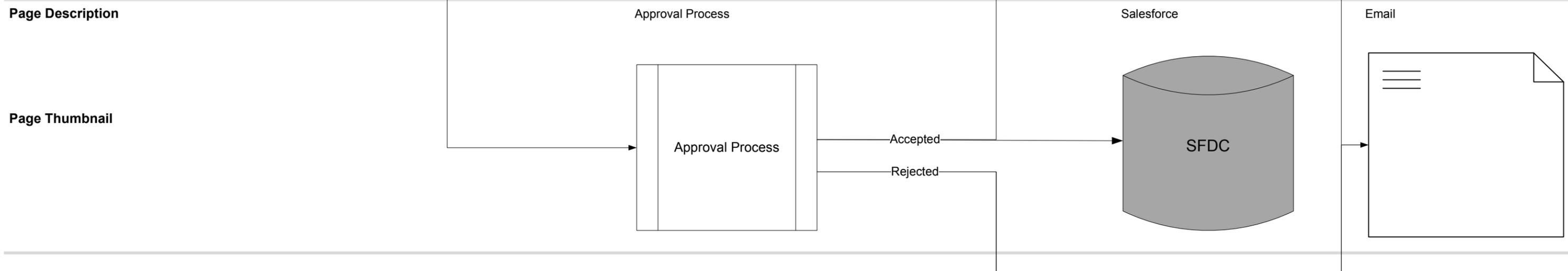
Use case: Submit Lead

Primary Persona: Partner User

Page Description Company A is a partner and has a new lead to submit to AMEX. Once the partner is logged in, their initial dashboard page contains a form to submit a new lead. The user gets a message on the subsequent page thanking them for their lead, and telling them to check their email and dashboard for the results. When the lead is accepted, it is added to the Partner's Referral Management pages where they can follow the progress of that lead. If the lead is rejected, the Partner receives a notification saying so.



Page Description The lead is sent to InfoGroup / UPD for validation and de-dup processing. The lead is submitted to SFDC. The local Partner Manager receives an email notification alerting them to the newly rejected lead.





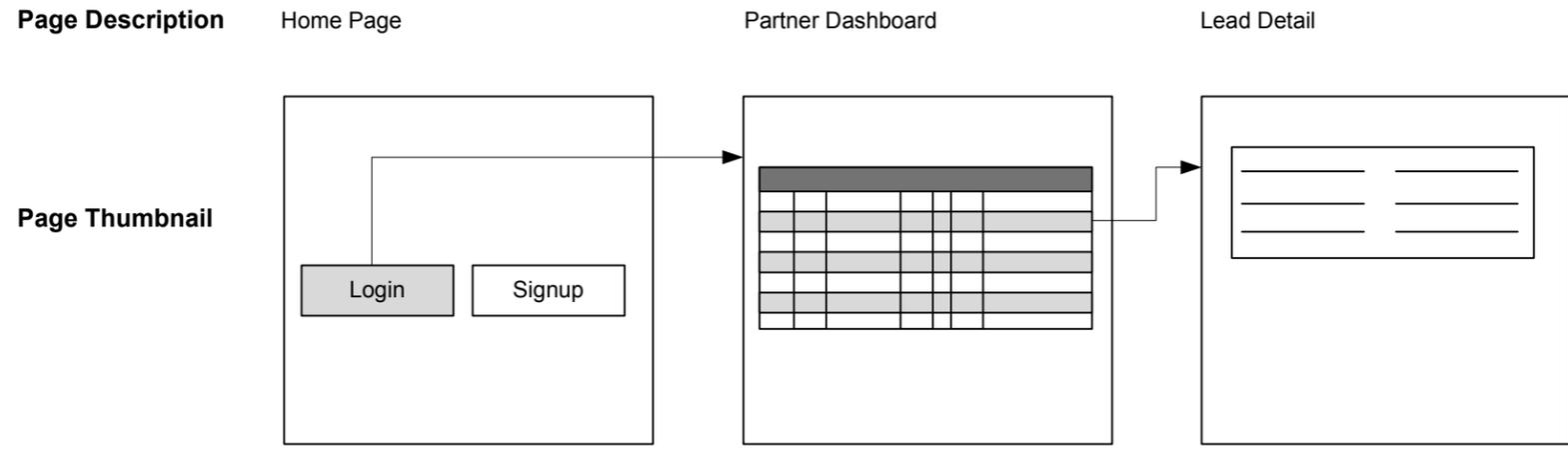
Use case: Login to View Lead Progress Details

Primary Persona: Partner User

Page Description Company A is a Partner and logs into the portal

Once the partner is logged in, their initial Referral Management page provides access to their referrals

The Partner can drill into a lead referral list to view the details and status of a particular lead and see if that lead has been accepted, rejected, become a customer, their current financials (?), and more (?).



Page Description

Page Description

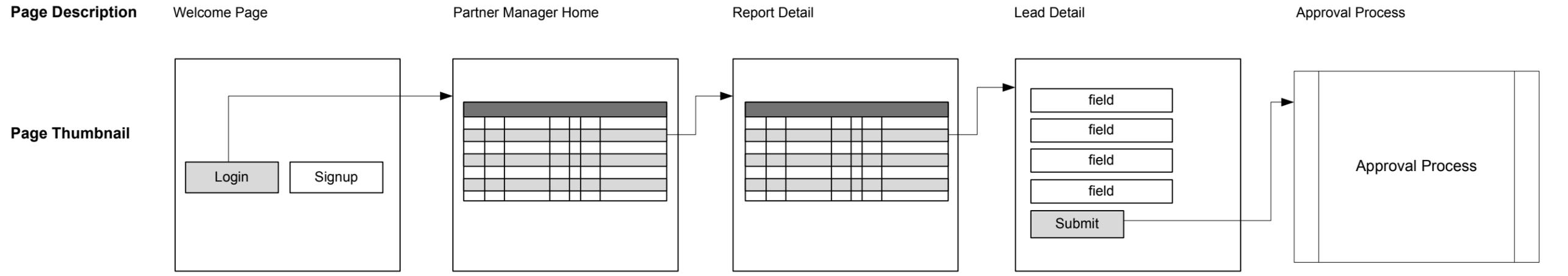
Page Thumbnail



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.



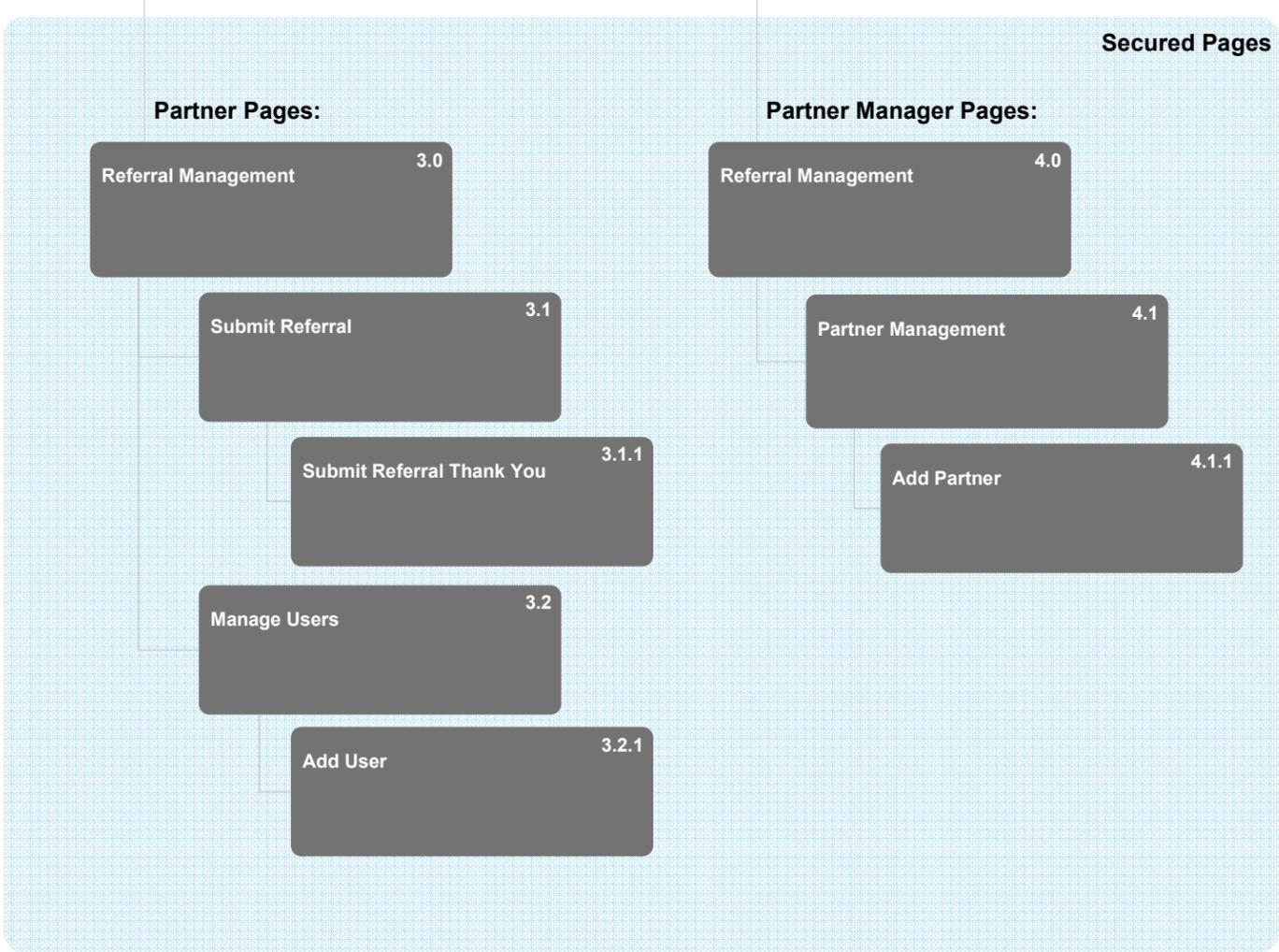
Page Description

Page Description

Page Thumbnail

Section 4:

Site Map



Key

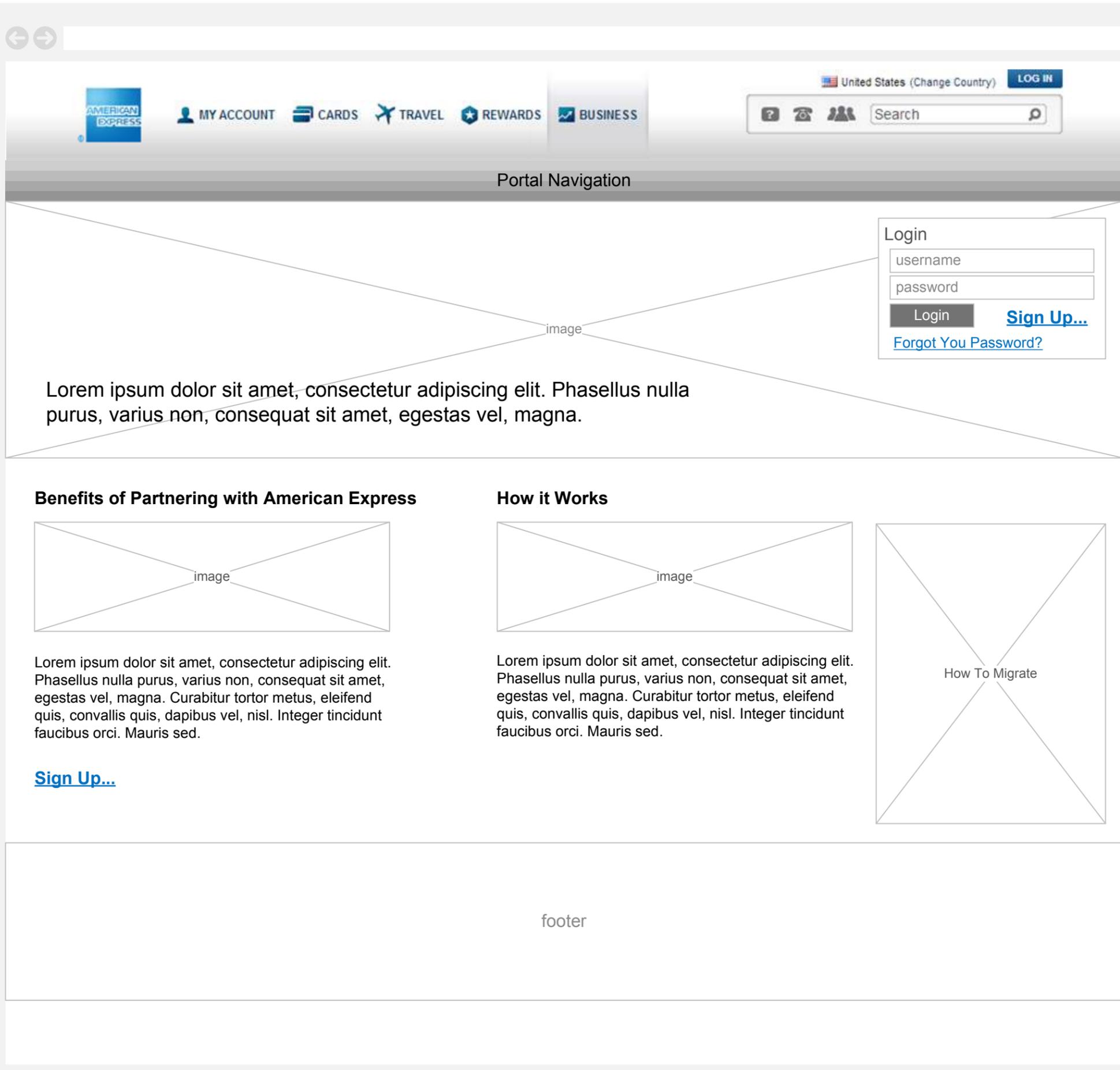
- Primary Page
- Utility Page
- Secondary Page
- Content Module
- Content needs to be developed
- Hierarchical Navigation
- Cross-Linked Navigation

Section 5:

Wireframes

Annotations

Persona: All
Site Map Page: 1.0



Portal Navigation

Login

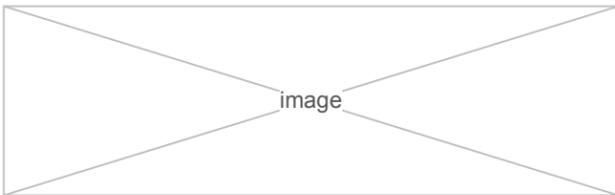
Login

[Sign Up...](#)

[Forgot You Password?](#)

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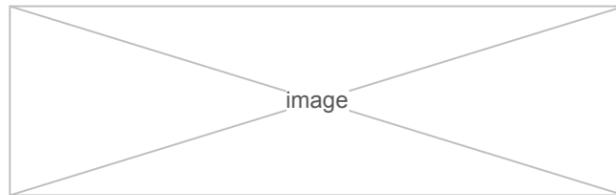
Benefits of Partnering with American Express



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[Sign Up...](#)

How it Works



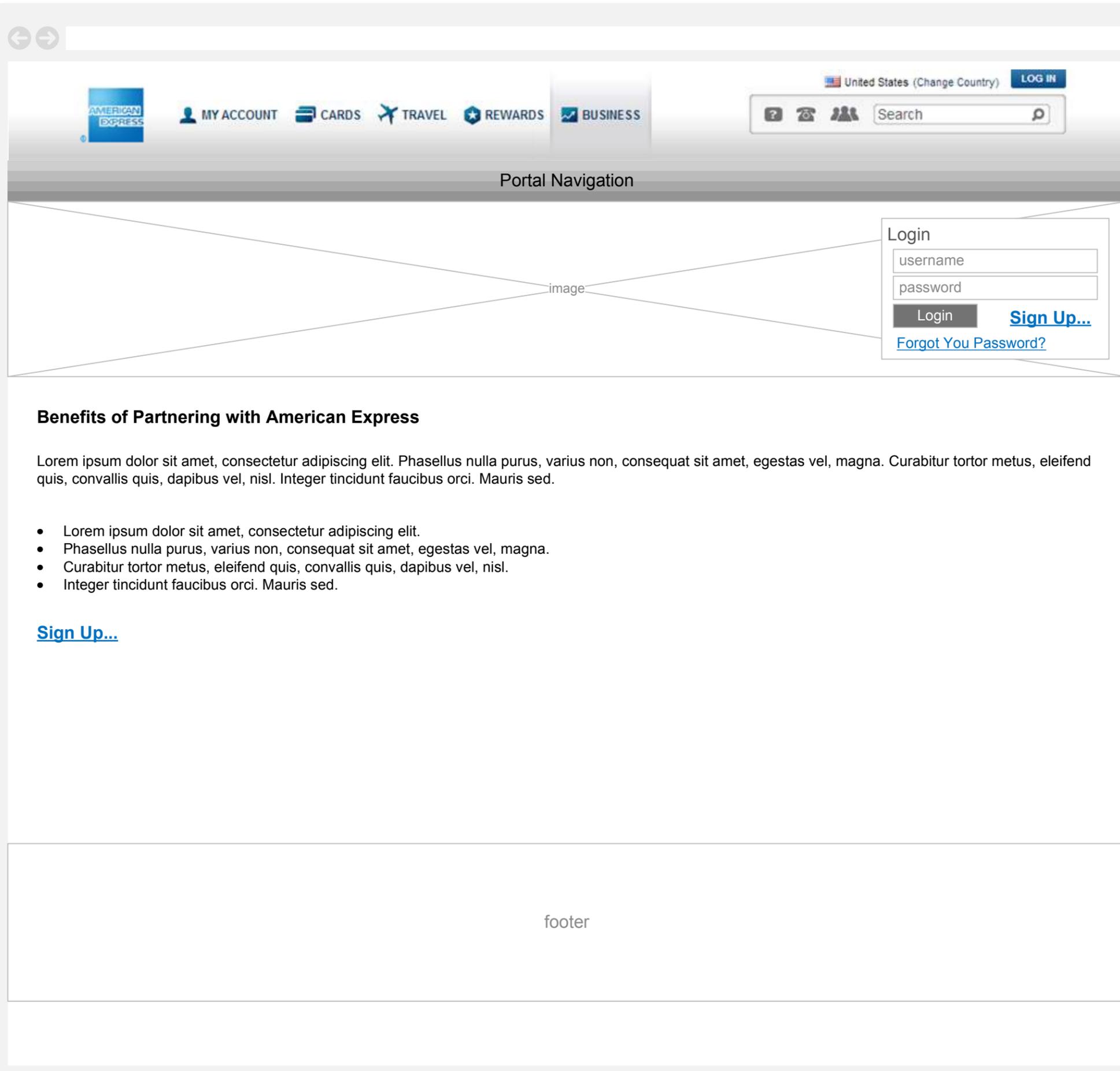
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How To Migrate

footer

Annotations

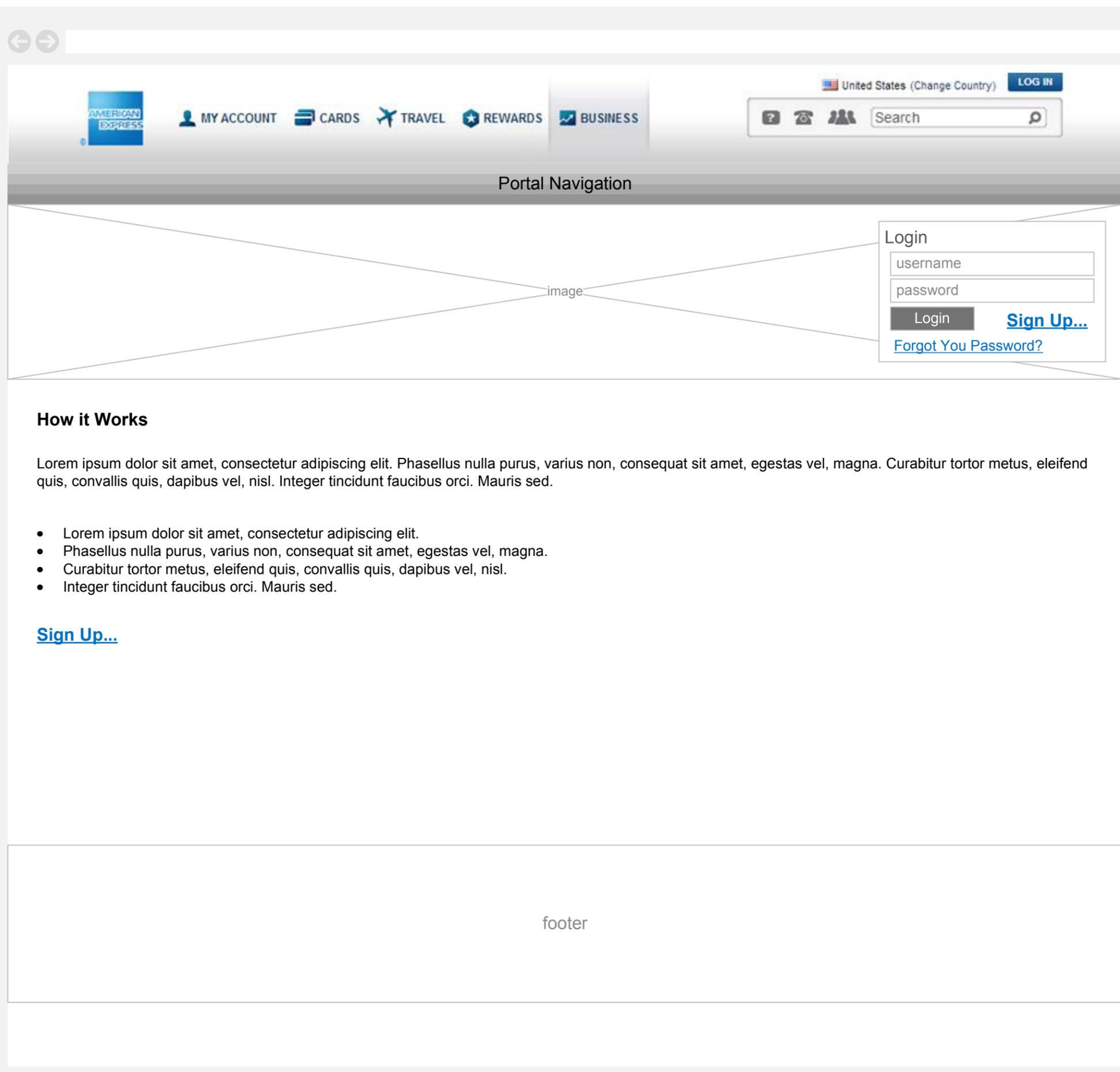
Persona: All
Site Map Page: 2.1



Annotations

Persona: All

Site Map Page: 2.2



Portal Navigation

image

Login

[Sign Up...](#)[Forgot You Password?](#)

How it Works

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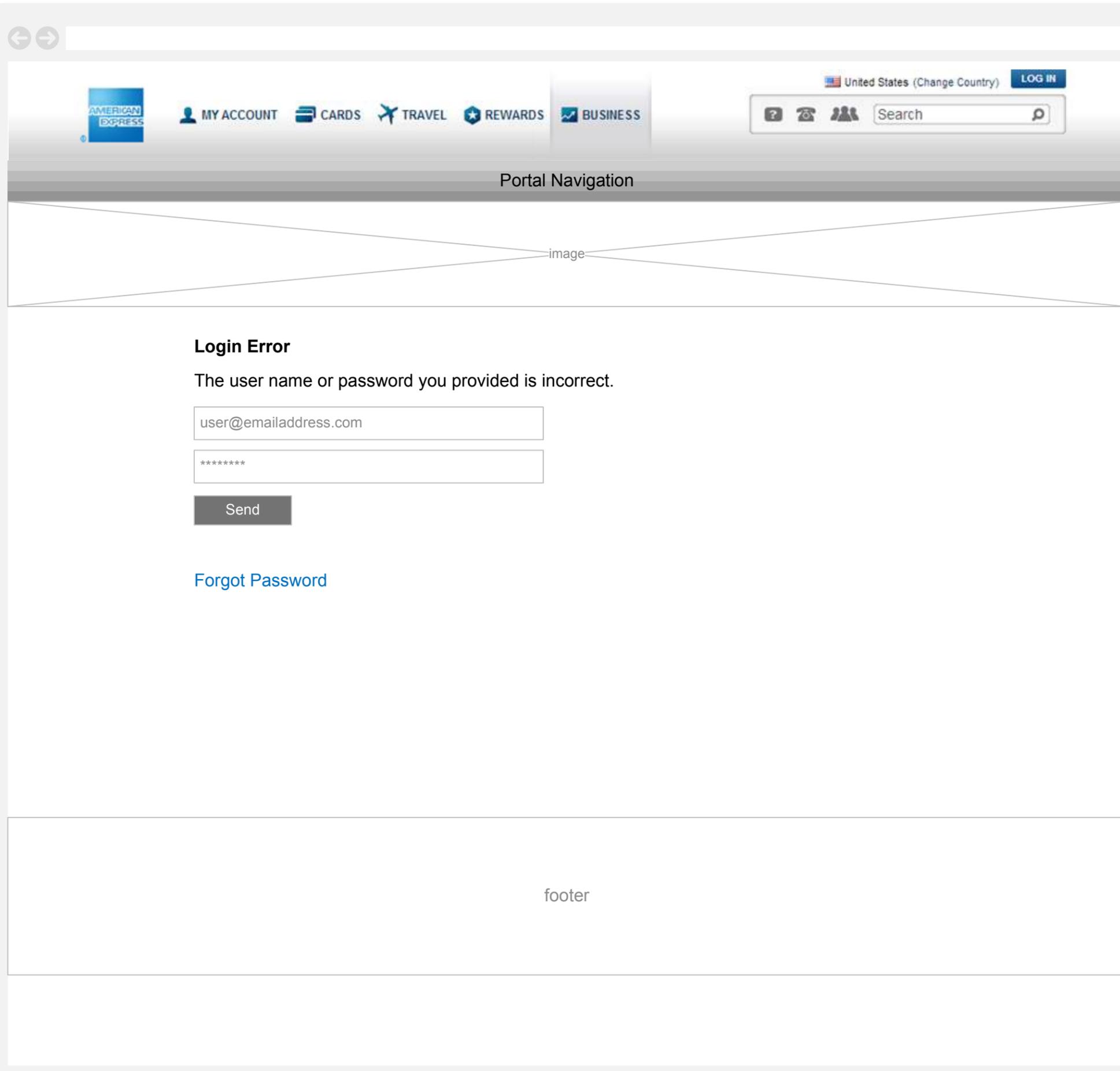
- Lorem ipsum dolor sit amet, consectetur adipiscing elit.
- Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna.
- Curabitur tortor metus, eleifend quis, convallis quis, dapibus vel, nisl.
- Integer tincidunt faucibus orci. Mauris sed.

[Sign Up...](#)

footer

Annotations

Persona: All
Site Map Page: 1.1



Annotations

Persona: All
Site Map Page: 1.2

The wireframe shows a browser window with the American Express logo and navigation links: MY ACCOUNT, CARDS, TRAVEL, REWARDS, and BUSINESS. A search bar is located on the right with a 'LOG IN' button. Below the navigation is a 'Portal Navigation' bar. A large 'image' placeholder is shown with a large 'X' over it. The main content area is titled 'Forgot Password' and contains the following text: 'Enter your email address associated with your account, and we will send you an email with a link to reset your password.' Below this text is an input field labeled 'Email' and a 'Send' button. At the bottom of the page is a 'footer' placeholder.

United States (Change Country) LOG IN

AMERICAN EXPRESS

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

Search

Portal Navigation

image

Forgot Password

Enter your email address associated with your account, and we will send you an email with a link to reset your password.

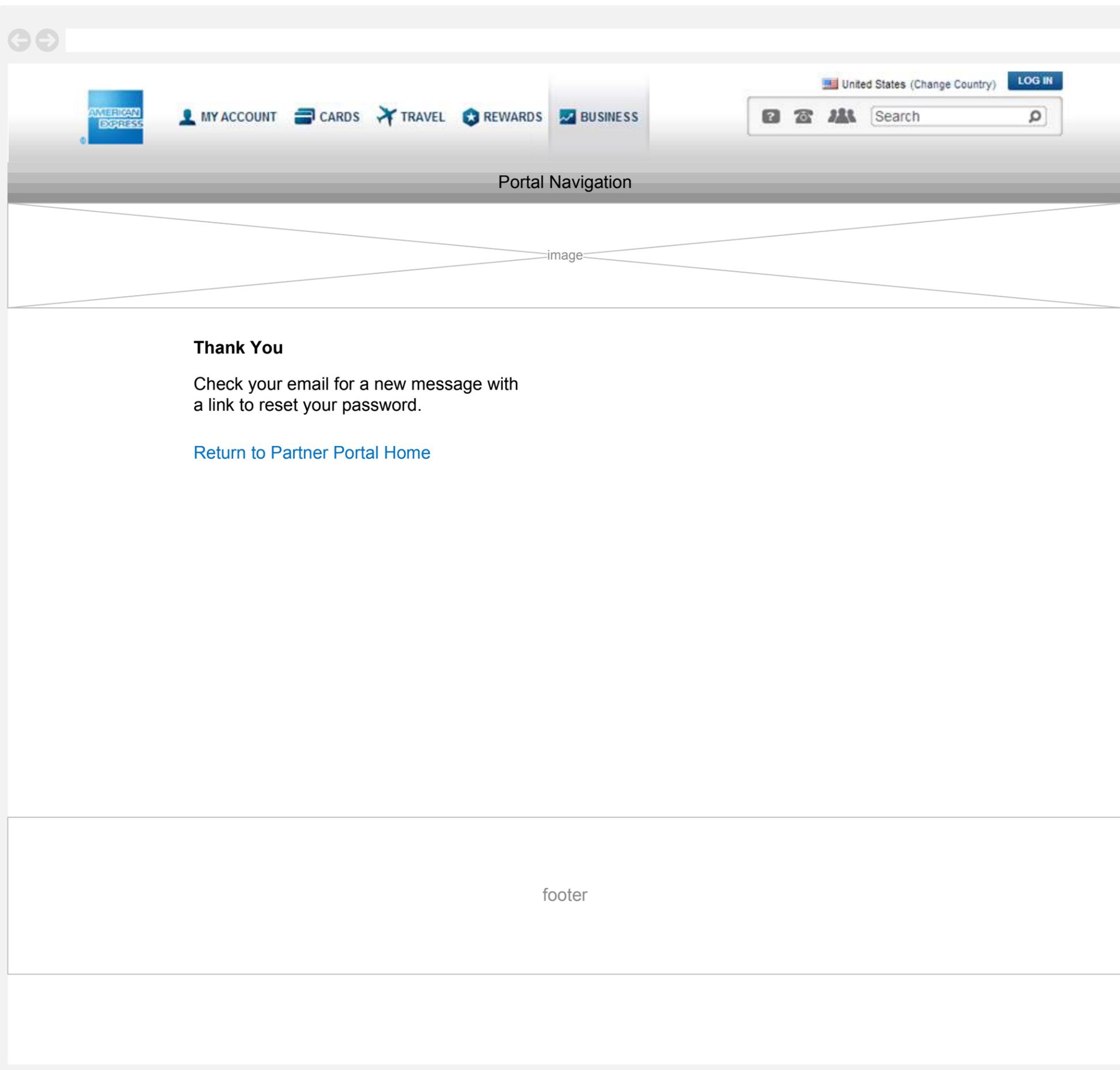
Email

Send

footer

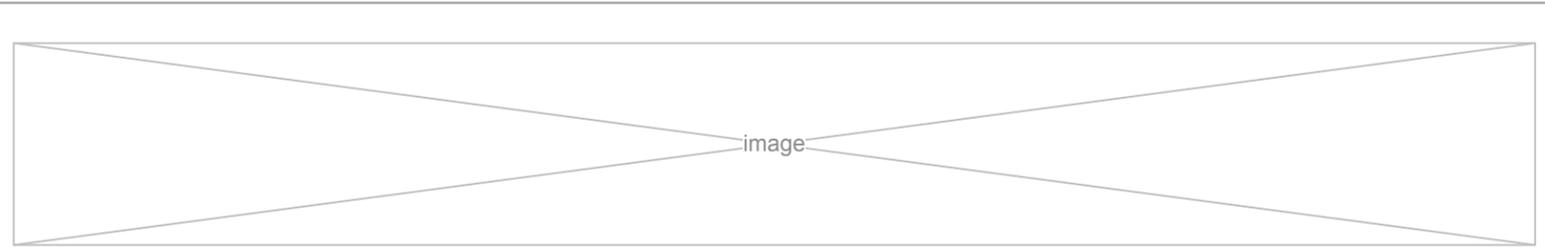
Annotations

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

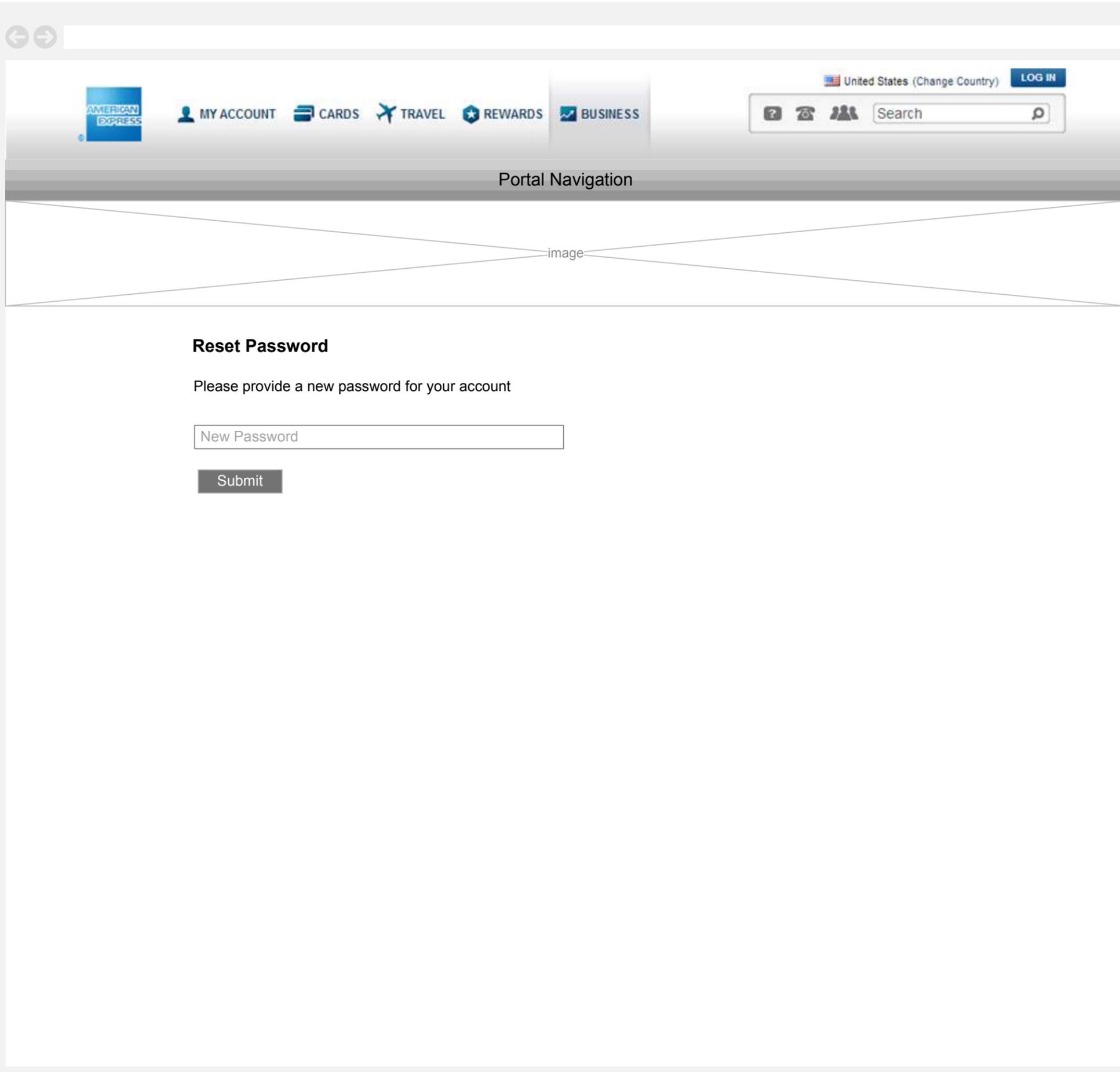
Persona: All
Site Map Page: 1.2.2

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

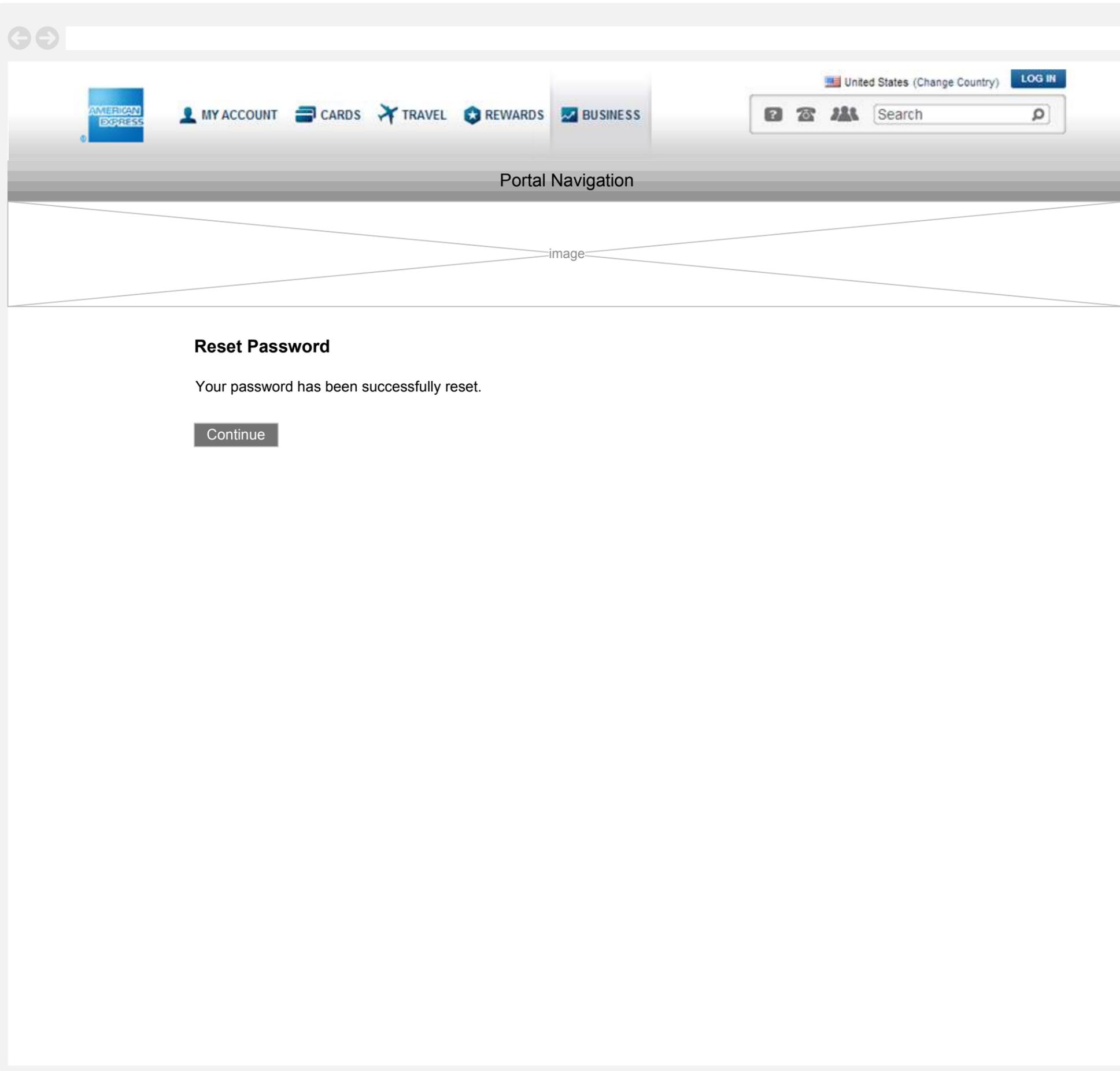


Annotations

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)



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

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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



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

[MY ACCOUNT](#)[CARDS](#)[TRAVEL](#)[REWARDS](#)[BUSINESS](#)

United States (Change Country)

LOG IN



Search



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)

Password

Confirm Password

First Name

Last Name

Phone Number

Comments (Optional)

 I agree to the [Terms & Conditions](#) of this website I would like to receive emails from American Express regarding p

Submit

Company Information

Company Name

Type of Partnership (Optional)

Street Address 1

Street Address 2 (if applicable)

Street Address 3 (if applicable)

City

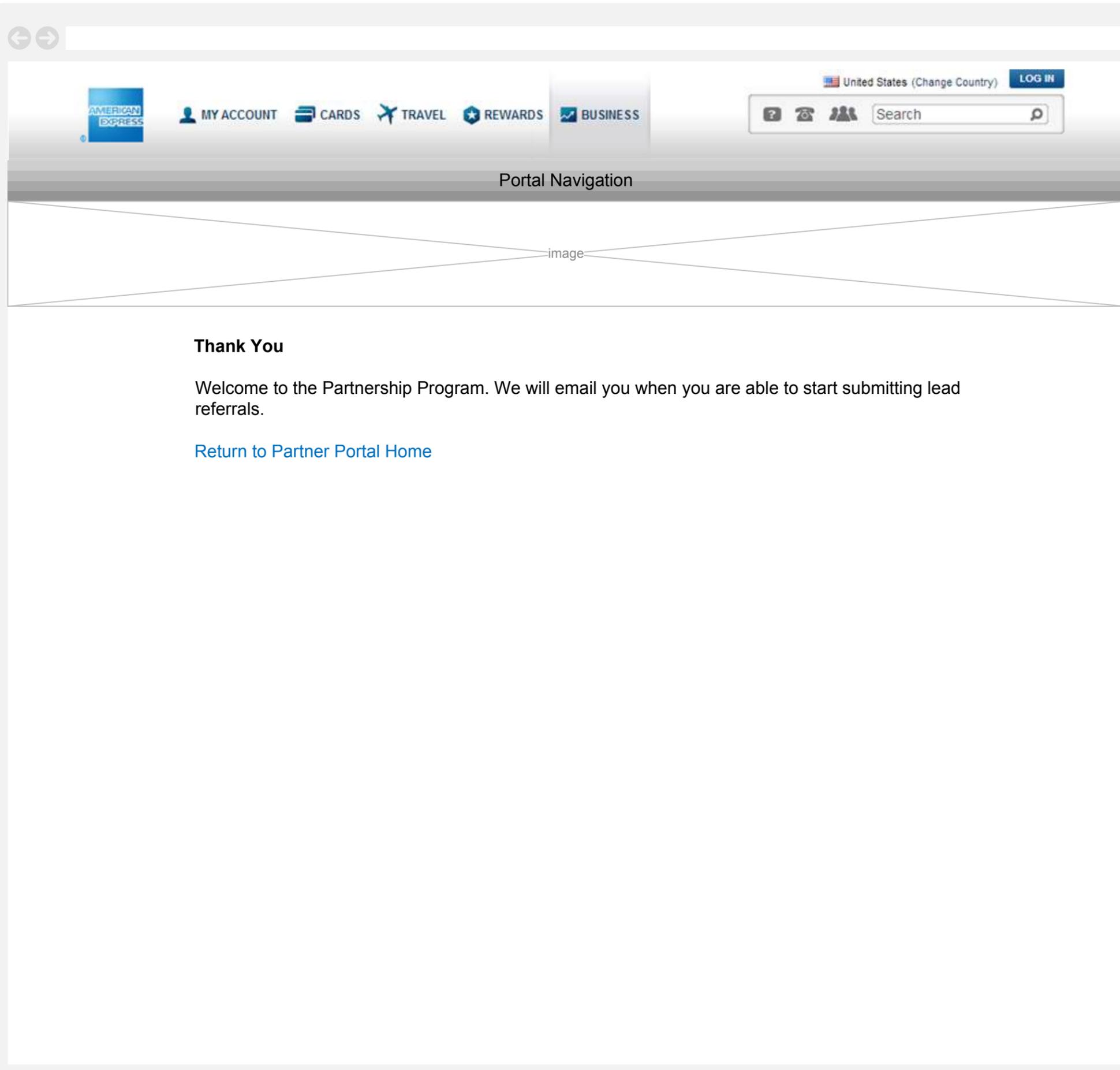
Postal Code

Country

- UK
- Germany
- France
- Spain
- Italy
- Netherlands
- Sweden
- Denmark

Annotations

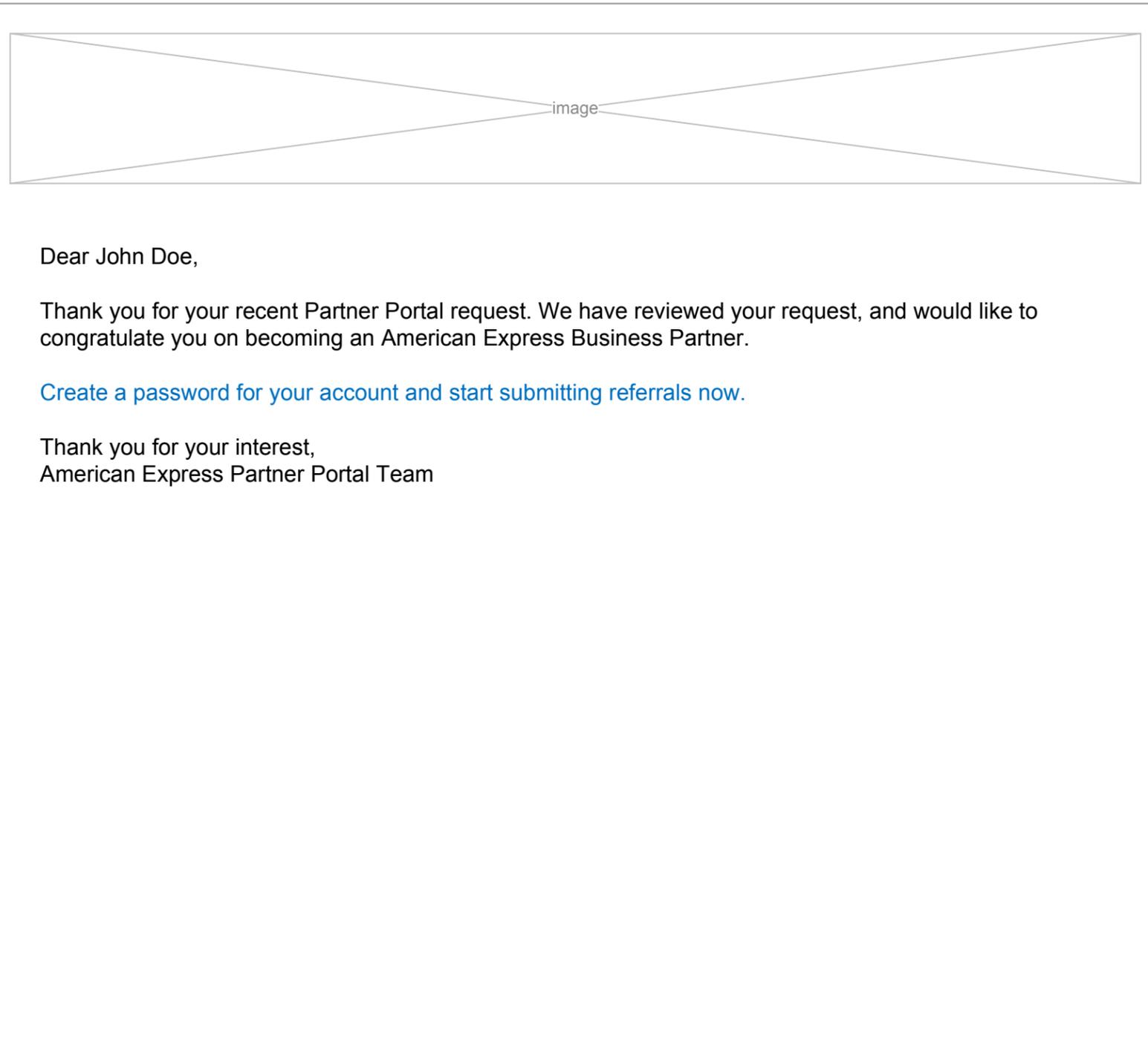
Persona: (Potential) Partner
Site Map Page: 1.4.1



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.



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.

The wireframe shows a browser window with the American Express logo and navigation links: MY ACCOUNT, CARDS, TRAVEL, REWARDS, and BUSINESS. A search bar and a 'LOG IN' button are also visible. Below the navigation is a 'Portal Navigation' bar. A large 'image' placeholder is present. The main content area is titled 'Set Password' and contains the following text: 'You have been approved as an American Express Partner. In order to begin submitting Lead Referrals to American Express, you will need to finish creating your login. You will log in with your email address and the password you specify below.' Below this is the instruction 'Please provide a password for your new account' followed by a text input field labeled 'New Password' and a 'Submit' button.

Portal Navigation

image

Set Password

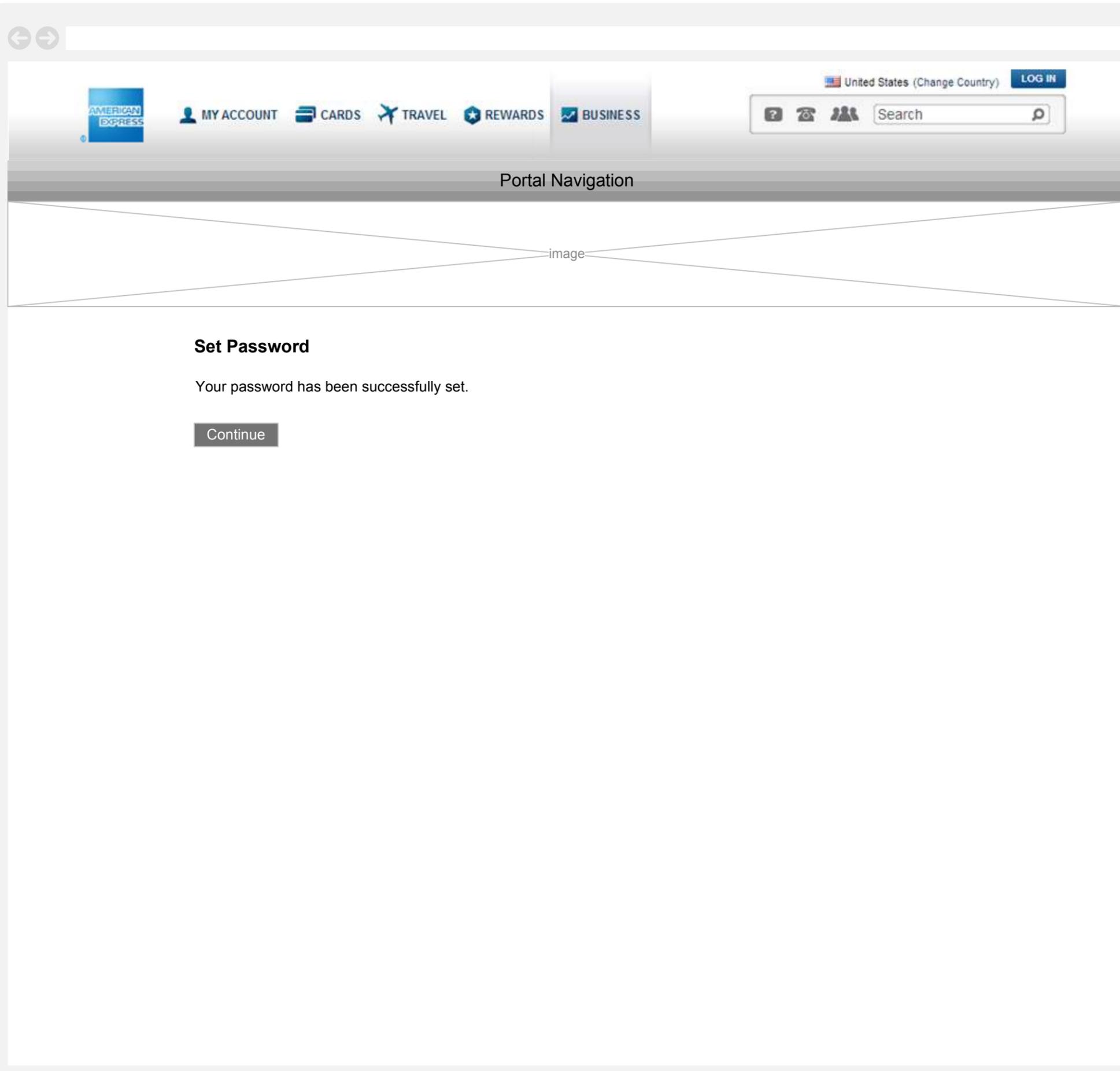
You have been approved as an American Express Partner. In order to begin submitting Lead Referrals to American Express, you will need to finish creating your login. You will log in with your email address and the password you specify below.

Please provide a password for your new account

Annotations

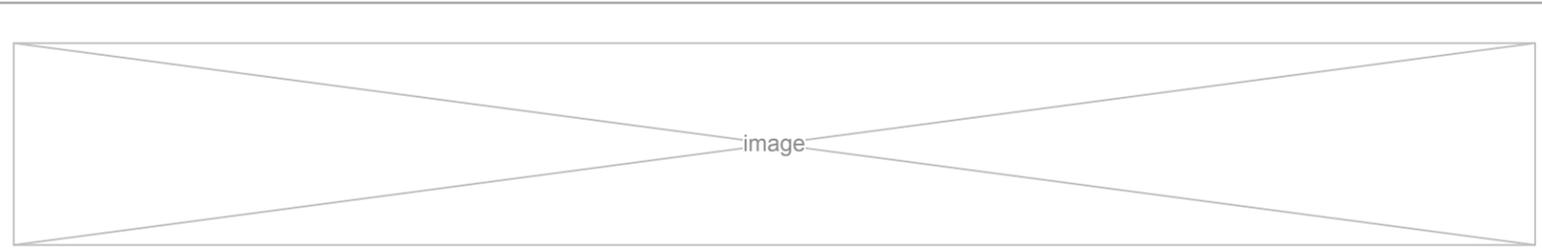
Persona: (New) Partner
Site Map Page: 1.5.1

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



Annotations

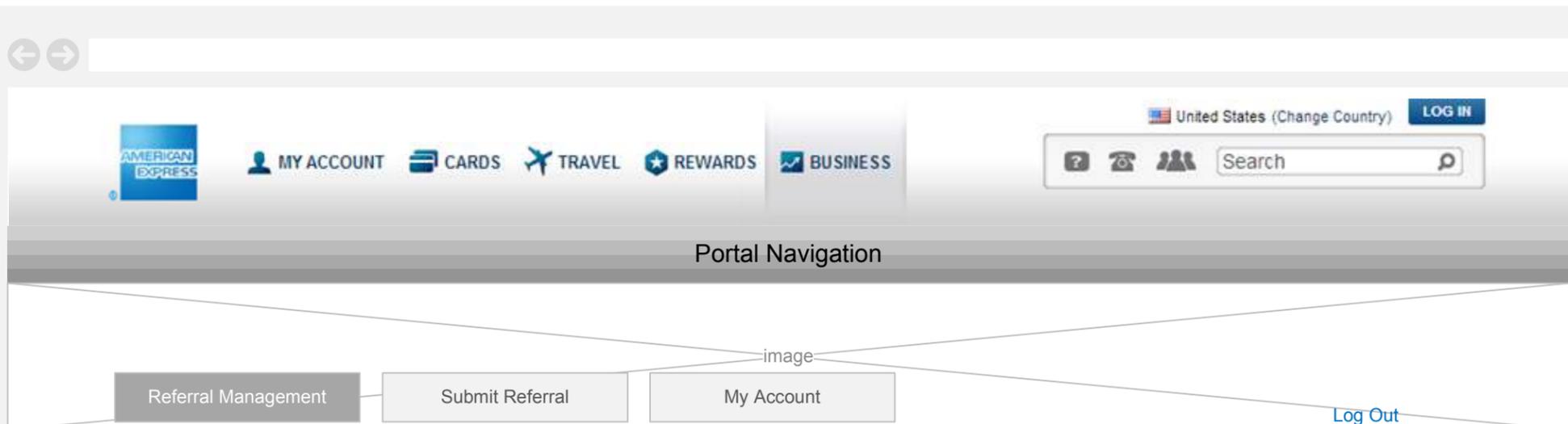
Persona: (Would-be) Partner



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



Referral Management

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.

American Express Corporate Card Representative

Spencer Nilsson

Spencer.J.Nilsson1@aexp.com

800-642-4333

Submit a New Referral

^ Referrals Under Review: 12

Account Name v	Contact Name v	Referral Date v	Submitted By v	Sales Person v	Sales Person Phone v
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890
ABC Corp.	John Doe	Jul 15, 2013	Tom Thomson	Jane Smith	123-456-7890

Previous Viewing rows 1-10 of 12 Next

∨ Referrals Assigned: 93

∨ Referrals Lost: 3

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.

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

? ☎ 👤 🔍

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

<p>Company Name <input style="width: 100%;" type="text"/></p> <p>Company Division <i>(optional)</i> <input style="width: 100%;" type="text"/></p> <p>Company Street Address 1 <input style="width: 100%;" type="text"/></p> <p>Company Street Address 2 <i>(if applicable)</i> <input style="width: 100%;" type="text"/></p> <p>Company Street Address 3 <i>(if applicable)</i> <input style="width: 100%;" type="text"/></p> <p>Company City <input style="width: 100%;" type="text"/></p> <p>Company Postal Code <input style="width: 150px;" type="text"/> Company Country <input style="width: 150px; text-align: center; border: none;" type="text" value="Germany"/></p> <p>Company Registration Number <i>(if applicable)</i> ? <input style="width: 100%;" type="text"/></p> <p>Additional information <input style="width: 100%; height: 50px;" type="text"/></p>	<p>Contact First Name <input style="width: 100%;" type="text"/> Contact Last Name <input style="width: 100%;" type="text"/></p> <p>Contact's Title <input style="width: 100%;" type="text"/></p> <p>Contact's Position ? <input style="width: 100%; border-bottom: 1px solid #ccc;" type="text" value="v"/></p> <p>Contact's Telephone Number <input style="width: 100%;" type="text"/></p> <p>Contact's Email Address <input style="width: 100%;" type="text"/></p> <p>Annual Company Revenue <i>(optional)</i> ? <input style="width: 100%; border-bottom: 1px solid #ccc;" type="text" value="v"/></p> <p>Annual Travel Spend <i>(optional)</i> ? <input style="width: 100%;" type="text"/></p> <p>Product of Interest <i>(optional)</i> ? <input style="width: 100%; border-bottom: 1px solid #ccc;" type="text" value="v"/></p> <p>Existing Competitor Products <i>(optional)</i> <input style="width: 100%;" type="text"/></p>
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Submit

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

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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

<p>Company Name</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Division <i>(optional)</i></p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Street Address 1</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Street Address 2 <i>(if applicable)</i></p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Street Address 3 <i>(if applicable)</i></p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company City</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Postal Code</p> <input style="width: 45%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Company Country</p> <input style="width: 45%; height: 25px; border: 1px solid #ccc; background-color: #eee; text-align: center; value: Germany;" type="text"/> <p>Company Registration Number <i>(if applicable)</i> ?</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Additional information</p> <div style="border: 1px solid #ccc; height: 60px; width: 95%; margin-top: 5px;"></div>	<p>Contact First Name</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Contact Last Name</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Contact's Title</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Contact's Position ?</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc; background-color: #eee;" type="text"/> <p>Contact's Telephone Number</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Contact's Email Address</p> <input style="width: 95%; height: 25px; border: 1px solid #ccc;" type="text"/> <p>Annual Company Revenue <i>(optional)</i> ?</p> <div style="border: 1px solid #ccc; padding: 2px;"> \$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 </div> <p>Product of Interest <i>(optional)</i> ?</p> <div style="border: 1px solid #ccc; padding: 2px;"> American Express Corporate Card Business Travel Account (BTA) American Express Corporate Meeting Card American Express Corporate Purchasing Card vPayment Unknown Other </div>
---	---

Submit

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:

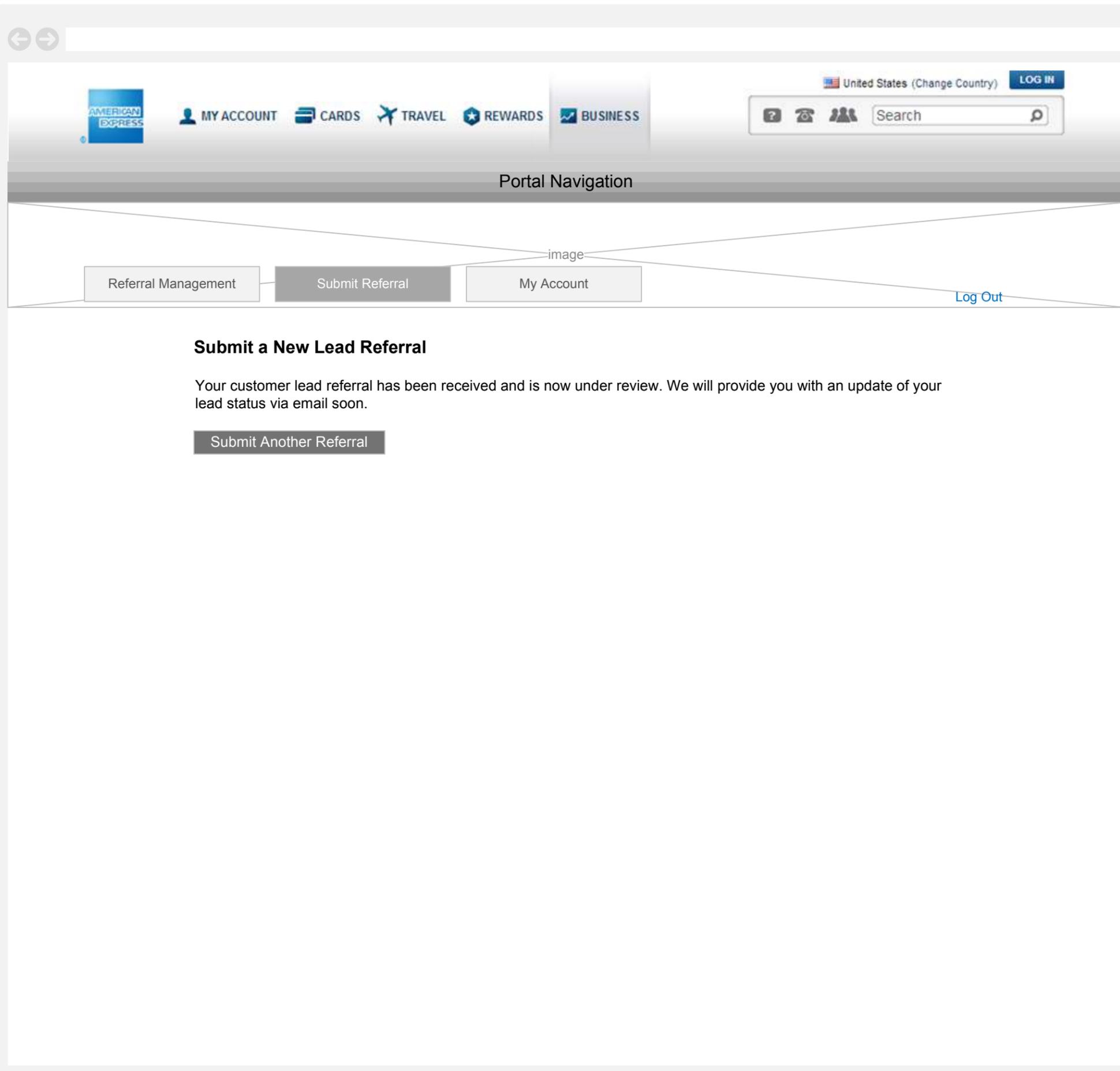
- \$500,000 - \$999,999
- \$1 Million - \$3.99 Million
- \$4 Million - \$9.99 Million
- \$10 Million - \$250 Million
- \$251 Million - \$2 Billion
- Over \$2 Billion

Annotations

Persona: Partner

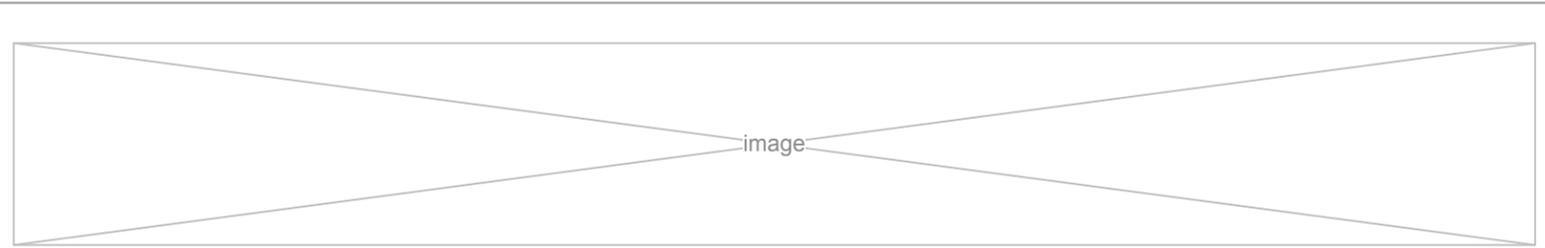
Site Map Page: 3.1.1

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,

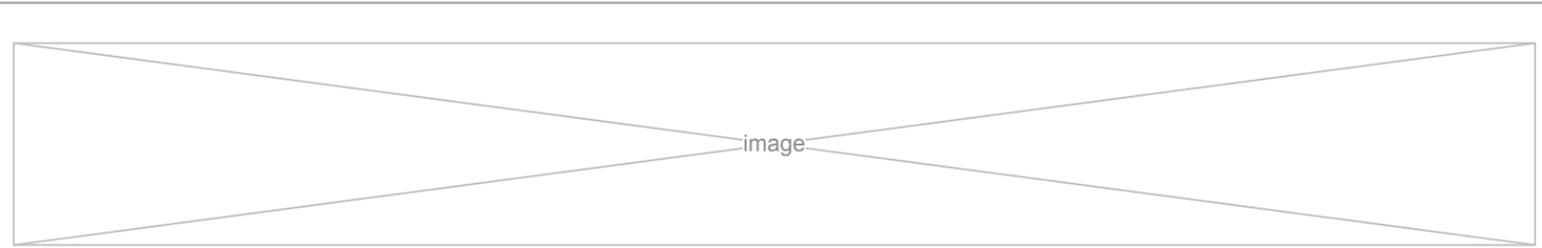
Thank you for your recent customer referral, **John Doe**. Your referral has been received and is being reviewed

[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 by 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.

United States (Change Country) LOG IN

AMERICAN EXPRESS MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

Portal Navigation

Referral Management Submit Referral My Account Manage Users Log Out

My Account

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Account Information

Authorizing Officer for ABC Corp.

Email Address (login username)
John.doe@abccorp.com

First Name
John

Last Name
Doe

Phone Number
123-456-7890

Company Information

Company Name
ABC Corp

Type of Partnership (Optional)
Type A

Street Address 1
123 Main St.

Street Address 2 (if applicable)

Street Address 3 (if applicable)

City
Amsterdam

Postal Code
123456

Country
Netherlands

Save

Change Password

Terms and Conditions

Annotations

Persona: Partner
Site Map Page: 1.3

← →

AMERICAN EXPRESS

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

United States (Change Country) LOG IN

Search

Portal Navigation

image

Referral Management Submit Referral My Account Log Out

My Account

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

∨ Account Information

∧ Change Password

Current Password

New Password

Confirm Password

Submit

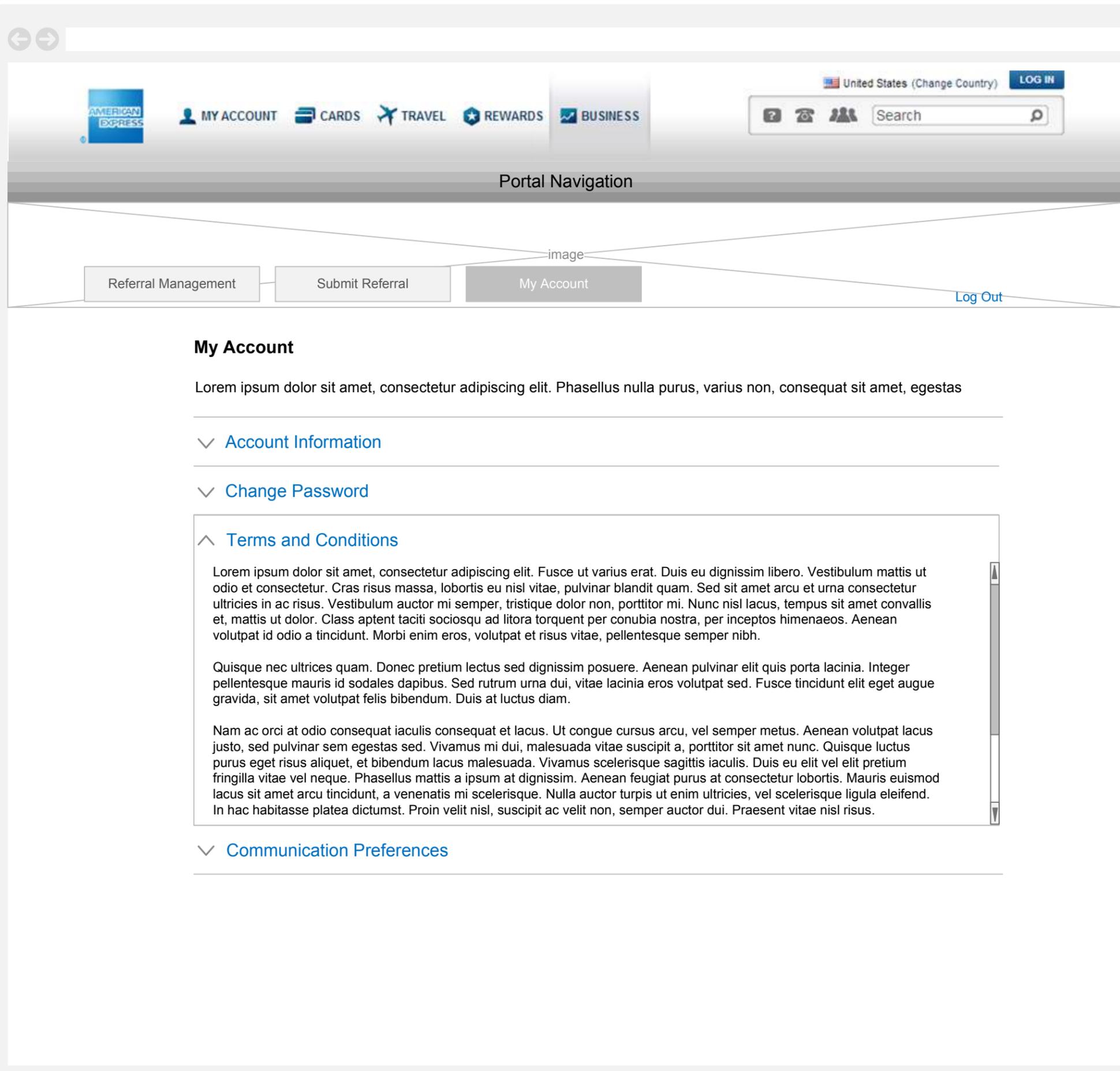
∨ Terms and Conditions

∨ Communication Preferences

Annotations

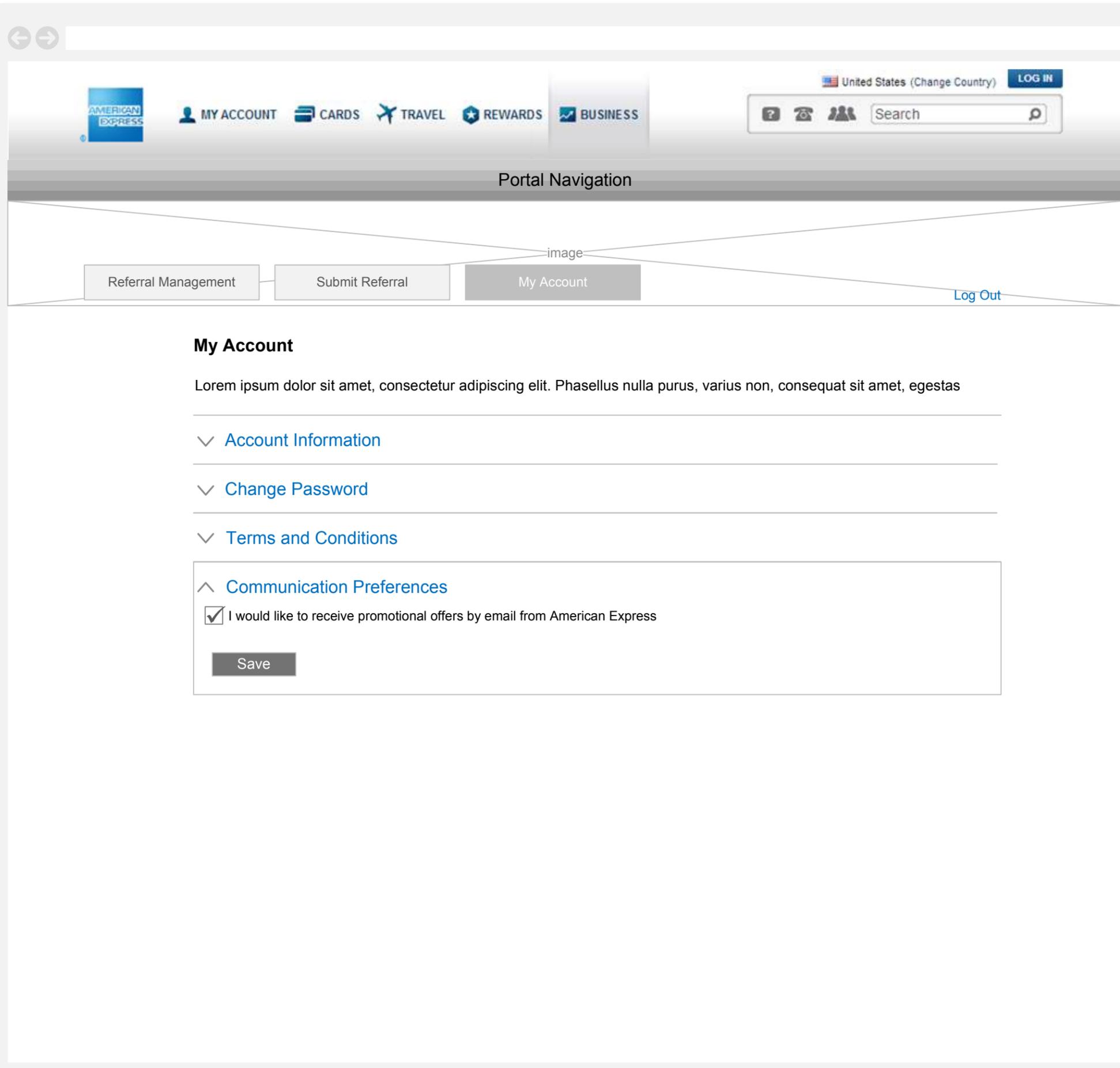
Persona: Partner Site Map Page: 1.3

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



Annotations

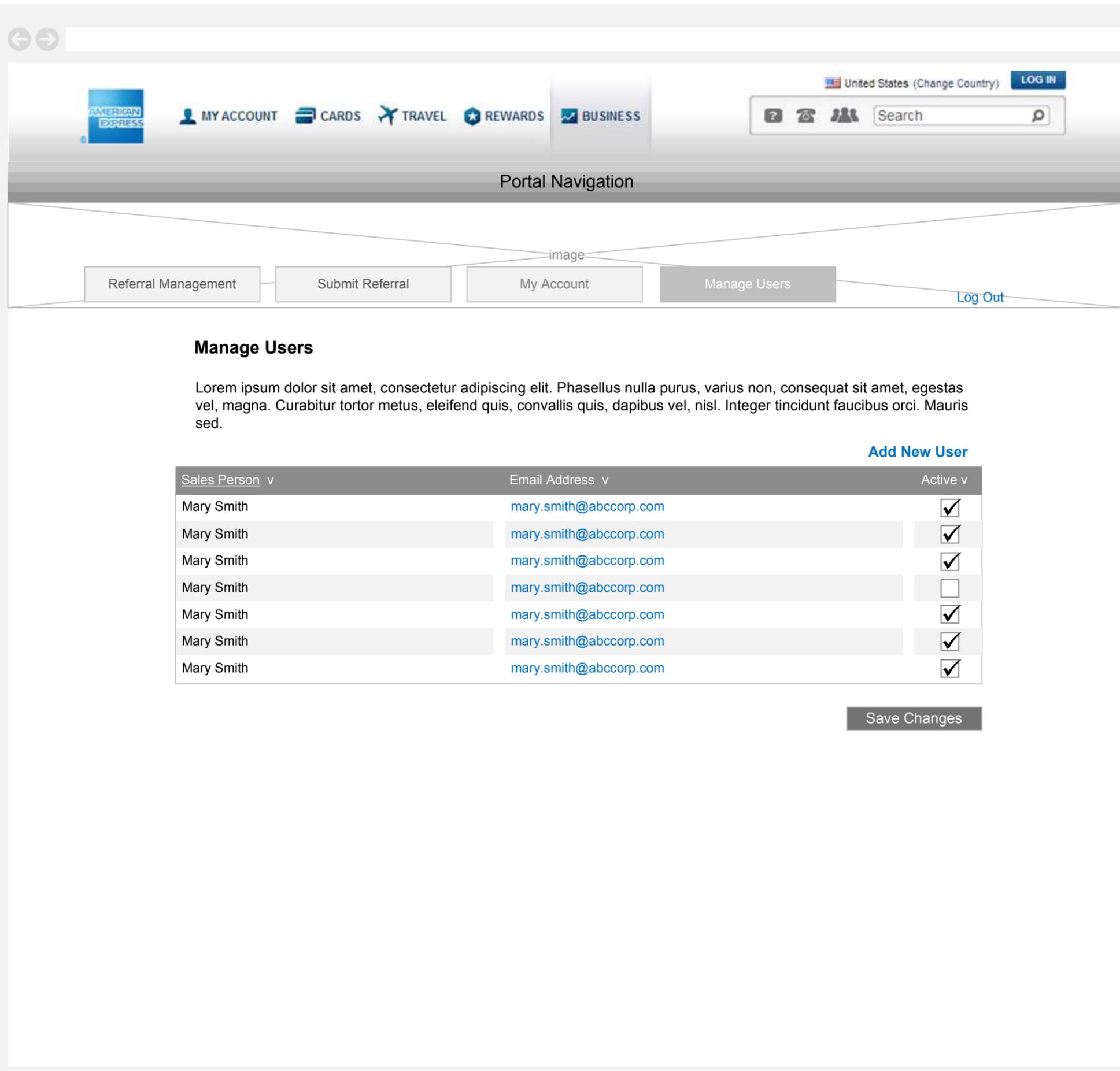
Persona: Partner
Site Map Page: 1.3



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..



Annotations

Persona: Partner AO
Site Map Page: 3.4.1

← →

AMERICAN EXPRESS

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

United States (Change Country) LOG IN

Search

Portal Navigation

image

Referral Management Submit Referral My Account Manage Users Log Out

Add New User

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All fields are required unless otherwise indicated

Sales Person Email Address

A temporary password will be automatically generated and emailed to the new user.

First Name

Last Name

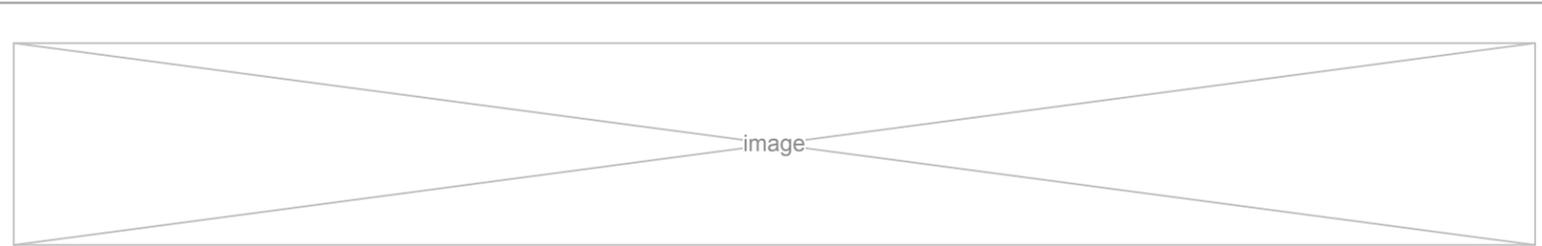
Phone Number

Add New User

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

Annotations

Persona: Local Partner Manager

Site Map Page: 4.0

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*)

United States (Change Country) LOG IN

AMERICAN EXPRESS MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

Search

Portal Navigation

Referral Management Partner Management My Account Log Out

Referral Management

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[Submit Referral](#)

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

[^ Rejected Referrals to Review](#) 9
[v Referrals Under Review](#) 162
[v All Referrals](#) 2,876

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

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

Referral Management
Partner Management
My Account

Log Out

1 **Submit a New Lead Referral**

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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 Registration Number (if applicable)

Contact First 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)

Existing Competitor Products (optional)

Additional information

Submit

2

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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⏶ **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

Close

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	Contact First Name	Contact Last Name
<input type="text" value="ABC Corp"/>	<input type="text" value="John"/>	<input type="text" value="Doe"/>
Company Division	Contact's Title	
<input type="text"/>	<input type="text" value="CTO"/>	
Company Street Address 1	Contact's Position ?	
<input type="text" value="123 Main St."/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="CTO"/>	
Company Street Address 2	Contact's Telephone Number	
<input type="text"/>	<input type="text" value="123-456-7890"/>	
Company Street Address 3	Contact's Email Address	
<input type="text"/>	<input type="text" value="John.doe@abccorp.com"/>	
Company City	Annual Company Revenue ?	
<input type="text" value="Amsterdam"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="€2.000.000 - €5.000.000"/>	
Company Postal Code	Company Country	Annual Travel Spend ?
<input type="text" value="123456"/>	<input type="text" value="Netherlands"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="€500.000 - €1.000.000"/>
Company Registration Number ?	Product of Interest ?	
<input type="text"/>	<input style="border-bottom: 1px solid #ccc;" type="text" value="Corporate Card"/>	
Additional information	Exisiting Competitor Products	
<input style="height: 40px;" type="text"/>	<input type="text"/>	

[Close](#)

⏷ **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?

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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	Contact First Name	Contact Last Name
ABC Corp	John	Doe
Company Division	Contact's Title	
	CTO	
Company Street Address 1	Contact's Position	
123 Main St.	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	Annual Company Revenue	
Amsterdam	\$2,000,000 - \$5,000,000	
Company Postal Code	Company Country	Annual Travel Spend
123456	Netherlands	\$100,000 - \$1,000,000
Company Registration Number	Product of Interest	
	Corporate Card	
Additional information	Existing 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.		

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

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+



MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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
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

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

▼ 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?

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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☎
👤

1	Partner Requests	5	
	All Partners	123	
	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

<p>Authorizing Officer Email Address jane.smith@xyzllc.com</p> <p>Authorizing Officer First Name Jane</p> <p>Authorizing Officer Last Name Smith</p> <p>Authorizing Officer Phone Number 1234-456-7890</p> <p>Notes Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus nulla purus, varius non, consequat sit amet, egestas vel, magna.</p> <p>Source <input style="width: 100%;" type="text"/></p> <p>Sub-Source <input style="width: 100%;" type="text"/></p> <p>Inter Amex Identifier? <input type="radio"/> Yes <input type="radio"/> No </p> <p style="text-align: center;">Approve</p>	<p>Company Name XYZ LLC.</p> <p>Type of Partnership Travel</p> <p>Street 1 123 Main St Suite 100</p> <p>City Amsterdam</p> <p>Postal Code 123456</p> <p>Country Netherlands</p> <p>Partnership Type <input style="width: 100%;" type="text"/></p> <p>Partnership Manager <input style="width: 100%;" type="text"/></p> <p>Program Description <input style="width: 100%;" type="text"/></p>
---	---

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.

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.

The wireframe shows a web page for adding a new partner. At the top is a navigation bar with the American Express logo, links for MY ACCOUNT, CARDS, TRAVEL, REWARDS, and BUSINESS, a search bar, and a LOG IN button. Below this is a 'Portal Navigation' section with buttons for Referral Management, Partner Management (highlighted), and My Account, along with a Log Out link. The main content area is titled 'Add a New Partner' and contains a paragraph of placeholder text. Below the text is a note that all fields are required unless otherwise indicated. The form is divided into two columns of input fields: Authorizing Officer Email Address, First Name, Last Name, and Phone Number on the left; and Company Name, Type of Partnership, Street Address 1, 2, and 3, City, Postal Code, and Country on the right. A 'Type of Partnership' dropdown menu is also present. An 'Add New Partner' button is located at the bottom left of the form area.

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

Company Name

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

Type of Partnership

First Name

Street Address 1

Last Name

Street Address 2

Phone Number

Street Address 3

City

Postal Code

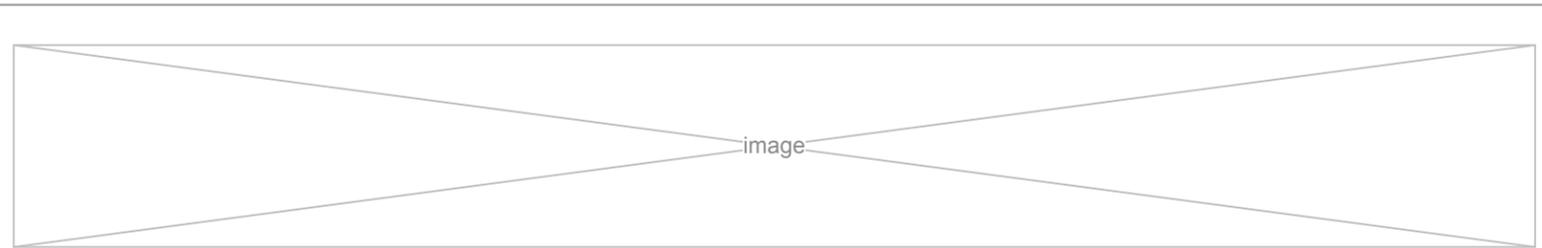
Country

Add New Partner

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

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.

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

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
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 users for each partners by clicking one off the Partner company names. They can then assign the AO role to a different user.

1. Additional Partner information has been added to this detail view of an approved partner, including the partner address and the new fields added to the Partner Requests page.

MY ACCOUNT
CARDS
TRAVEL
REWARDS
BUSINESS

United States (Change Country)
LOG IN

Referral Management
Partner Management
My Account

Log Out

Partner Management

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.

[Add New Partner](#)

v
Partner Requests
5

[See All Partners](#)

v
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 [Close](#)

123 Main St Suite 100 1

Netherlands

123456

Source

Sub-Source

Inter Amex Identifier?
 Yes No

Partnership Type

Partnership Manager 3

Program Description

Sales Person v	Email v	Phone v	Authorizing Officer v
John Doe	john.doe@xyzllc.com	123-456-7890	<input checked="" type="radio"/>
John Doe	john.doe@xyzllc.com	123-456-7890	<input type="radio"/>
John Doe	john.doe@xyzllc.com	123-456-7890	<input type="radio"/>
John Doe	john.doe@xyzllc.com	123-456-7890	<input type="radio"/>

Save Changes

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

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.

← →

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

My Account

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

Account Information

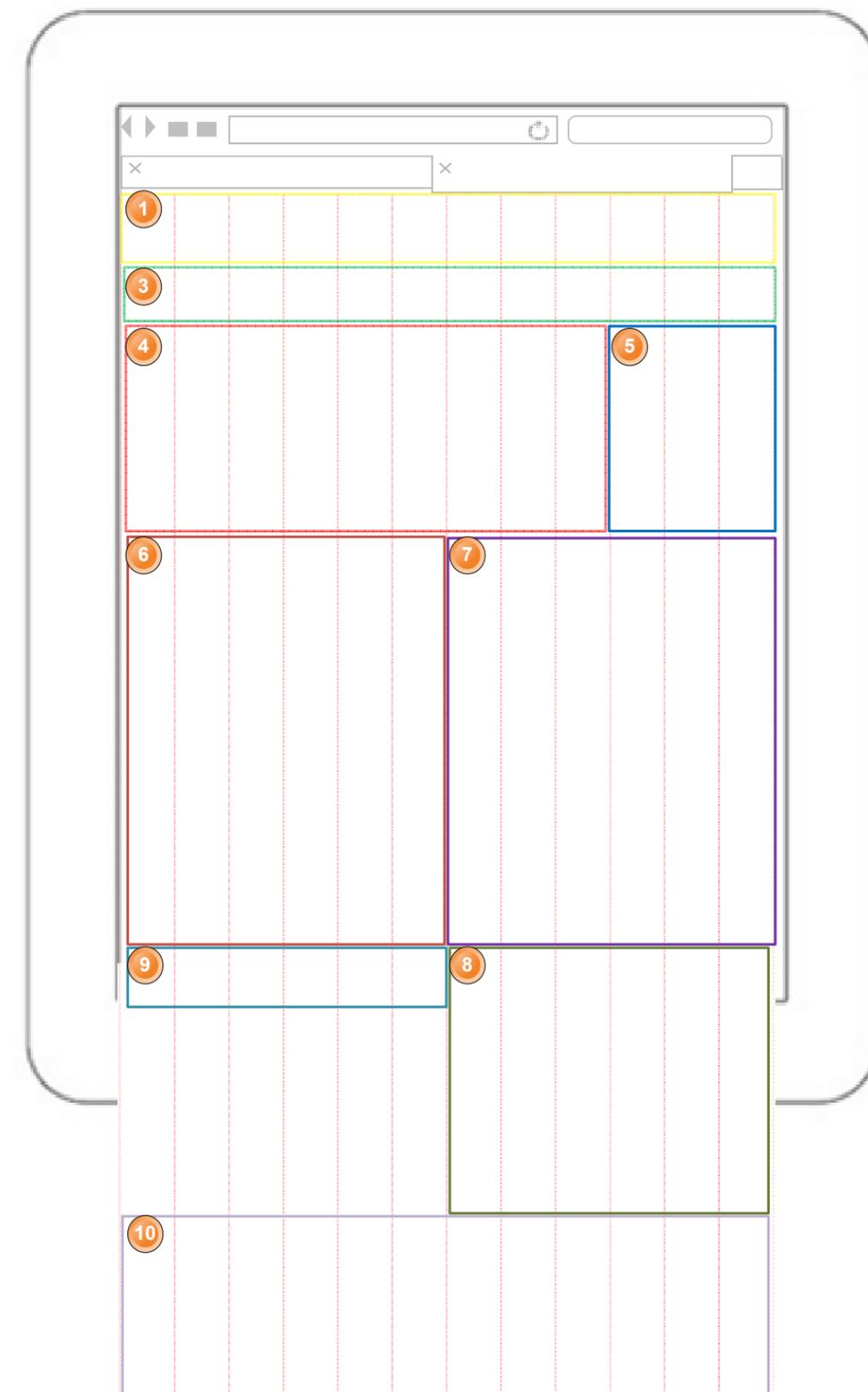
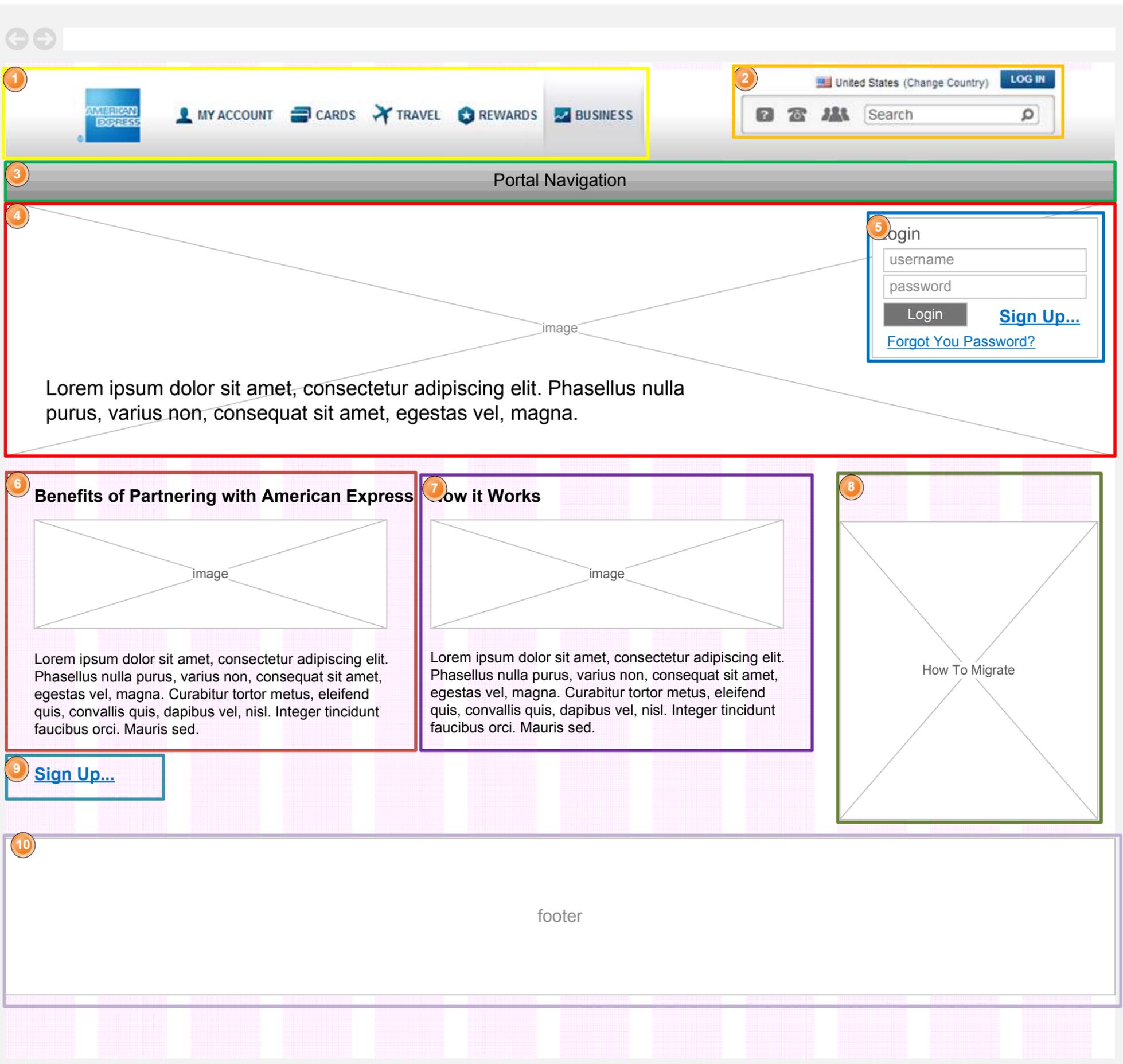
Email Address (login username)	Street Address 1
John.doe@abccorp.com	123 Main St.
First Name	Street Address 2 (if applicable)
John	
Last Name	Street Address 3 (if applicable)
Doe	
Phone Number	City
123-456-7890	Amsterdam
	Postal Code
	123456
	Country
	Netherlands

Save

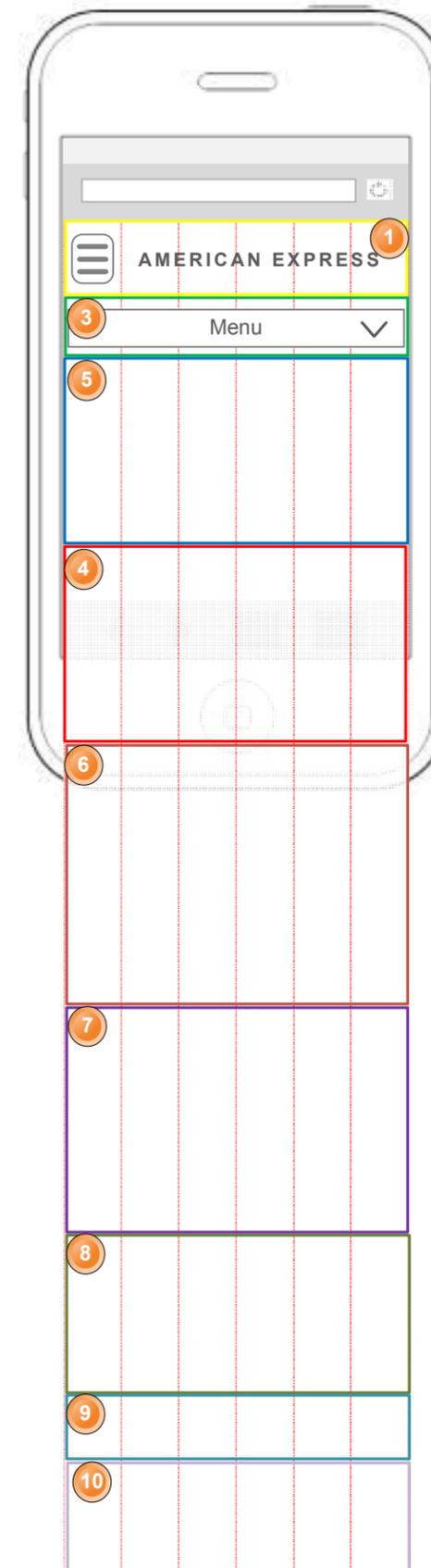
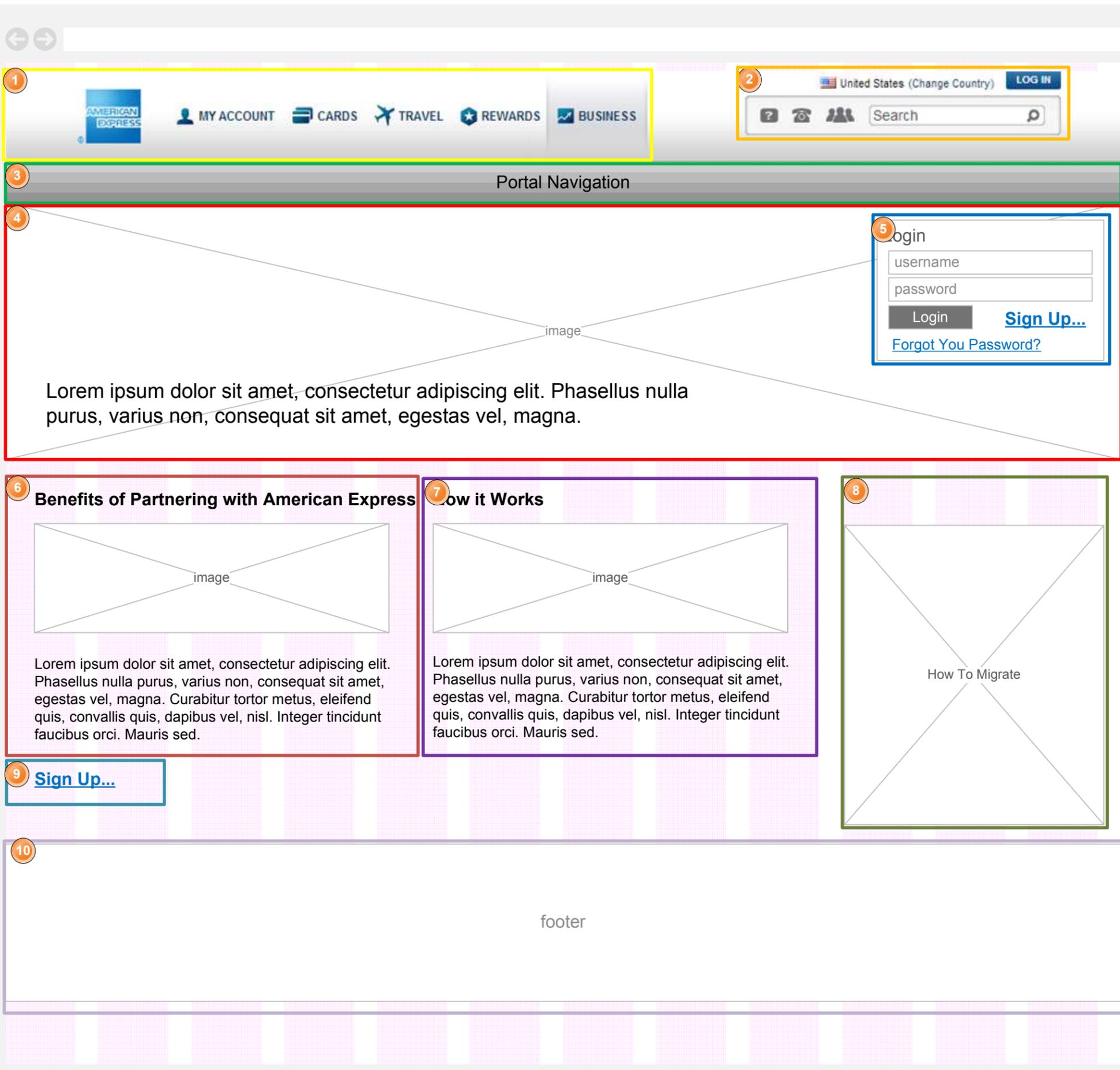
Section 6:

Wireframes – Responsive Layout

Annotations

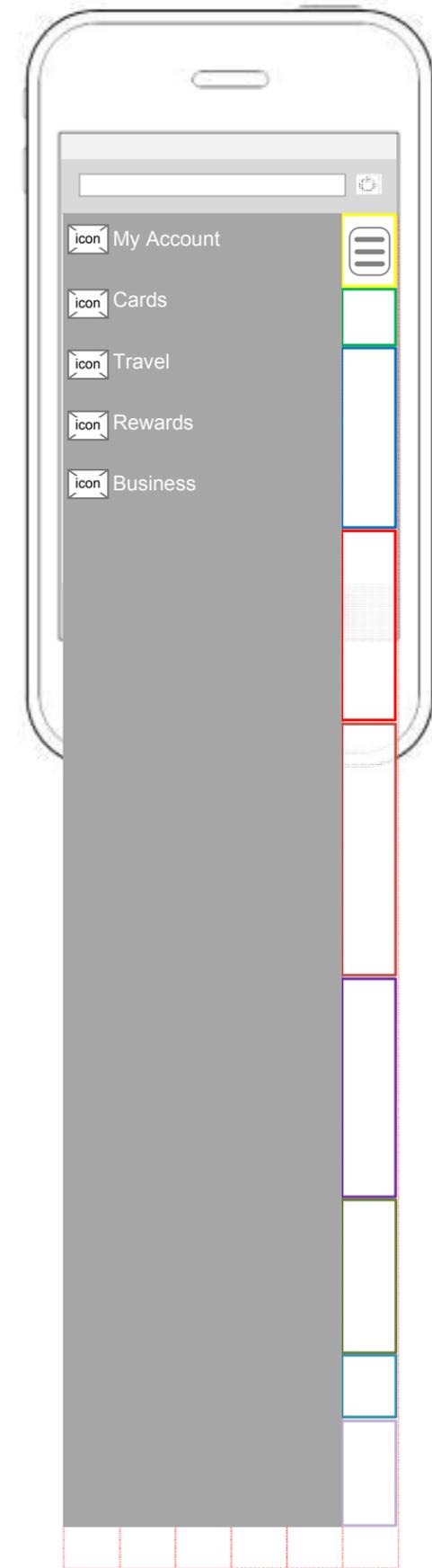
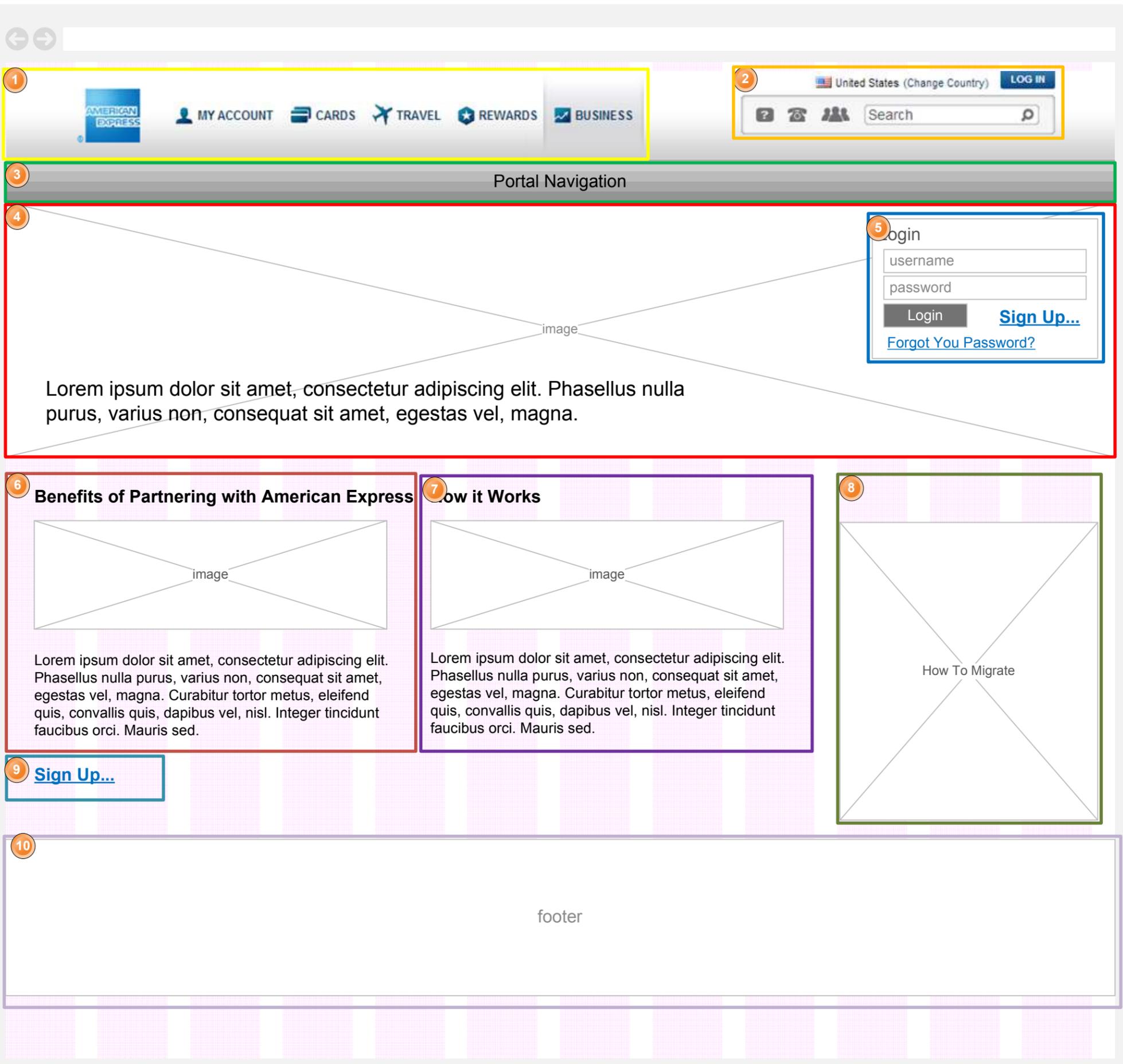


Annotations



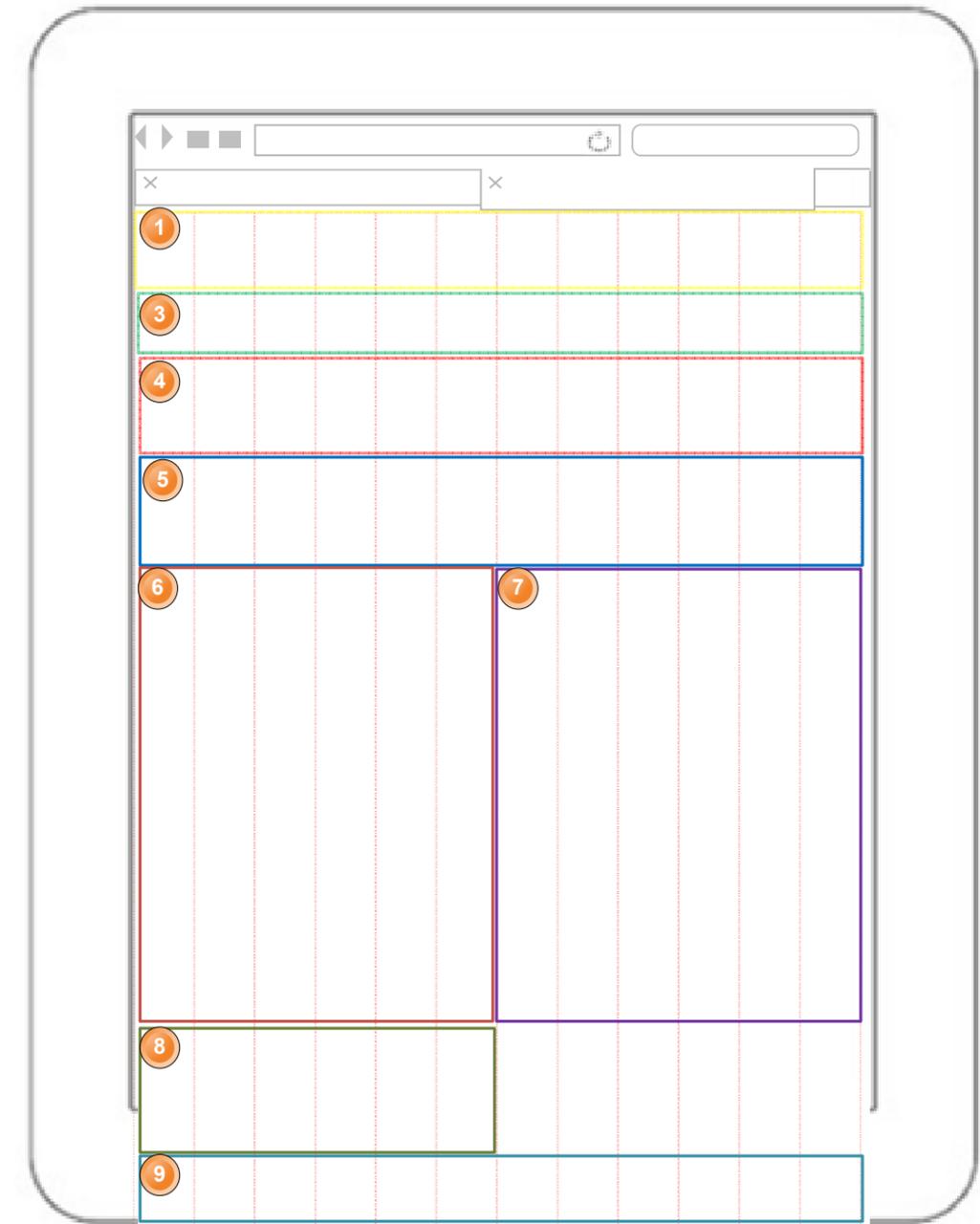
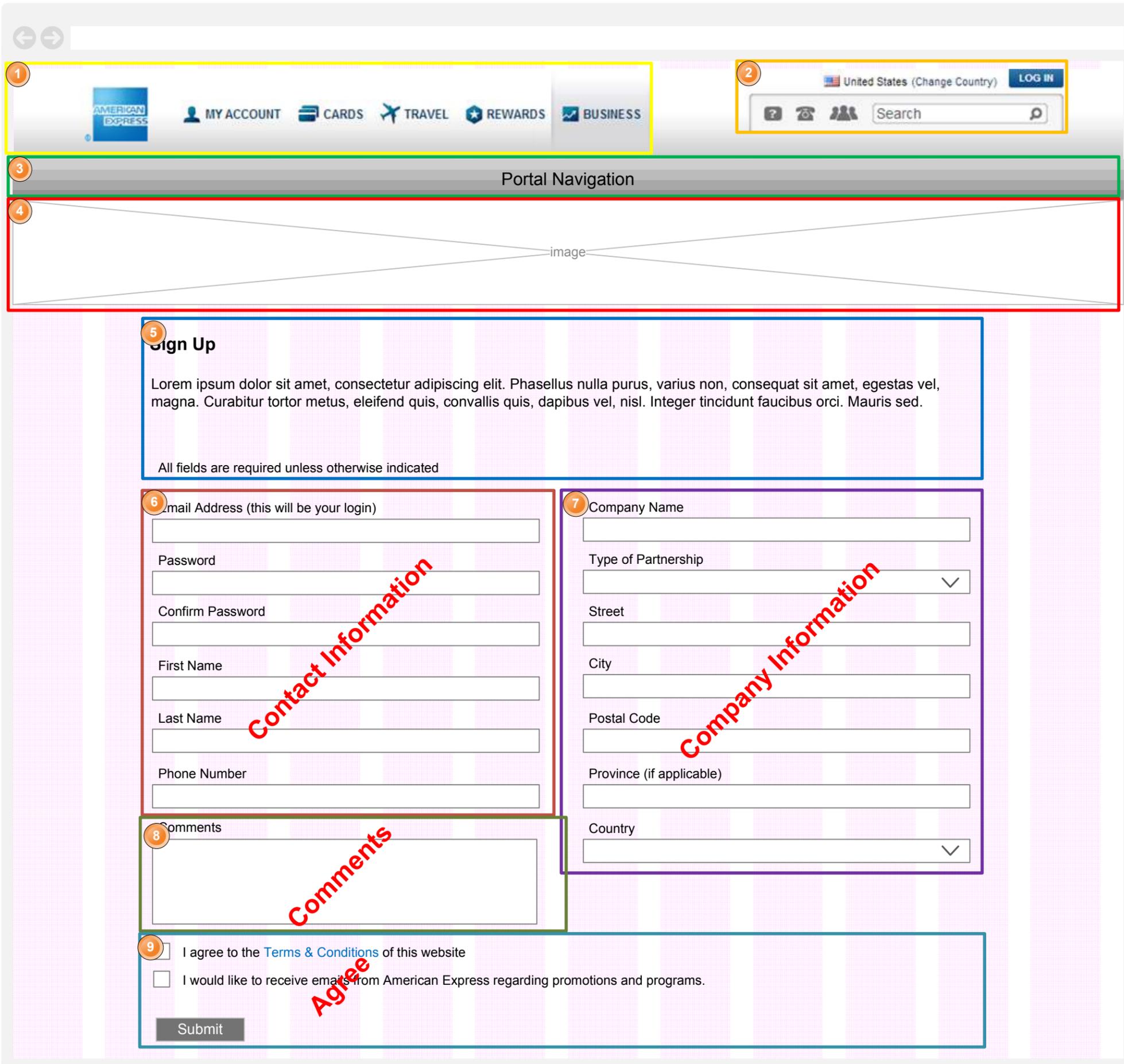
- 1. The general site navigation at the top of the page collapses into a familiar menu button, and the logo is replaced with "American Express".
- 3. The Portal marketing navigation is collapsed into a select list.

Annotations

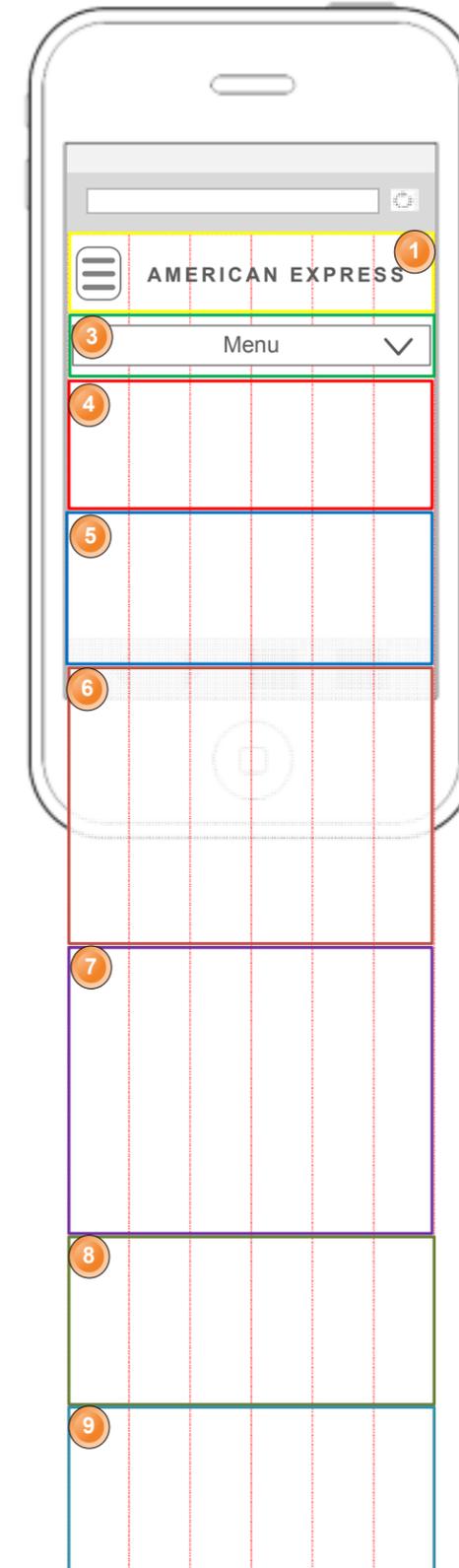


When the user taps the Menu button, the primary menu expands from the side to expose the main menu items.

Annotations



Annotations




MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

United States (Change Country) LOG IN

Portal Navigation

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 Contact Information

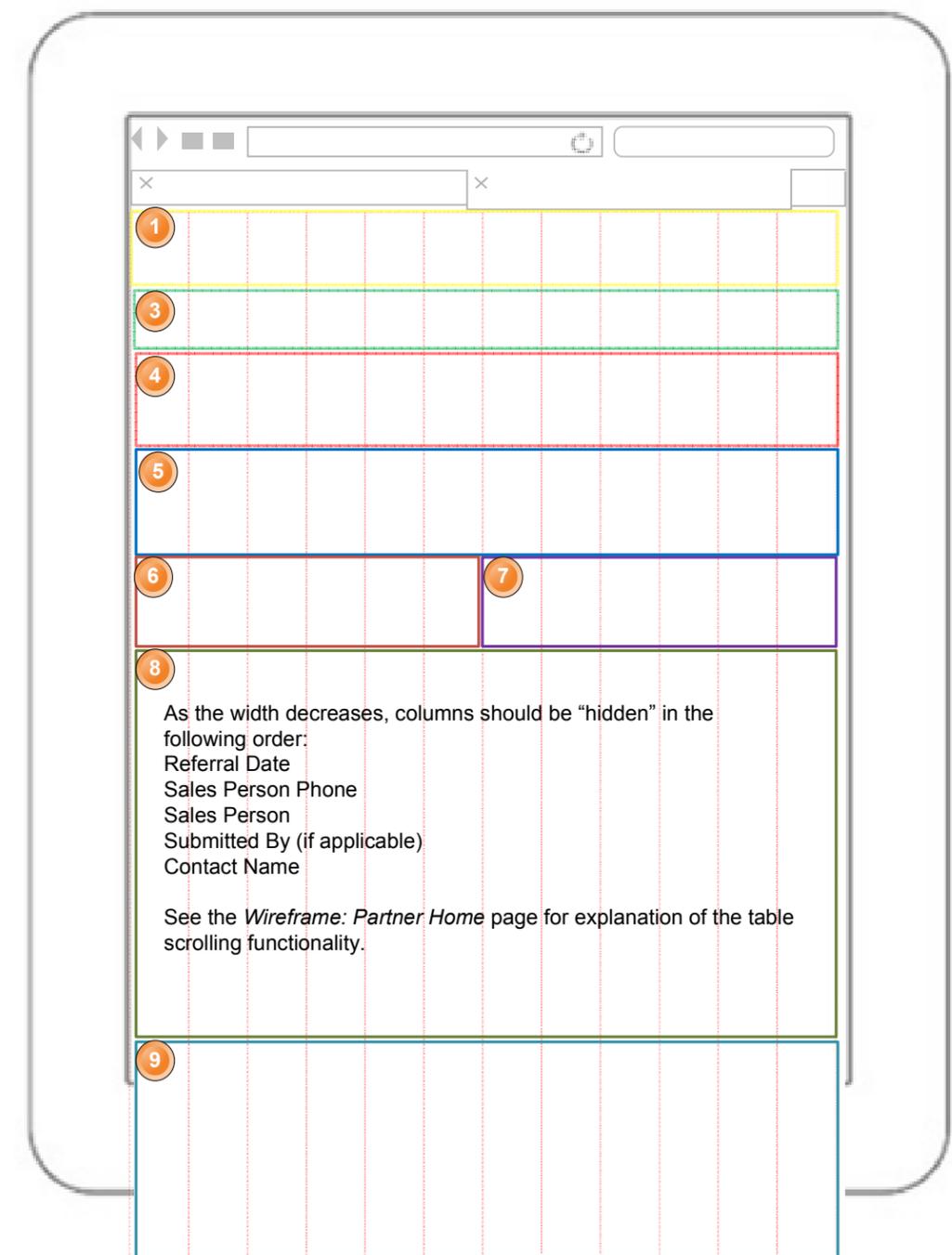
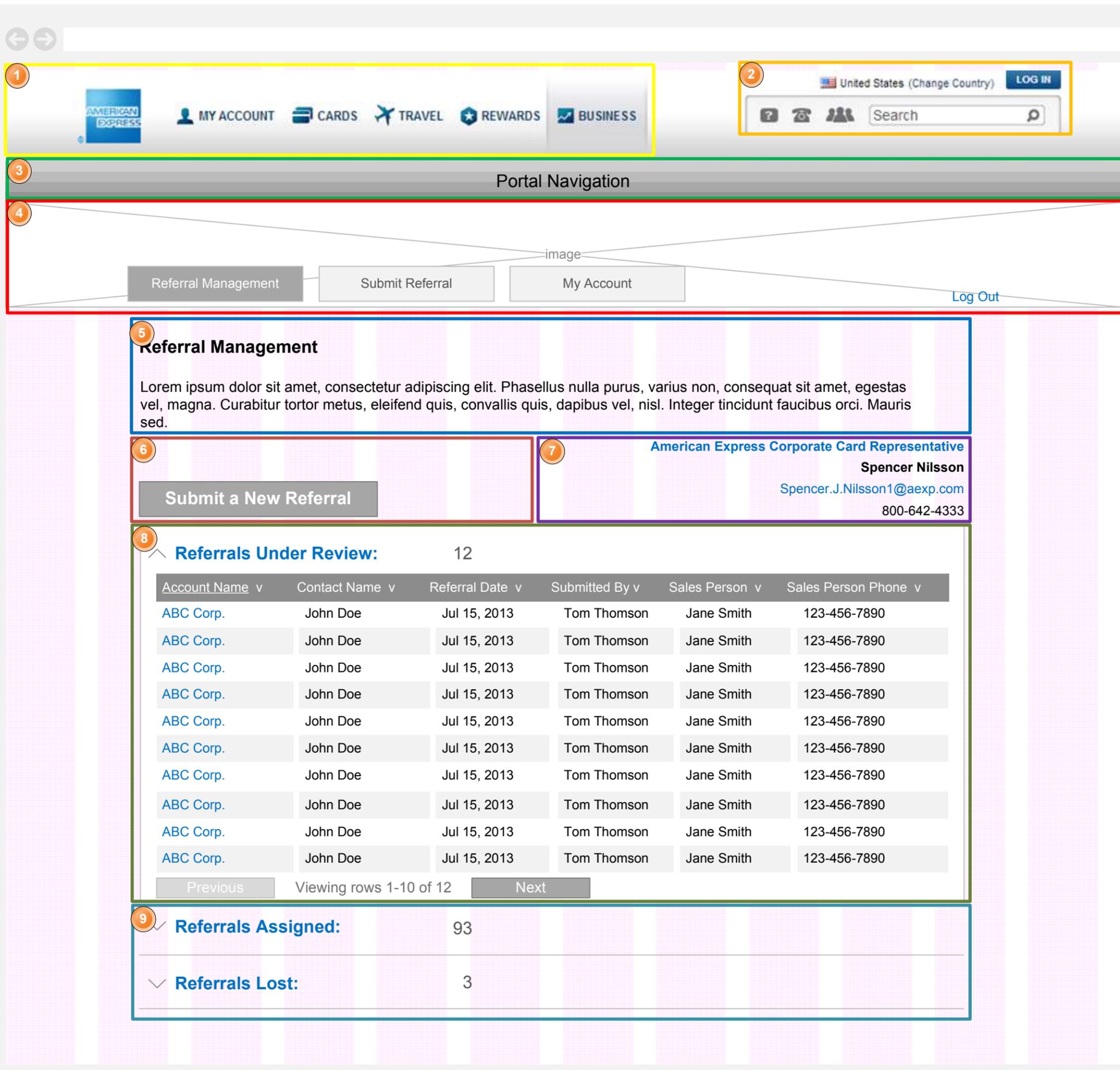
7 Company Information

8 Comments

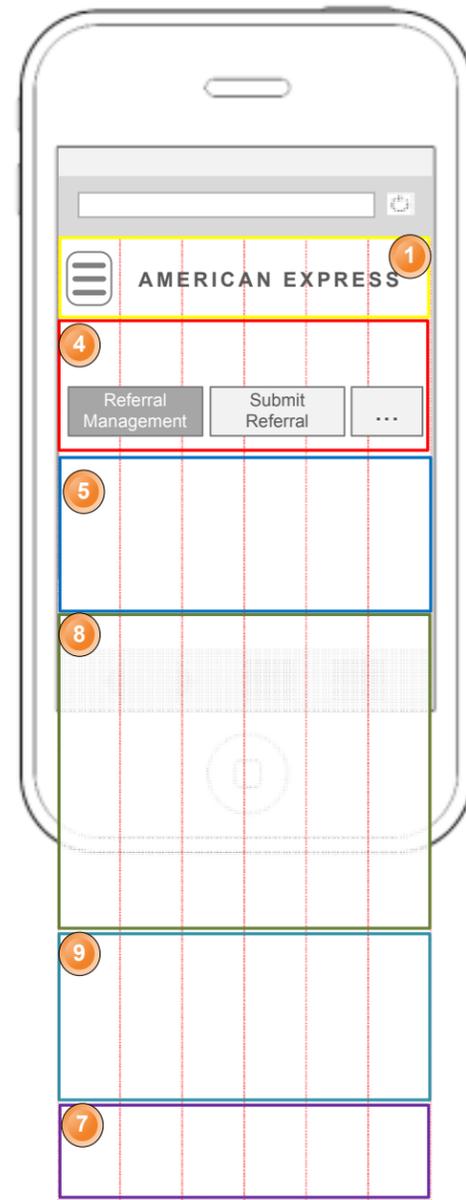
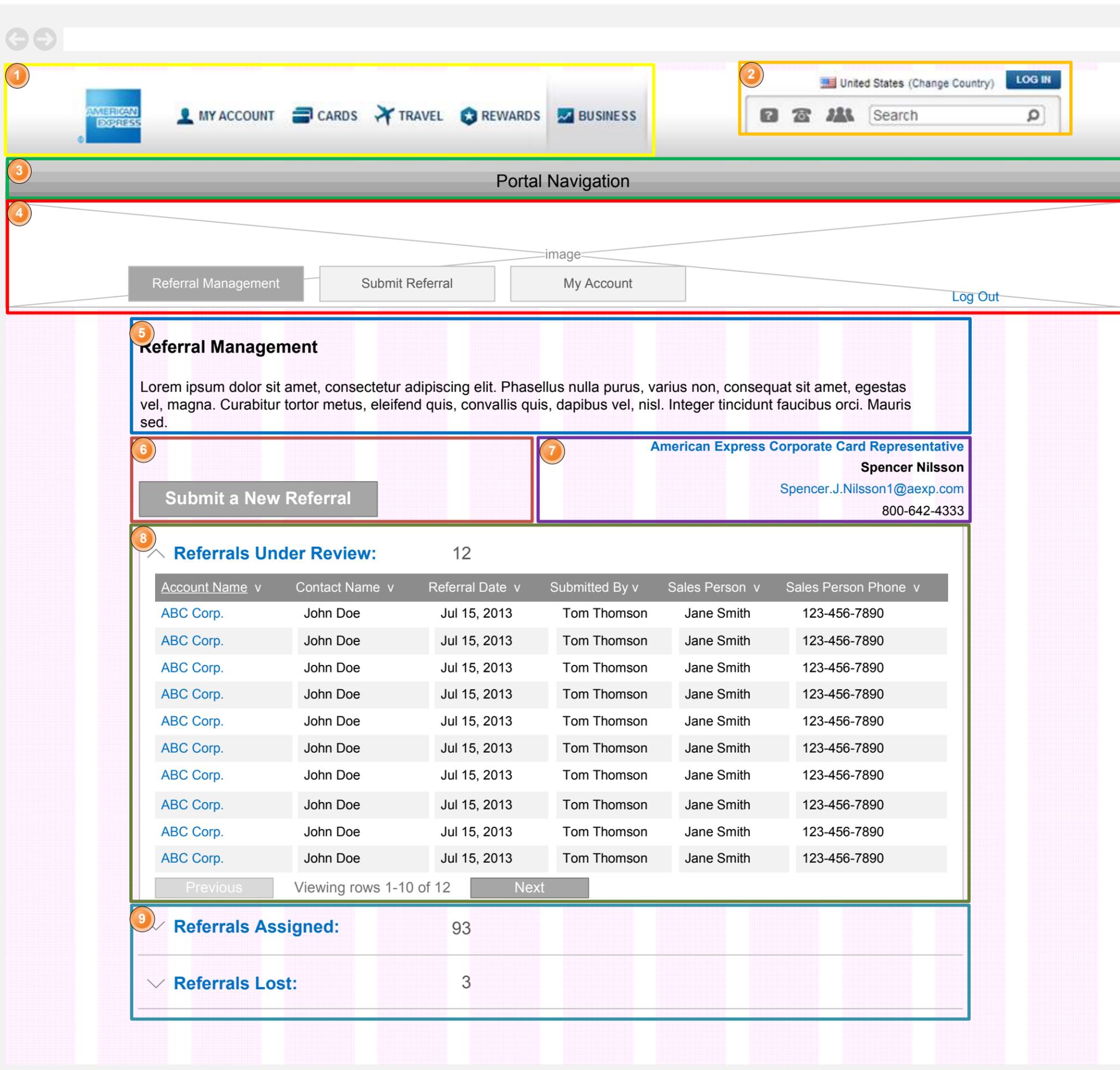
I agree to the [Terms & Conditions](#) of this website

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

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:

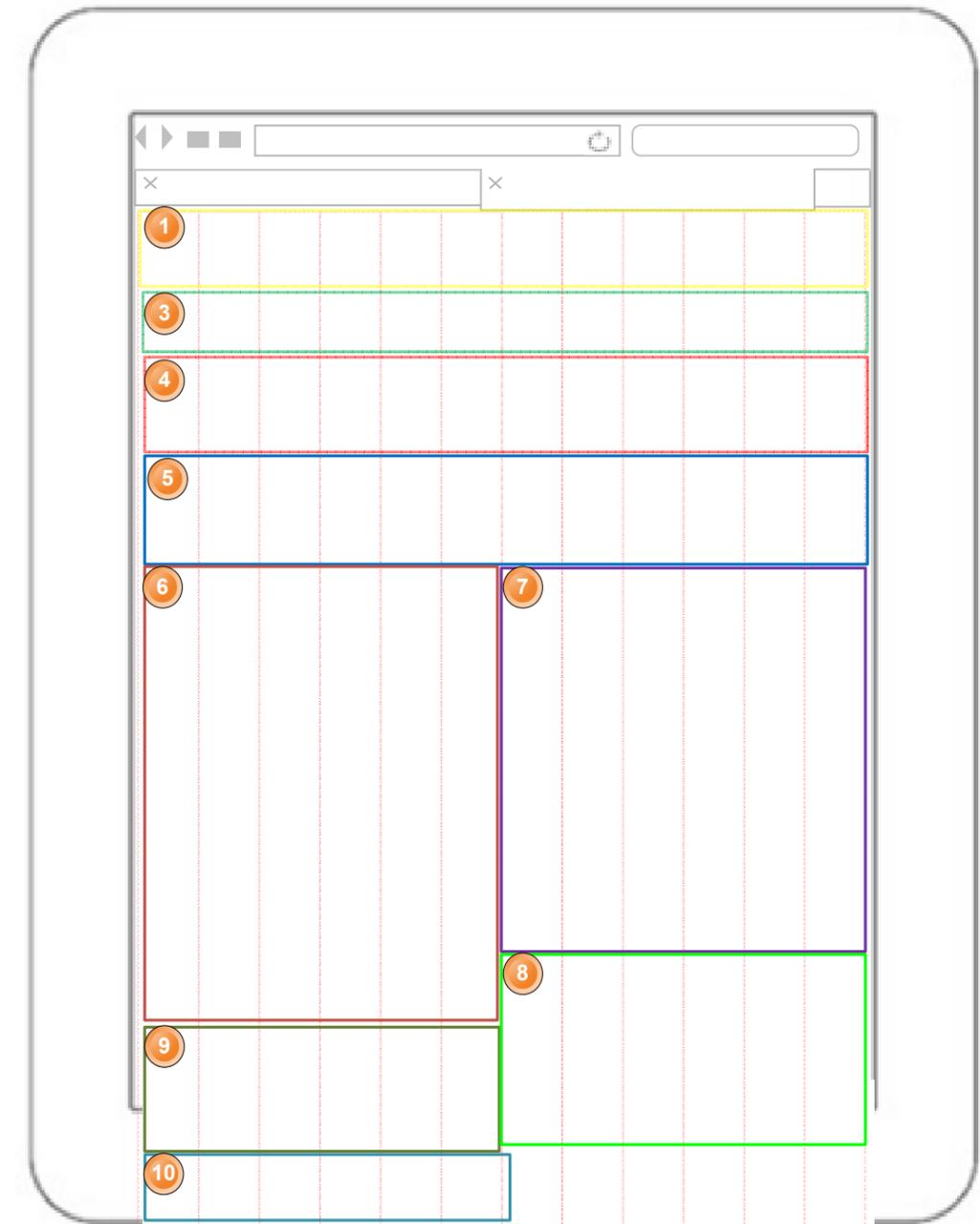
- Referral Date
- Sales Person Phone
- Sales Person
- Submitted By (if applicable)
- Contact Name.

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.

Annotations



1

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)

Contact Information

7

First Name of Main Contact Last Name of Main Contact

Contact's Position

Contact's Telephone Number

Contact's Email Address

Company Information

8

Annual Travel Spend

Annual Company Revenue

BTA and/or Card opportunity

Travel Management Company Actions To Date

Additional Company Information

9

Additional information

Comments

10

Submit

Annotations

1. Header navigation area containing the American Express logo, 'MY ACCOUNT', 'CARDS', 'TRAVEL', 'REWARDS', and 'BUSINESS' links.

2. User profile area showing 'United States (Change Country)' and a 'LOG IN' button.

3. Portal Navigation bar.

4. Main navigation area with buttons for 'Referral Management', 'Submit Referral', 'My Account', and 'Log Out'.

5. Section header: 'Submit a New Lead Referral' followed by placeholder text.

6. Form section for contact information: 'All fields are required unless otherwise indicated'. Fields include Company Name, Company Street Address, Company City, Company Province (If applicable), Company Postal Code, Company Registration Number, and Product of Interest (optional).

7. Form section for main contact details: Fields include First Name of Main Contact, Last Name of Main Contact, Contact's Position, Contact's Telephone Number, and Contact's Email Address.

8. Form section for financial and travel data: Fields include Annual Travel Spend, Annual Company Revenue, BTA and/or Card Opportunity, and Travel Management Company Actions To Date.

9. Text area for 'Additional information' or 'Comments'.

10. 'Submit' button.

1. Mobile header with the American Express logo.

4. Mobile navigation bar with 'Referral Management', 'Submit Referral', and a menu icon.

5. Mobile section header: 'Submit a New Lead Referral'.

6. Mobile form section for contact information.

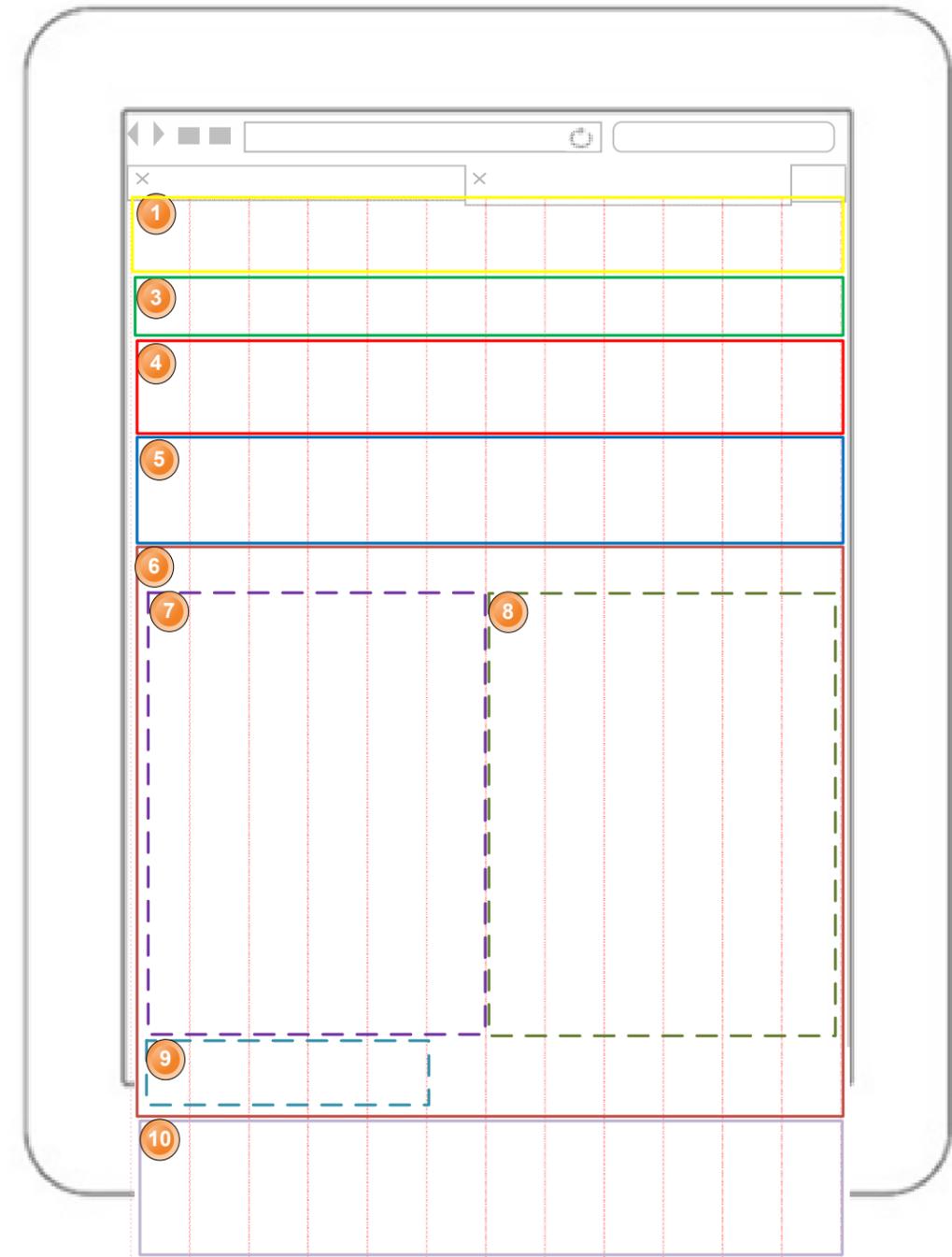
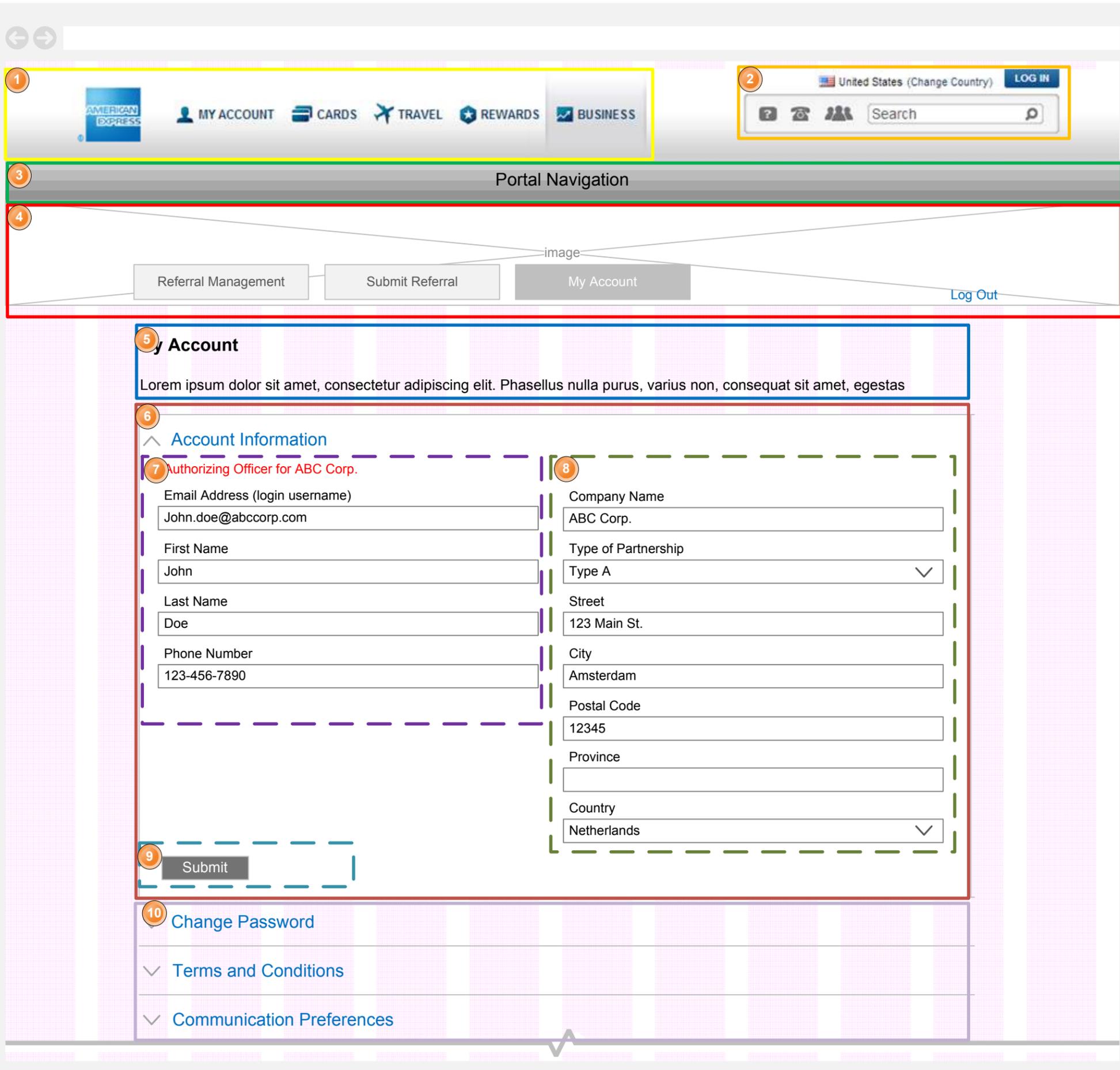
7. Mobile form section for main contact details.

8. Mobile form section for financial and travel data.

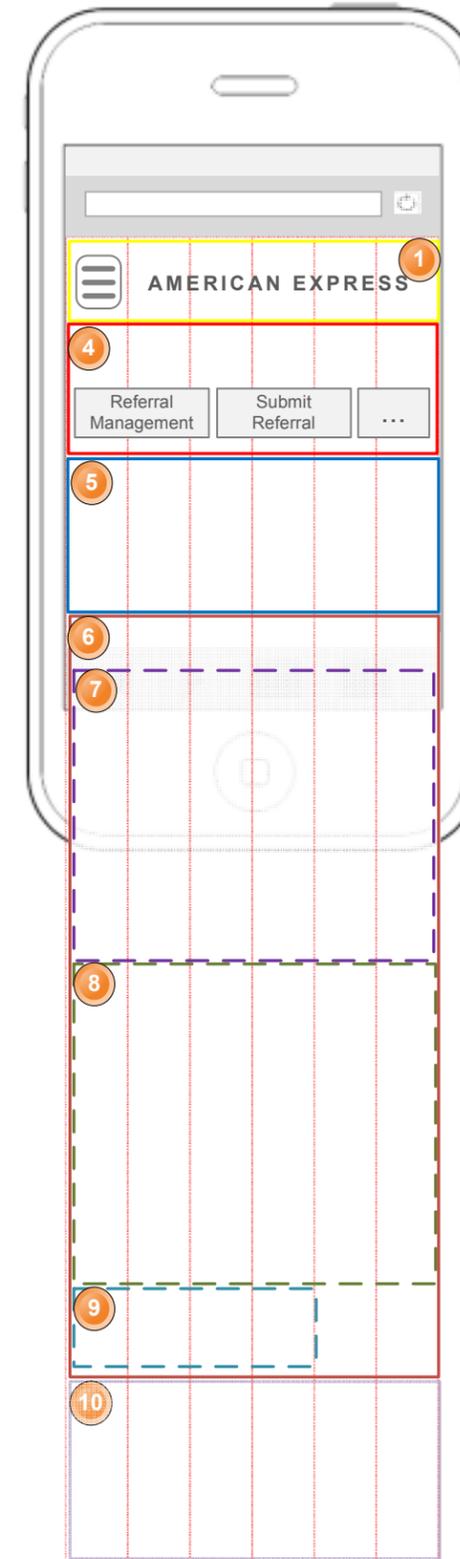
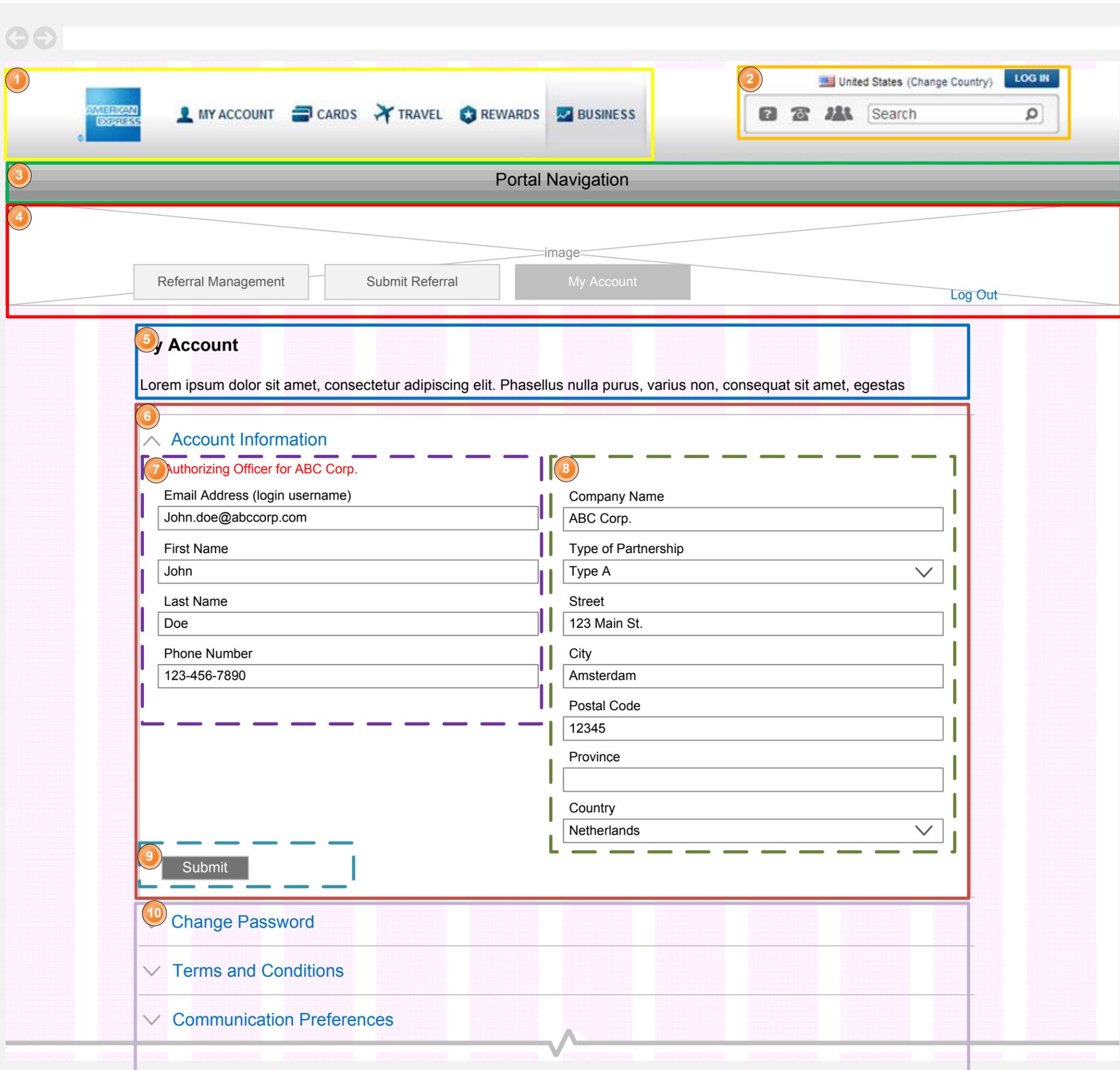
9. Mobile text area for 'Additional information' or 'Comments'.

10. Mobile 'Submit' button.

Annotations

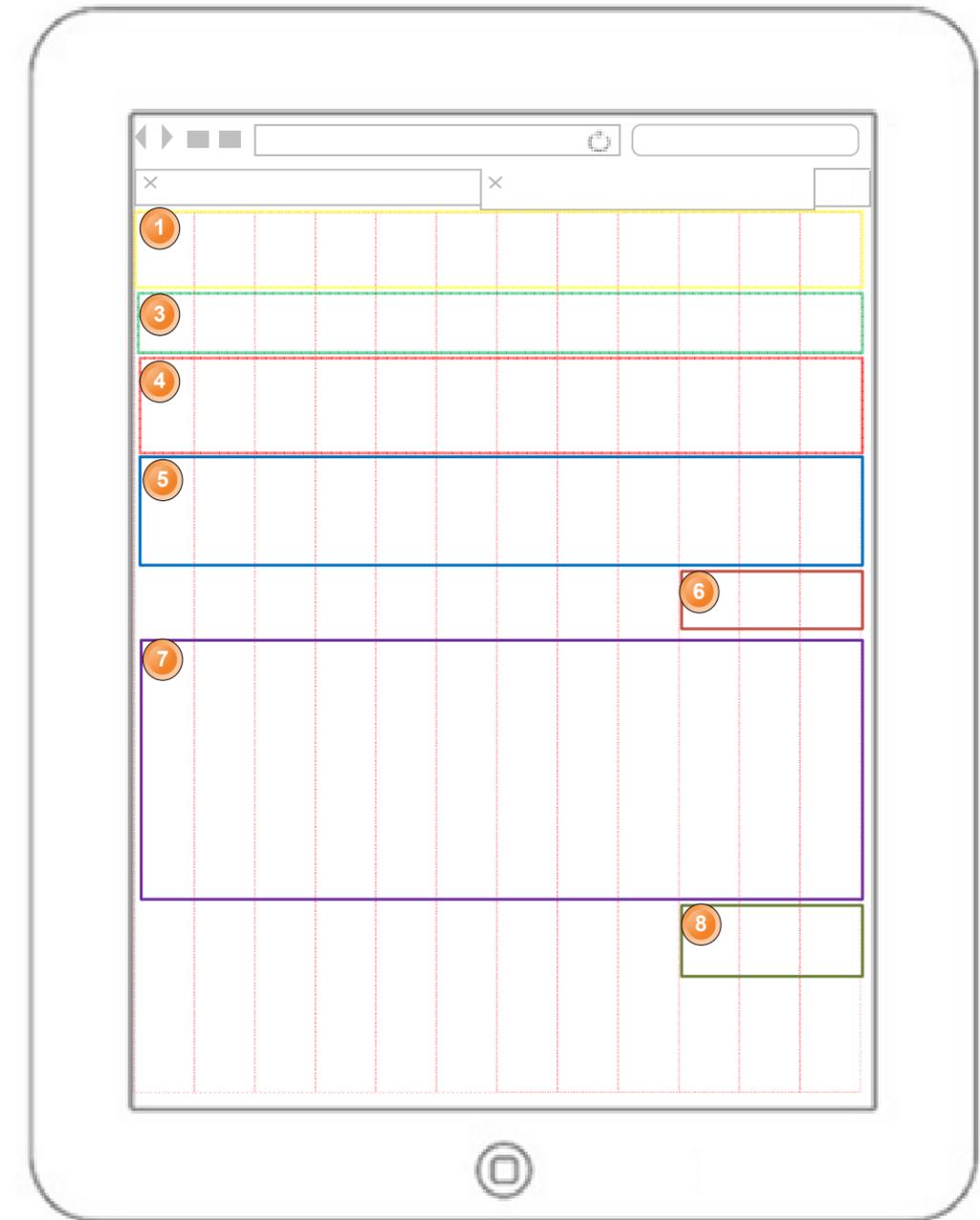


Annotations



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



1

2

3

Portal Navigation

4

5

Manage Users

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

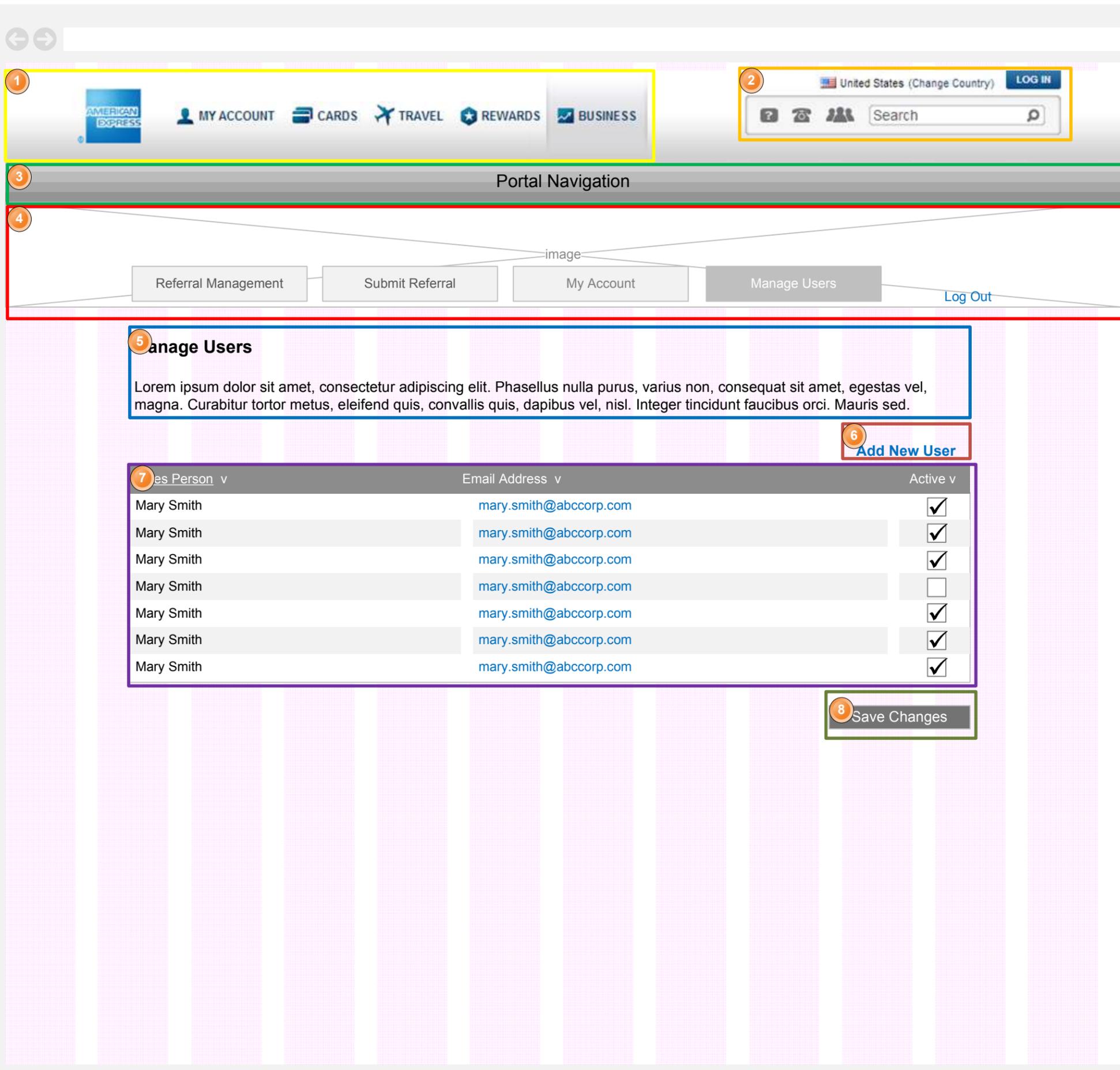
Add New User

7

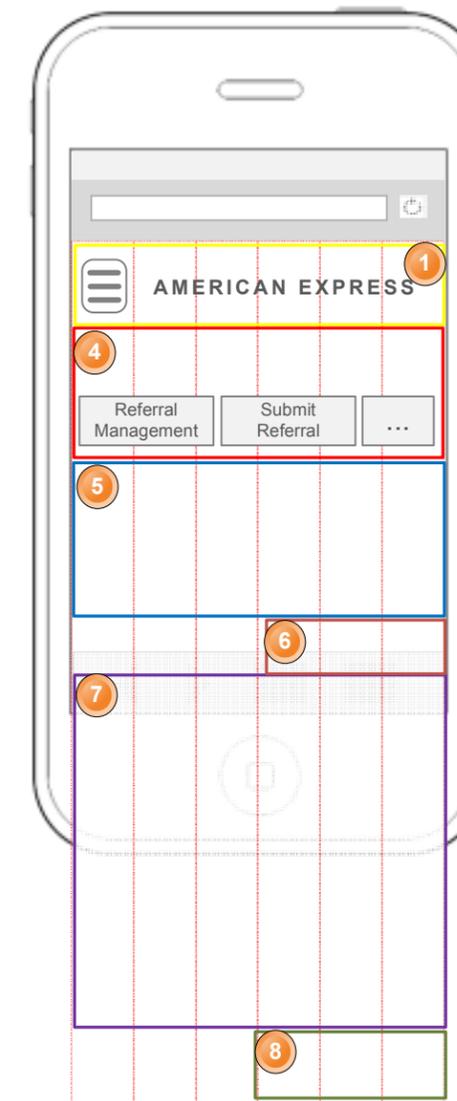
Person v	Email Address v	Active v
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>
Mary Smith	mary.smith@abccorp.com	<input checked="" type="checkbox"/>

8

Save Changes

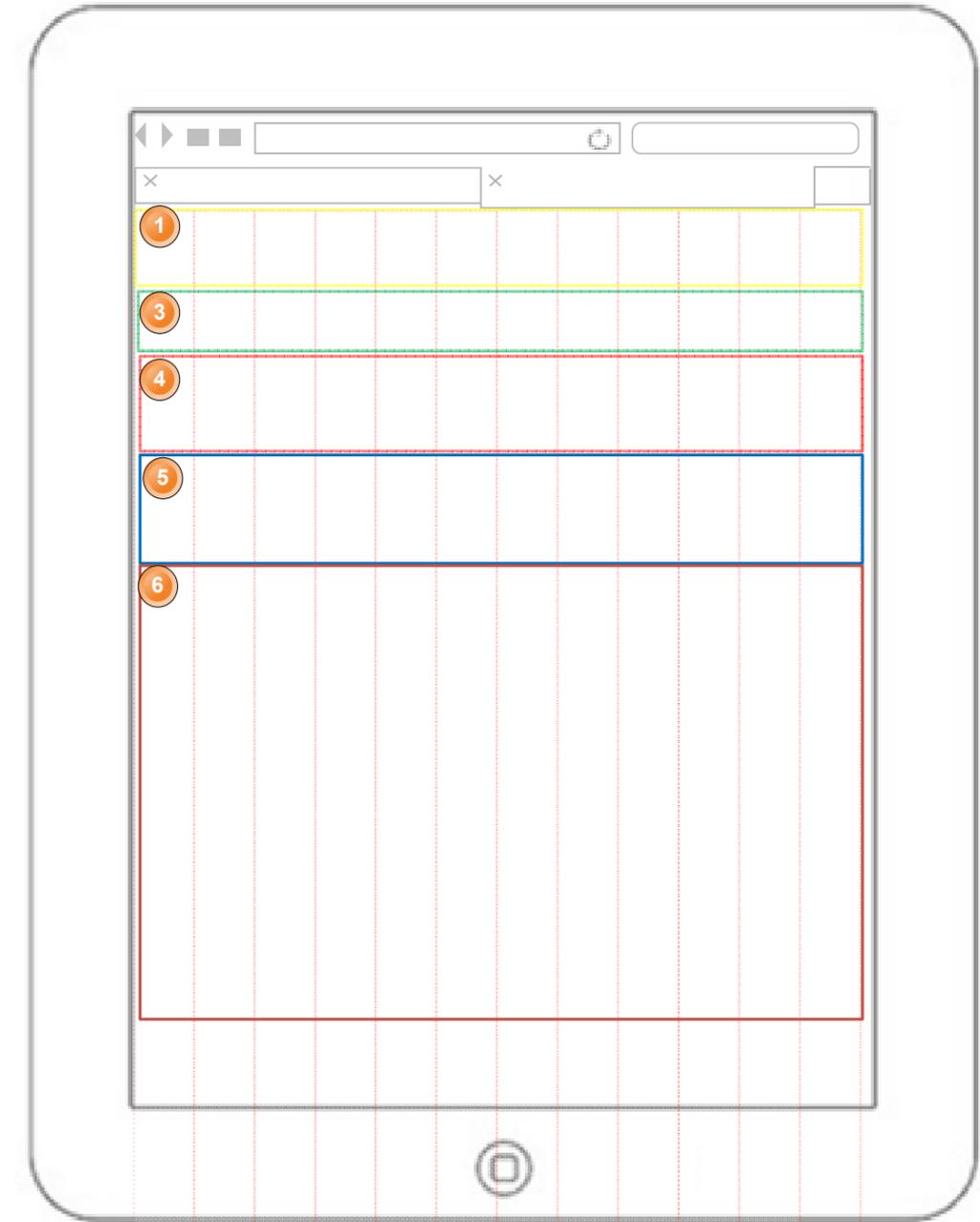
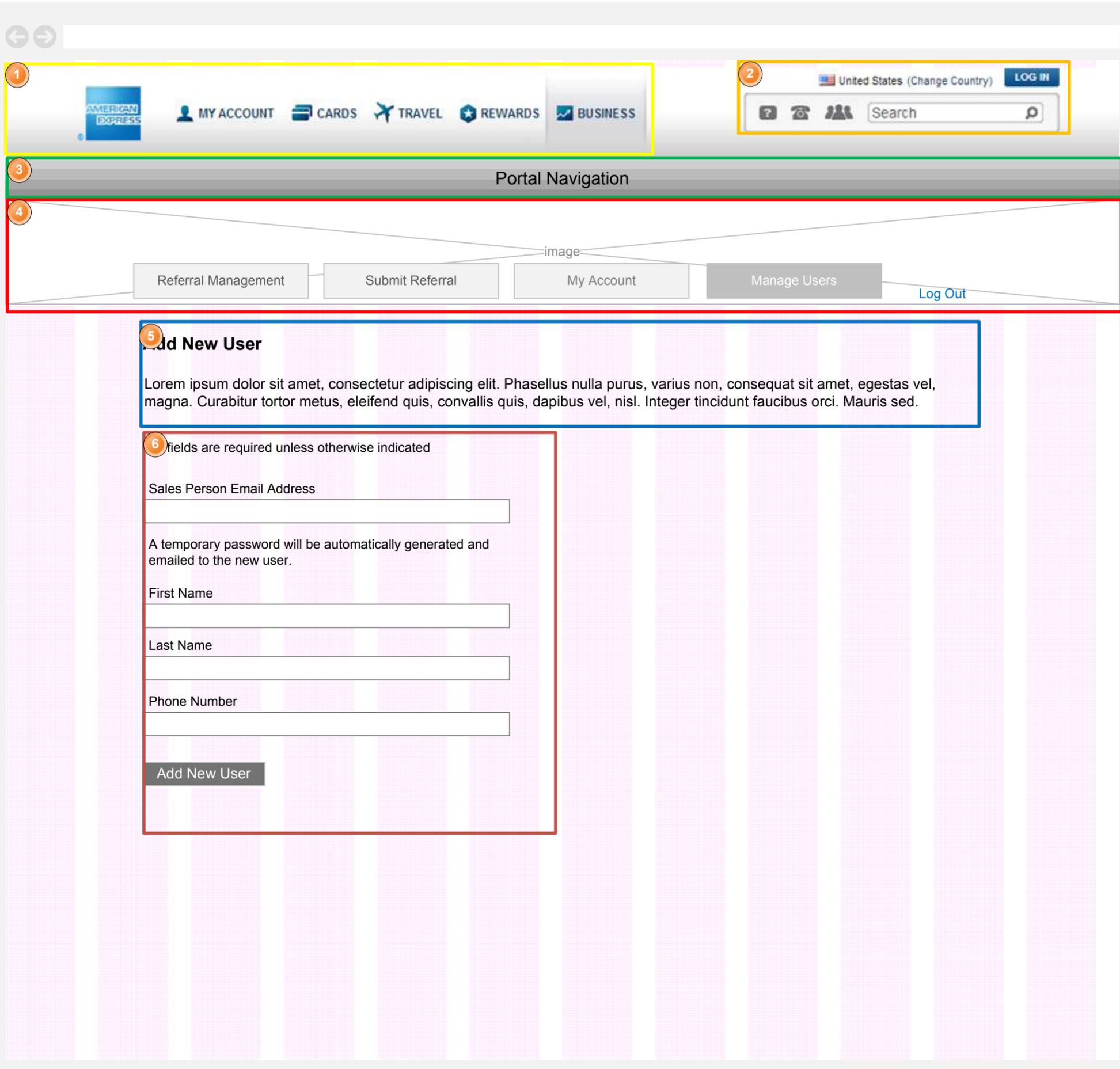


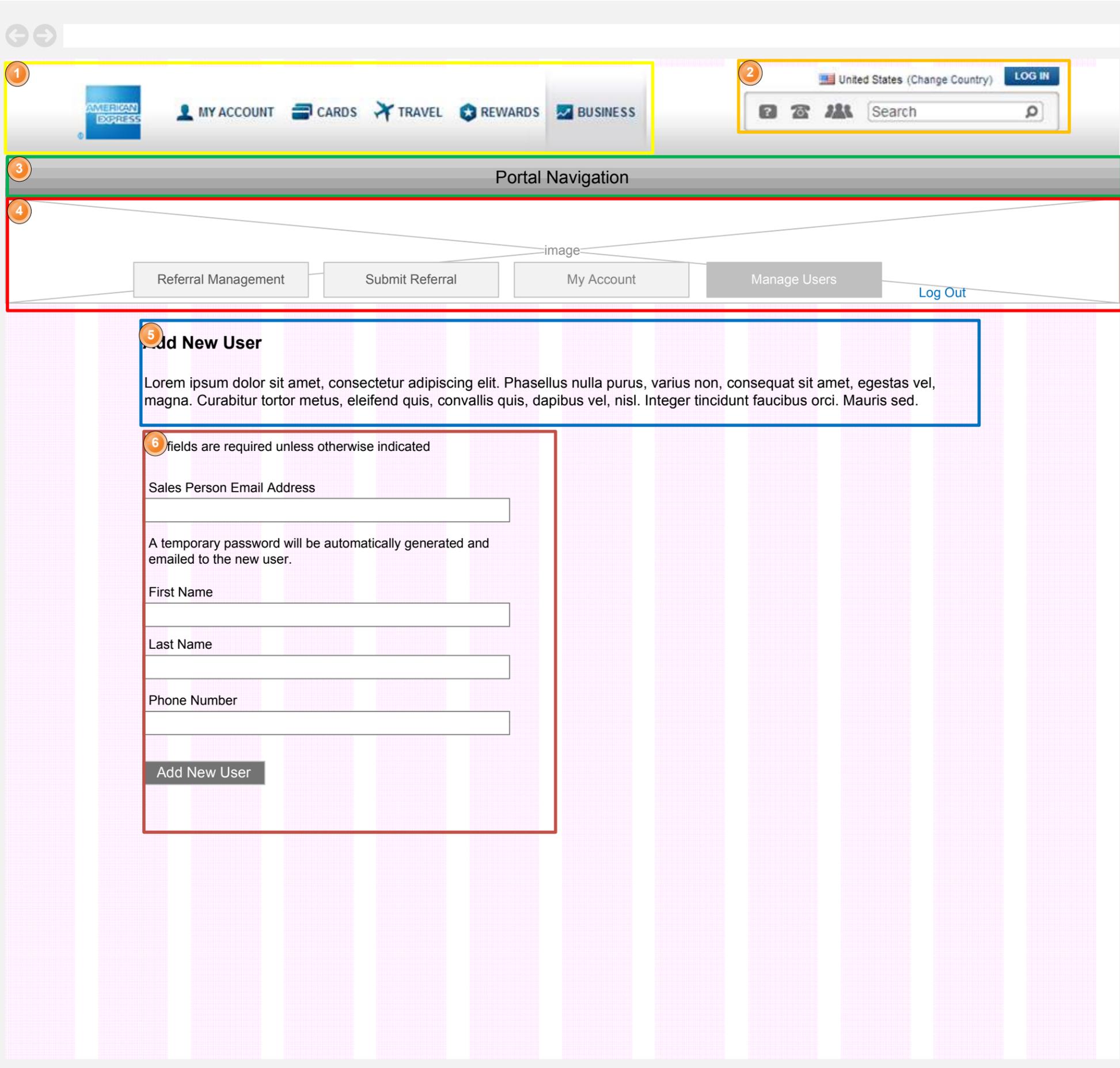
Annotations



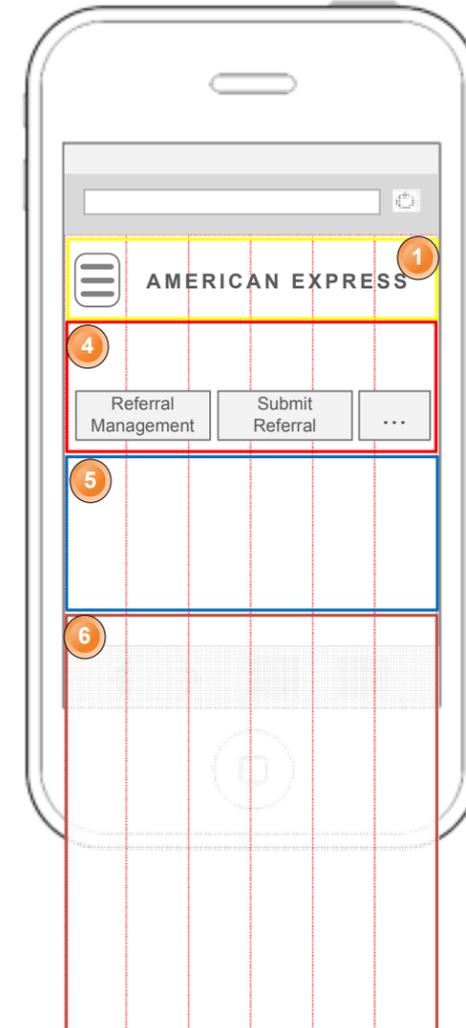
7. At this width, the table displays only the "Sales Person" and "Active" columns. However, the "Active" header should be replaced by an icon or should be hidden so the header row doesn't get too cramped. The column of check boxes remains either way.

Annotations





Annotations





1

MY ACCOUNT CARDS TRAVEL REWARDS BUSINESS

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 [Close](#)

Reason for Rejection: Insufficient annual spend Referral Reference ID: 12345678

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	10 Annual Company Revenue €2,000,000 - €5,000,000	
Product of Interest Corporate Card	BTA and/or Card opportunity	
11 Additional information	Travel Management Company Actions To Date	

12 Re-Submit [Close](#)

13 **Referrals Under Review** 162 [See Complete Report](#)

Contact Information

Company Information

Comments

Additional Company Information

Annotations

1

5

6

7

8

9

10

11

12

13

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** [Close](#)

Reason for Rejection: Insufficient annual spend

Contact Information

Company Name: ABC Corp
 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:

Comments

Additional Company Information

Re-Submit [Close](#)

Referrals Under Review 162 [See Complete Report](#)

Annotations

1. AMERICAN EXPRESS logo

2. Search bar

3. Hamburger menu icon

4. Table header

5. Table row

6. Form fields (Company Name, Contact Info)

7. Close link

8. Form fields (Address, Telephone, Email)

9. Form fields (Registration Number, Revenue)

10. Form fields (Partnership, Product of Interest)

11. Additional information text area

12. Re-Submit button

13. Referrals Under Review table

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

1 Header navigation area containing the American Express logo and links for MY ACCOUNT, CARDS, TRAVEL, REWARDS, and BUSINESS.

2 User profile area showing 'United States (Change Country)' and a 'LOG IN' button, along with a search bar.

5 **Partner Management** section containing a paragraph of Lorem ipsum text.

6 **Add New Partner** button.

7 **Partner Requests to Review** section header.

8 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

9 **Authorizing Officer Email Address**: jane.smith@xyzllc.com

10 **Company Name**: XYZ LLC.

Authorizing Officer First Name: Jane Smith

Type of Partnership: Travel

Authorizing Officer Last Name: [Redacted]

Street: 123 Main St

Authorizing Officer Phone Number: 1234-456-7890

City: Amsterdam

Postal Code: 123456

Province: [Redacted]

Country: Netherlands

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

12 **Approve** and **Deny** buttons.

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
ABC Corp.	John Doe	Jul 15, 2013	Type A

13 **All Partners** 123

1 Header bar of the form modal.

5 Input field for Authorizing Officer Email Address.

6 Input field for Company Name.

7 Input field for Authorizing Officer First Name.

8 Input field for Authorizing Officer Last Name.

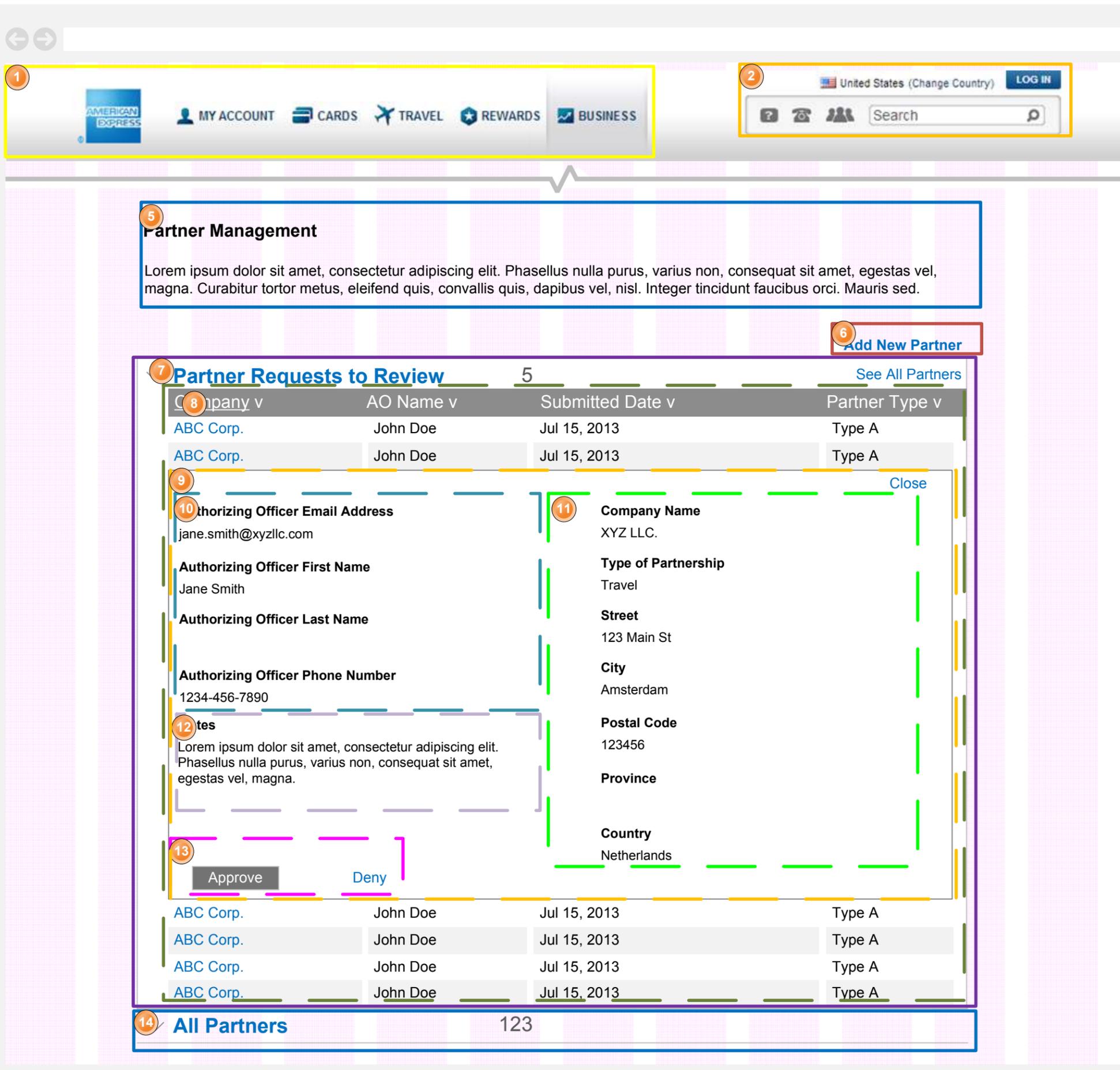
9 Input field for Authorizing Officer Phone Number.

10 Input field for Type of Partnership.

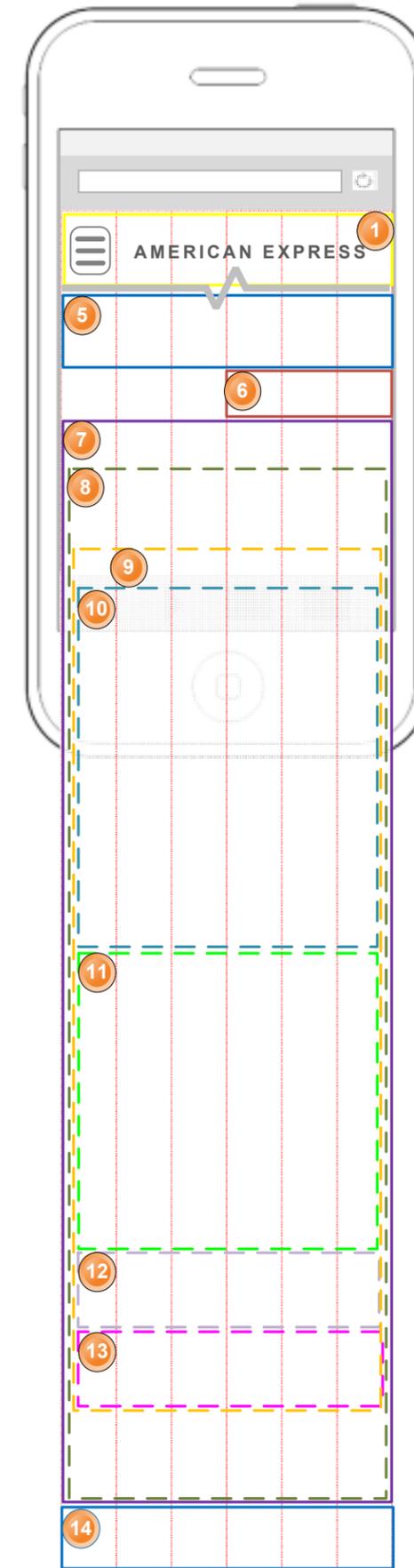
11 Input field for Street.

12 Input field for City.

13 Input field for Postal Code.

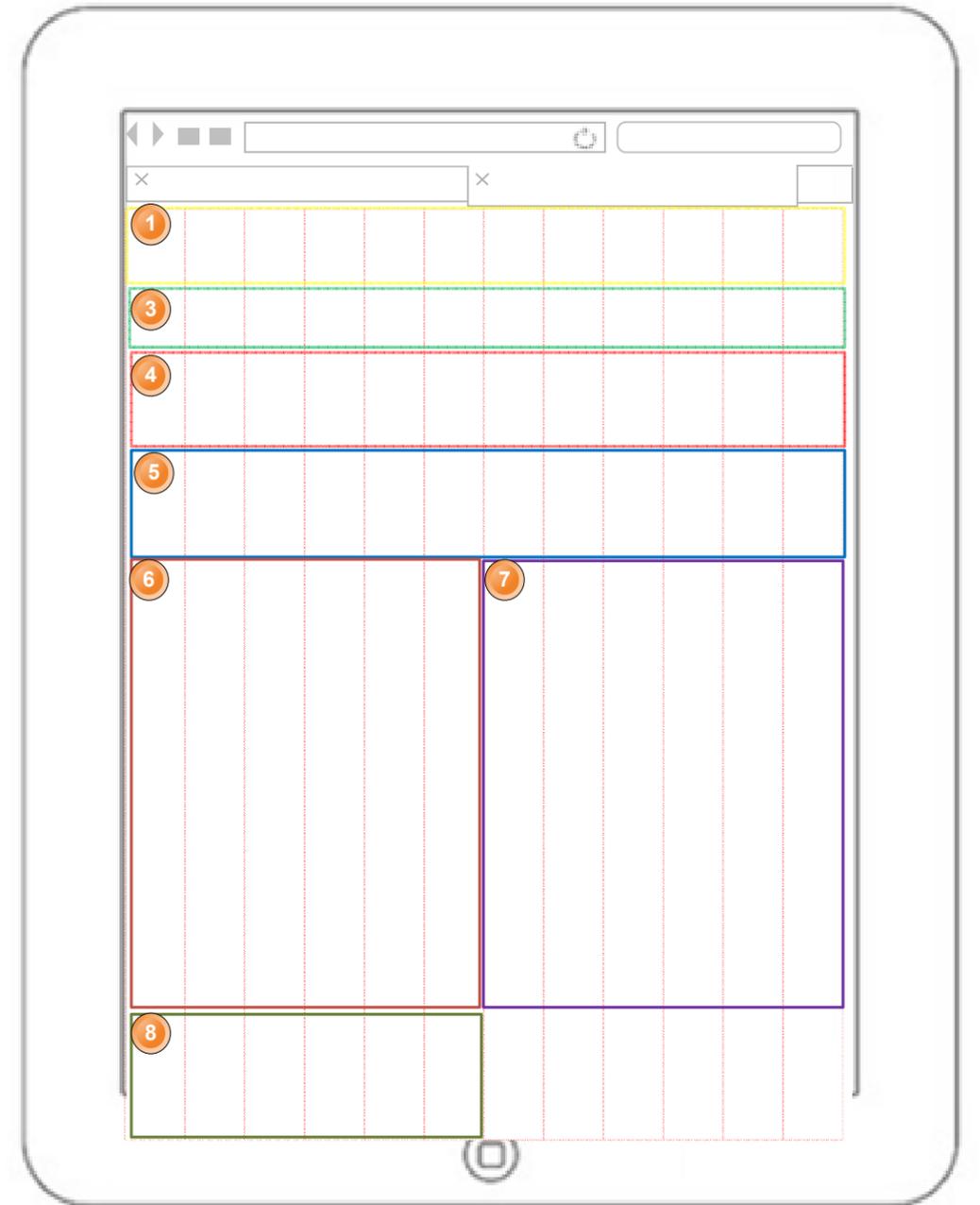
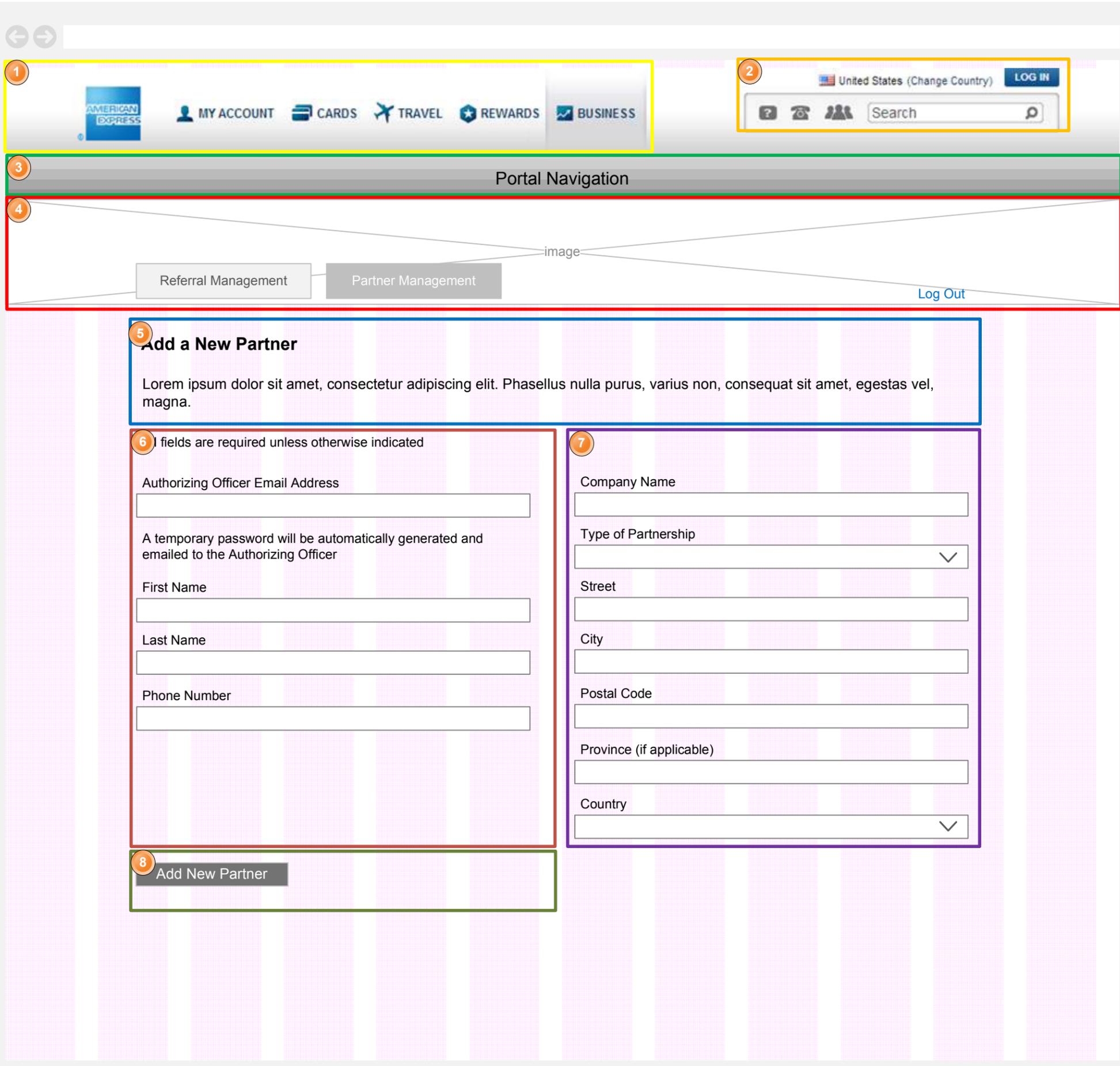


Annotations

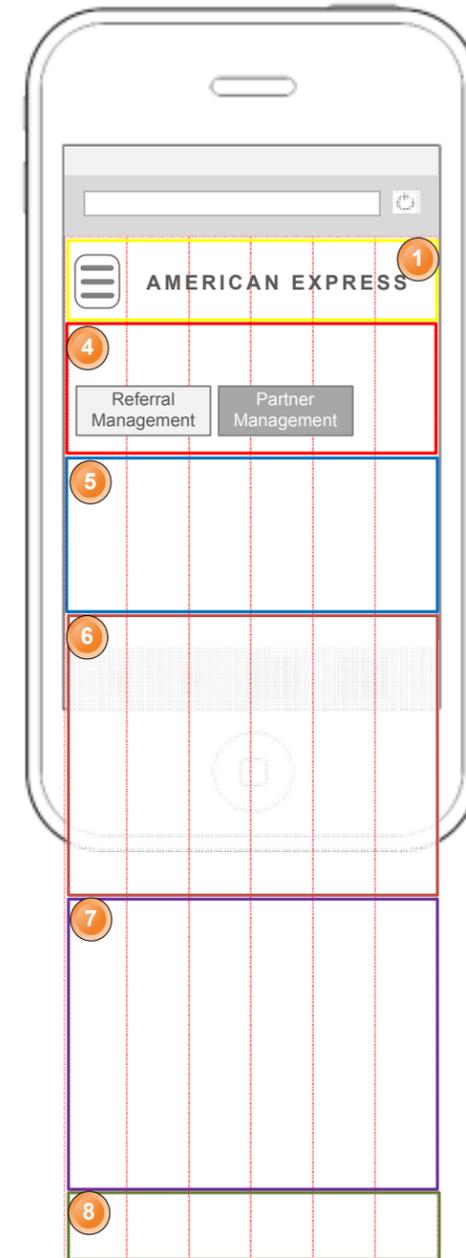
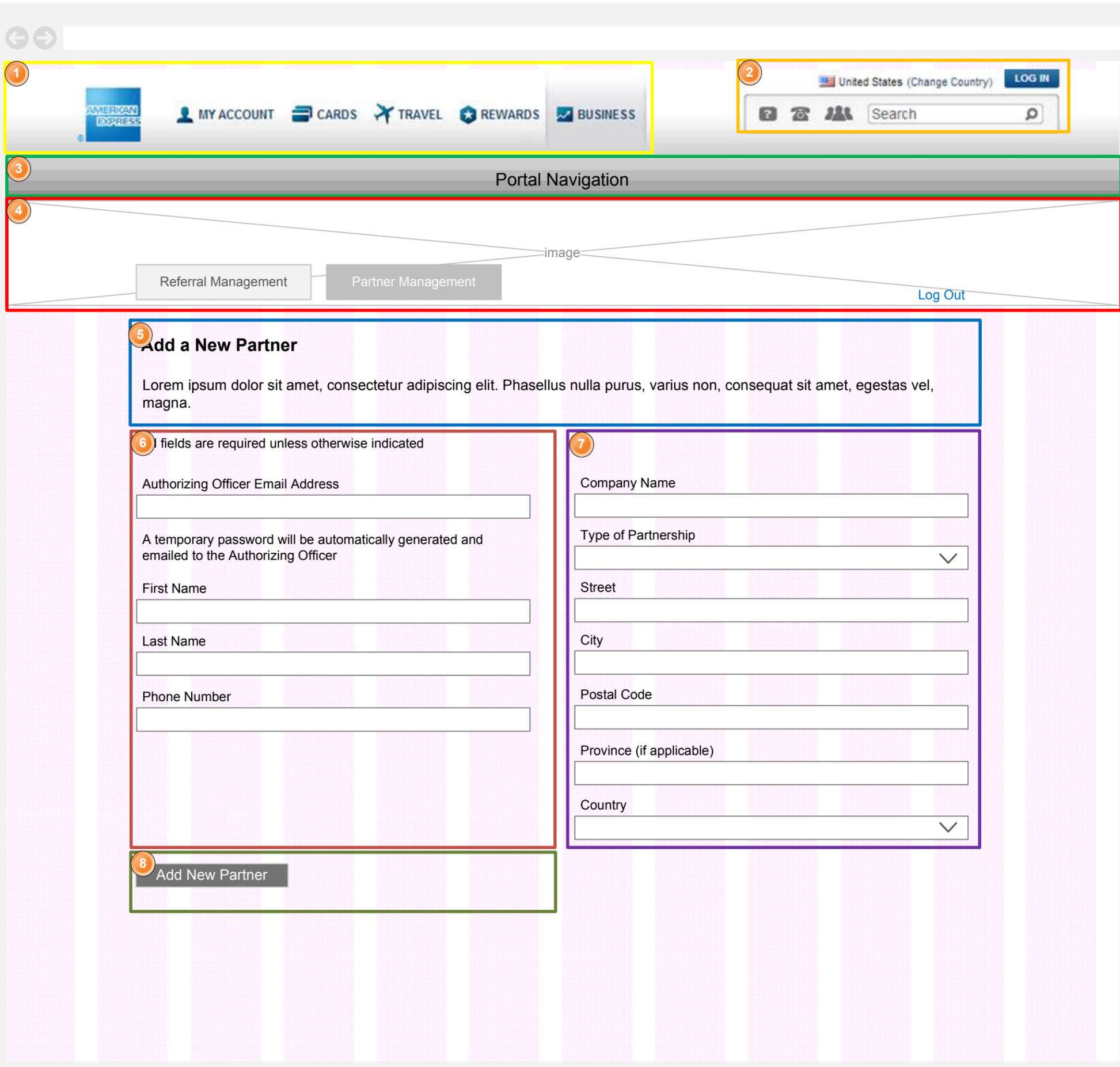


- 8. As the width decreases, the columns become hidden in the following order:
Partner Type, Submitted Date, AO Name
- 9. The "Close" link becomes an "X" at this screen width.

Annotations



Annotations



Annotations

