Oracle® Partner Relationship Management

Concepts and Procedures

Release 11*i*

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Oracle Partner Relationship Management Concepts and Procedures, Release 11*i*

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Contents

Using Oracle Partner Relationship Management

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Oracle Partner Relationship Management Concepts and Procedures*, Release 11*i

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Preface

Welcome to the Oracle Customer Relationship Management, Release 11*i*, suite of applications.

This Concepts and Procedures guide provides information and instructions to help you work effectively with Oracle Partner Relationship Management. Oracle Partner Relationship Management is also known as Oracle Partners Online.

This preface explains how this guide is organized and introduces other sources of information.

Intended Audience

This guide describes how to use Oracle Partner Relationship Management. The intended audience includes system administrators, database administrators, and others with similar responsibility.

This guide assumes you have an understanding of the company business processes and knowledge of products and services.

Structure

This guide is written and optimized for online help. As online help it is written in short self-contained topics that are linked together with hyperlinks. The topics are optimized for online delivery. This means that this guide is best read in the PDF format. Printing this document makes it impossible for you to follow the hyperlinks between topics.

- "Understanding Oracle Partner Relationship Management" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications.

- "Using Oracle Partner Relationship Management" provides process-oriented, task-based procedures for performing essential business tasks using the application.

Related Documentation and Resources

The following documents provide additional information on installing, implementing, and using Oracle Customer Relationship Management products.

Reference Documentation

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*.

Oracle Applications Product Update Notes, Release 11i

This document contains information about new product features and functions for various Oracle applications.

Oracle Applications System Administrator’s Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage processing.

Oracle Applications User’s Guide

This guide explains how to customize lists of values (LOVs) in the system and enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

Oracle Partner Relationship Management Implementation Guide

This document describes how to set up and configure Oracle Partner Relationship Management.

Additional Product-Related Documentation

Supplemental CRM Installation Steps

This document provides instructions for completing installation of Oracle Customer Relationship Management (CRM) products.

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Oracle Marketing Encyclopedia Concepts and Procedures

This document is a printed compilation of the Oracle Marketing Encyclopedia online help system.

Oracle Order Capture Concepts and Procedures

This document is a printed compilation of the Oracle Order Capture online help system.

Oracle Sales Compensation Implementation Guide

This guide describes set up and configuration tasks required to implement Oracle Sales Compensation.

Understanding Oracle Partner Relationship Management

This topic group provides an overview of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications. Oracle Partner Relationship Management is also known as Oracle Partners Online (POL).

Overview

Oracle Partner Relationship Management functionality is organized by the following major categories.

- Use the **Home** page to set up and organize appropriate information by creating links to, for example, company news, most recent work projects, and other commonly needed information.
- Use the **Activity** tab to organize and track related tasks, assignments, and activities. Here you can also organize creative materials and other elements designed to promote or sell concepts, products, and services.
- Use the **Opportunities** tab to create and work out opportunities by adding details about the sales transactions, customers, contacts, and type of products and solutions needed.
- Use the **Forecasting** tab to forecast values by investigating current pipeline values (weighted pipeline won to date).
- Use the **Customer** tab to keep summary customer details and identify a sales team that is working on a specific opportunity.
- Use the **Partner**s tab to find information about partner organizations and particular partner employees.

- Use the **Compensation** tab to access functionality of Oracle Sales Compensation and view the summary detail about employee compensation plans.
- Use the **Fulfillment** tab to create and investigate collateral requests that have been issued.
- Use the **Encyclopedia** tab to set up and manage a content repository.
- Use the **Administration** tab to organize and maintain Sales, Partners, opportunity exchange, and other setups. The application administration team assists in these tasks.

Tab Access by User Responsibility

TAB MATRIX	ACCESS			
Tab Name	**Partner**	**Vendor User**		
		Assignment Manager	Channel Manager	System Administrator
Home	Y	Y	Y	Y
Activity		Y	Y	Y
Opportunity: varies with the user	Y	Y	Y	Y
Forecast		Y	Y	Y
Customer		Y	Y	Y
Partner		Y	Y	Y
My Company	Y			
Compensation	Y	Y	Y	Y
Fulfillment		Y	Y	Y
Encyclopedia	Y	Y	Y	Y
Administration				Y

Navigation

Navigate through the application by clicking tabs, subtabs, buttons, and context-sensitive links. These user interface elements link the web of content for Oracle Partner Relationship Management in a logical progression.

Interface Element	Explanation
Tabs	Organize the broadest functional areas of information relevant to this application according to tasks, opportunities, partners, and customers, for example.
Subtabs	Display the hierarchical structure of information by showing the subdivisions of the broader categories: for example, for Partner Detail the subdivisions are Organization and Person.
Context-sensitive links	Provide shortcuts to related subdivisions of the topic on the subtab: for example, Partner Detail links take you to details about the partner's sales team, opportunities, organization relationships, interactions, and contacts.
Buttons	Serve various functions, such as initiating a search, changing the view of an array of data, performing a matching operation, or setting a parameter (range of days) in a search.

Choose a functional area and choose a view. Click links to go to further detailed information.

Terms and Definitions

Term/Acronym	Definition
Assignment Manager (AM)	Assignment Manager from the vendor side is responsible for assigning opportunities to Partners; shares some tasks and maintains a relationship with the Channel Manager; handles the initial sales deal and the matching and ranking; front end of the process.
Broadcast (parallel) Assignment	In this multiple parallel routing assignment option, the AM assigns an opportunity simultaneously to multiple partners, and whoever accepts the opportunity first is the partner on the opportunity.
Channel Manager (CM)	Channel Manager owns the relationship between the vendor and the partner and bears responsibility for managing and distributing information to the partners.
Channel Manager Timeout	This timeout period can be defined based on the CM's country. The period starts when a CM receives the opportunity assignment notification by the AM. Within this period a CM can decide to accept the assignment, replace the original partner with a new partner of his own, or reject the assignment altogether. If the CM does not act on the assignment, the opportunity automatically goes to the assigned partner when the CM timeout expires.
Opportunity Status	Stages in the sales opportunity assignment process can represent the progression from leads to opportunities to orders. Possible statuses include **new, offered, unassigned, matched, active, won, lost, inactive**.
Partner Manager	Main contact person for the partner: responsible for administering all opportunities assigned to the partner; the one to receive various email notifications and to accept or decline opportunities on behalf of the partner organization.
Partner Rank	During the partner matching process, partners returned from the selection criteria are ranked based on the score returned by the Oracle context server search.
Partner Timeout	This timeout can be based on a partner's country. The timeout starts as soon as the partner is offered an opportunity. During this time a partner can accept or reject an opportunity.
Phone Support	Secondary support person for the partner, sometimes from the call center.
Preferred Partner/VAD	The desired distributor specified by an end customer for a specific sales deal, even though the vendor may offer the deal to another partner.
Serial Assignment	In this routing option, AM assigns a lead to multiple partners in serial order. If the top-ranked partner offered the opportunity rejects it, it is offered to each successive partner until it is accepted or until all partners in the serial list have received the offer.
Single Assignment	In this routing option, AM assigns one opportunity only to the top ranked partner.
Timeout period	In the stages of opportunity assignment, a timeout period is the time during which a partner is expected to respond before the next action occurs; these time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and opportunity status changes.

Value Added Distributor (VAD)	A Value Added Distributor purchases from the vendor and resells to the Value Added Reseller or to the ultimate end customer. A partner can have a CM responsibility, administering one or more VARs on behalf of the vendor.
Value Added Reseller (VAR)	A business partner managed by a VAD or vendor; sometimes referred to simply as a **partner**.

Functionality

Oracle Partner Relationship Management captures basic CRM functionality in the areas of Customer and Contact Management, Opportunity Management, Task Management, Interaction History, Personalization, Forecasting, Collateral Fulfillment, Sales Compensation, and Marketing Encyclopedia Integration.

In addition, to address the needs of the indirect channels Oracle Partner Relationship Management has partner-specific functionality such as partner profile management, partner routing, assignment, and review. This functionality enables greater personal productivity through easier management of resources and territory, automated workflow routing, and communications as work statuses change.

For more detail see these topics:

- Personal Productivity
- Resource Manager Functionality
- Territory Manager Functionality
- Workflow and Email Alerts

Personal Productivity

Functionality in this area increases the efficiency of the vendor sales agent by providing advanced searches, tasks, notes, attachments, and interaction tracking. This allows the vendor agents to do the following tasks:

- Create personalized searches
- Save personalized queries
- Conduct advanced searches upon customer, contact, and opportunity
- View, manage, and sort personalized tasks
- Associate personalized tasks with customer, contact, and opportunity
- Define, view, and sort various types of notes

- Define roll-up of notes by customer, contact, and opportunity
- View and export all notes in a concatenated format
- Access and view various attachments
- View interaction history associated with the customer and contact.

Partners have access to similar functionality.

Resource Manager

Resource Manager provides the capability for a sales manager to easily add and update sales agent and partner profiles. It enables the manager to import a sales group hierarchy from Oracle Human Resources on the vendor side and to create and maintain agent and group profiles for the vendor or partner.

For further information on how to do these tasks, refer to *Oracle CRM Foundation Concepts and Procedures*.

Territory Manager

Using Territory Manager for the sales paradigm enables a manager to define channel segments and formulate channel strategies. Territory Manager provides the means for:

- Sales managers and Assignment Managers to easily define territory groups and assign resources to the territory
- Users to administer Assignment Manager territories and accounts
- Users to view the hierarchy of territory groups, territories, the people associated with them, and their accounts

For further information on how to do these tasks, refer to *Oracle CRM Foundation Concepts and Procedures*.

Workflow and Email Alerts

Through Workflow, Oracle Partner Relationship Management increases the vendor and partner efficiency by automatically updating opportunity statuses and automatically routing opportunities to and from various parties. Oracle Workflow features and notifications include:

- Automatic email alerts to Channel Managers to notify of matched partners within the Channel Managers' territory.
- Automatic opportunity status update to **offered** to the partner when the Channel Manager has approved it.
- Automatic routing of an opportunity to the assigned partner when the Channel Manager's timeout period for processing the opportunity expires.
- Automatic email alert of offered opportunities to assigned partner.
- Automatic routing of opportunities to assigned partners for the various assignment options: single, serial and broadcast.
- Automatic opportunity status update to **active** upon partner acceptance.
- Automatic opportunity status update to **recycled** when Channel Manager or partner declines the offer.
- Configurable workflow feature, for example, automatic notification of recipients when specified events occur.

The workflow internal hame is PVLEADAS. The display name is PRM Lead Assignment.

Partners have access to similar functionality.

Understanding Responsibility Assignments

In Oracle Partner Relationship Management users can access only the functionality needed to perform the tasks associated with their responsibility level. Four levels of responsibility differentiate user access to specific functionality in this application.

- Assignment Manager
- Channel Manager
- Partner Contact
- System Administrator

Assignment Manager

Assignment managers perform a variety of tasks, including these activities.

Create Opportunity

- Capture leads from fax, Web, email, and phones as they are created in or imported from Oracle TeleSales or Oracle Sales Online and changed into indirect opportunities.
- Create opportunities.
- Add notes, contacts, product interests, and other information about the opportunity.

Match Partners

- Review partner list from Automatic matching, preferred partner, recycled partners.
- Perform manual search for partner.
- View partner history.
- Apply common attributes to match partners automatically.
- Apply vendor-defined attributes and business attributes to match opportunities manually.
- Modify partner list: add, delete, or change the ranking, run manual search, add to partner list.

Assign Opportunity

- Determine the format for assigning an opportunity: single, serial, broadcast.
- Assign opportunity to the Channel Manager.
- Send out an assignment or table it until appropriate.

Maintain Opportunity

- View/update Opportunity.
- Monitor the status of each opportunity as involved parties (AM, CM, Partner) shepherd them toward closure.
- Support agent-rejected opportunities and recycle them.
- View Workflow audit trail in View History page.
- Update capabilities to approve or reject an assignment and modify assigned partner.

Create Customer

- Capture and display historical interests, opportunities, quotes, interactions, and sales associated with a contact.
- Capture user-defined profile information: demographic information, outside interests, previous positions.

Maintain Customer

- Maintain summary and detailed contact information within the context of an organization.
- View organization and contact hierarchy.
- View data on sales team members associated with an organization.
- Support multiple addresses for an organization or contact.
- Make inactive or restrict all access to a contact record.
- Flag a contact record as **Do-Not-Mail**, **Do-Not-Call**, or **Do-Not-Email** with valid duration dates.
- Run Concurrent Programs.

  For detailed instructions on how to run and maintain concurrent programs, refer to:

  - *Oracle Sales Online Implementation Guide*
  - *Oracle Applications User's Guide*
  - *Oracle Applications System Administrator's Guide*

Create Partner and Partner Contacts

- Create partner profile in both the Vendor and the Partner tabs.
- Manage partner profile details.
- Use the Quick Find and Advanced search capabilities and Save Query to find relevant partner and personal information.
- Enter and maintain several types of information, such as:

  * Specific partner solutions and services, preferred value added distributor

  * Target revenue and revenue to date

* Associated support staff on the vendor side, such as Channel Manager and the phone support person
* Partner contacts and user registration: contact login and password.

Request Collateral

Identify specific people or contacts to receive collateral.

Back to top: Understanding Responsibility Assignments

Channel Manager

Channel Managers perform a variety of tasks and act as liaison between a vendor and a partner. They perform many of the same tasks Assignment Managers perform, but they do not do the matching process. For more detailed descriptions of tasks and responsibilities that Channel Managers share with Assignment Managers, see Assignment Manager Responsibilities.

Channel Manager tasks include the following:

- Review matched opportunities from the Opportunity Summary window.
- Modify and update an opportunity assignment: adjust partner rankings and change partner name (through the opportunity assignment table on the Opportunity Main Details page that displays only when the opportunity is awaiting the CM's response).
- Generate partner lists and decide whether to offer an opportunity to a partner.
- Choose to accept or decline an opportunity assignment.
- Maintain the partner matching records: update, make manual matches and ranks.
- Create Partners.
- Create opportunities.
- Set up a partner in a compensation plan (optional).

  To do this, the Vendor must have access to Oracle Sales Compensation. Refer to the *Oracle Sales Compensation Implementation Guide* for details.

Guidelines

When the Channel Manager has approved an opportunity, workflow automatically changes the opportunity status to **offered** and routes the opportunity to the Partner.

In the time period between the Channel Manager's acceptance of an opportunity assignment and the Partner's acceptance of an opportunity, the Channel Manager will not see the opportunity assignment table at the bottom of the Opportunity Main window.

On the Opportunity First Sale, the sales team should include the original creator, Channel Manager, Assignment Manager, and partners.

Back to top: Understanding Responsibility Assignments

Partner Contact

Partner access to Oracle Partner Relationship Management enables them to do the following:

- View their own profiles.
- View offered, active, inactive, won, and lost opportunities.
- Accept/decline an offered opportunity.
- Modify, update, and progress the opportunity after it is accepted.
- View related customer and contact information for opportunities they have accepted.

Back to top: Understanding Responsibility Assignments

System Administrator

System Administrators perform a variety of tasks. System administrators alone have the responsibility to:

- Decide, set up, and adjust routing and response timeout periods.
- Create and set up custom attributes used to describe the partner profile.
- Set up valid status codes that define who should get email notifications.

For other tasks and responsibilities that system administrators share with Assignment and Channel Managers, see Assignment Manager and Channel Manager Responsibilities.

Back to top: Understanding Responsibility Assignments

Tracking Opportunity Flow and Status

OPPORTUNITY FLOW					
Create Opportunity	**Match Opportunity with Partner**	**Assign Opportunity to Partner(s)**	**Channel Managers Review Assignments**	**Partner Accepts/ Declines Opportunity**	**Process Partner**
Import from Oracle Telesales Enter manually into OTS Enter manually into PRM	Rank partner: Automated search Manual search	Options for offering: single, serial, broadcast	Assignment options: approve, reject, modify CM timeout sends lead to partner	Partner accepts or declines the opportunity: If partner accepts, status changes to Active. If partner declines a **single** offer, it returns to unassigned pool. If partner declines a **serial** offer, it goes to next partner.	Track partner's progress with opportunity Opportunity statuses: on hold, won, lost, recycled
Opportunity Status: unassigned Access: AM, CM, Phone Support	Opportunity Status: matched Access: AM, CMs if they enter the opportunity	Opportunity Status: matched Access: AM, CMs if they enter the opportunity	Opportunity Status: matched Access: AM, CMs of the assigned partner	Opportunity Status: offered Access: AM, CM, Partner	Opportunity Status: active, won, lost, on hold, recycled Access: AM, CM, Partner
AM = Assignment Manager CM = Channel Manager					

For opportunities that are approved by the Channel Manager:

- Workflow automatically changes opportunity status to **offered** and routes the opportunity to the partner.
- The opportunity assignment table in the Opportunity Summary window cannot be modified by the Channel Manager during the time period between the Channel Manager's acceptance and the Partner's acceptance of the opportunity.
- If the offer is declined and it is a single offer, Workflow automatically reroutes it to the Channel Manager with **recycled** status.
- If the offer is declined and it is a serial offer, Workflow automatically reroutes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.

Vendor Access

For Vendors, Oracle Partner Relationship Management functionality is organized by these tabs.

- **Home**
- **Activity**
- **Opportunity**
- **Forecasting**
- **Customer**
- **Partner**
- **Compensation**
- **Fulfillment**
- **Encyclopedia**
- **Administration**

Home

Set up this page by creating links to appropriate information that you choose, for example, links to company news, most recent work projects, and other commonly needed information sources. The lead bins on this page display only the leads assigned to the user's specific sales group(s).

For information about setting up the Home page refer to *Oracle Sales Online Implementation Guide*.

Activity

Set up this area to track related tasks, assignments, and activities. Organize creative materials designed to promote or sell concepts, products, and services.

Task tabs also appear for other more specific topics, for example, for Opportunities, and the tasks created there are specifically related to a particular opportunity.

Return to top: Vendor Access

Opportunities

Initial sales stages can progress to opportunity, sometimes to quote, and finally into orders. Oracle Partner Relationship Management focuses on the opportunity stage, during which you can add details about the sales transaction, the customer, contacts, and types of products and solutions needed. This stage entails a great deal of organizing and processing.

The **Opportunity Summary view** displays information for Opportunity, Customer, Sales Stage, Win Probability, Status, Close Date, and Amount.

Opportunity Management

Vendors can use Oracle Partner Relationship Management functionality to analyze their pipelines. Real time reports for the vendor side can be created for any prospect, sales representative, or sales group by sales channel, sales status, and sales stage.

Opportunity Summary Detail

Summary detail appears in this initial window with links to further detail about the total budget and partner specific type of data such as vendor purchase items and solutions and services. Through integration with other Oracle sales products Partner Relationship Management also displays in this centralized summary window all direct and indirect opportunities pertaining to each sales team representative. Each representative sees opportunities relevant only to himself.

Links from this **Main** window access more detailed information about **Contacts, Sales Team, Notes, Tasks, Classification**, **Competitors,** and **Attachments**. These represent general areas of information and categories similar to Oracle Sales Online functionality. Oracle Partner Relationship Management adds to that track of processing and procedures through the **Match Opportunity** and **View History** buttons, links from the Main window.

View History

The View History window shows the routing progression of an opportunity and other details. It tracks several opportunity factors:

- The point at which an offer is rejected, accepted, matched
- The assignment types
- Comments concerning the opportunity

Partner Matching--Automatic Matching

The **Match Partner** button opens access to the maintenance windows for partner matching. The initial window indicates results of Automatic Matching based on the original matching criteria selected at setup, for example, country, partner type and level. Matching criteria are set up in the Administration tab. This allows the business to specify high priority characteristics in the matching process at the site level.

The **Partner List** shows which partners are matched with specific opportunities. A **Recycled** status appearing next to a partner name on the list indicates that the partner has previously rejected the opportunity in a prior routing.

The Partner list also indicates rankings of the matches for the opportunity. When a partner match is not achieved, the automatic matching feature drops the lowest ranked criteria successively until a match is achieved.

This list can be edited and adjusted with additional manual search results. If a preferred partner or VAD rejects an opportunity, the partner list displays the recycled note next to the partner name.

Partner Matching--Manual Matching

Manual Matching supplements the partner list by searching for specific attributes, such as country, geographic (multi-national), partner type (VAD), partner level (Platinum Program), vendor certification, customer support capability (more or less than $1 million). Multi-selection of some attributes such as **country** is allowed.

Any partner can be added to the specific opportunity’s partner list. A vendor might want to manually add a partner to an opportunity, for example, to reward a partner or to match the opportunity with another strong partner. The routine options for sending an opportunity to partners include single, serial, and multiple-parallel routing.

Partner Assignment

The finalized partner list with the desired assignment option selected is routed to the Channel Managers and partners, who take the next step.

The **Assignment Detail** window shows a list of partners to whom an opportunity is assigned. This window links to **Unassigned Opportunities**.

If Assignment Manager (AM) cannot achieve a matching partner list that seems appropriate for an opportunity, the AM can return to this step and then send out the assignment later. If any partner information changes (for example, a partner location), that may change the partner matching consideration for specific opportunities.

Contact Window

The predefined view of Sales Partners, Contacts, and Exchange Partners displays identifying information about the contact and the employee relationship details.

Sales Team

The sales team contains members from both the Vendor and Partner organizations eventually, and the team composition changes over time. Initially the team comprises the people who created the transaction; later it includes the Channel Manager as well as the partner who accepts the opportunity. The sales team handles this particular sales opportunity playing specific roles.

Classification

Classification is used to further describe the opportunity, such as specific customer purchasing needs. Examples of specific ranking criteria to be used in the matching process are, for example, geographic location, certification, and vendor products. Update, restore, or remove these classifying attributes.

Competitors

In this Opportunity Detail window, find out who you are competing with.

Attachments

In this window add any document associated with the transaction, such items as proposals, notes, videotaped presentations. Document additions and updates are possible.

Return to top: Vendor Access

Forecasting

Use this tab to forecast values by investigating current pipeline values (weighted pipeline won to date). Sales representatives can create and revise opportunity purchase probability. Vendor executives can create their own views of the sales representatives' forecasted opportunities and can also track forecast adjustment histories.

Partners can not access this function at this time.

For information about opportunity and forecasting administration refer to *Oracle Sales Online Implementation Guide*.

Customer

The Customer subtab, **Organizations**, lists summary customer details. When the customer name is selected, the **Main** summary window appears first, with links to **Relationships, Opportunities, Notes, Sales Team, Tasks, Interactions, Attachments**.

The Main summary subtab displays **Organization Detail**, including addresses, annual revenue, total employees, year established, Web site, Lifetime Value. Other customer-related menu choices include information about the sales team working on a specific opportunity.

Return to top: Vendor Access

Partner

This area displays details of the Partner organization and of specific partner contacts. All steps performed in creating a partner, whether for a new or an existing organization, must occur within the Partner tab.

Predefined views available on this Partner Summary page present information about each type of partner: general, sales, and exchange. Exchange partners can participate in the opportunity exchange system between multiple vendors and a partner. A sales partner has a specific partner agreement that allows the vendor to pass a sales deal to that partner through Oracle Partner Relationship Management. General partners (all) are any parties in the CRM modules that have a **Partner of** relationship with another organization or person. General partners include sales and exchange partners.

Partner Organization Detail

Look at the summary details for information about a partner organization: the partner level, purchase method, target revenue, Channel Manager name, the preferred VAD, and revenue to date. Partner Details include the amount of money a partner has made, the last assignment made, and whether it is a preferred VAD.

From this window, a partner can be enabled for **Opportunity Exchange**. Opportunity exchange is an Oracle Sales Online concept that depends on a centralized data base that is used like an exchange system and third party applications where information and sales opportunities are exchanged. Opportunity exchange occurs between all partners in the system. Oracle Partner Relationship

Management supports an internal vendor who may pass sales opportunities to only their Oracle partners. Oracle Partner Relationship Management captures some critical opportunity exchange information to enable integration to the opportunity exchange type of functionality within the CRM suite.

Partners can be eligible for **Automatic Matching** if they are a sales partner when the internal business has agreed to share sales opportunities with the specific partner.

Revenue fields are free text form, so calculation is not automated.

A partner can be assigned the partner general attributes: for example, geographic coverage (local), industry vertical (financial), vendor products (applications), vendor certification, partner services and solutions, marketing program, and vendor-defined attributes. These attributes inform the vendor about the partner and aid in appropriate opportunity matching.

The relationship type **Partner of** drills down into Organization Details, and reciprocally, from the Organization Details, the user can drill down to see Partner Details.

Partner Contact Detail

This window offers a filtered view of specific partner contacts. The list is set up only for those parties who have been identified with a partner (Partner of) or Value Added Distributor (VAD of) relationship. Usually, these contacts have a login through the extranet if they have been put into the system.

The summary person detail includes contact's name, relationship (mainly, employee of one or more partners), organization, role, address, phone number, email address.

Return to top: Vendor Access

Compensation

For users who have purchased Oracle Sales Compensation, this tab accesses the functionality of Oracle Sales Compensation and shows the summary detail of the user's compensation plan and salespeople. Access enables Planning, Compensation Plan, Income Planner, and Reports.

From Planning, **My Compensation Group** summary is the first window and includes the name of the group and start and end dates of a plan that has been set up on the vendor side.

Income Planner calculates and shows a salesperson's commission for a particular transaction.

Fulfillment

Through integration with Oracle CRM Foundation One-to-One Fulfillment, users can send collateral to their contacts and prospects.

The collateral request is a means of creating new collateral requests and finding information about the collateral pieces and information that have been sent out. Request Status displays the request identifier, status, server, agent, and the time submitted.

Refer to the One-to-One Fulfillment section of the *Oracle CRM Foundation Implementation Guide* for information about setting up Fulfillment.

Return to top: Vendor Access

Encyclopedia

The Marketing Encyclopedia System (MES) is a content management and repository area where you can set up your own information and messages through links to computers, services, competitors, products, and marketing.

To customize this page to fit your business needs and communicate global messages or announcements, edit the jtfloginb.jsp file using an HTML or text editor.

Deploy Oracle Marketing Encyclopedia to display news feeds out of MES on this page.

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia Concepts and Procedures*.

Administration

Use this tab to organize and maintain opportunities, sales, partners, and opportunity exchange. These administration windows enable general system maintenance and are appropriate for the System Administrator responsibility level. From this tab the administrator can set up timeouts, status codes, attributes, and attribute values. Neither the Assignment or Channel Manager has access to these windows unless they also have system administrator responsibilities.

These aspects of administration are addressed in the *Oracle Partner Relationship Management Implementation Guide*.

Return to top: Vendor Access

Partner Access

Extranet (password secured access) functionality for the Partner is organized by the following major categories on these tabs:

- **Home**
- **Opportunity**
- **My Company**
- **Compensation**
- **Encyclopedia**

Home

The Partner can view company and business news in this window if the vendor creates and sets up the links. The lead bins on this Home page display only the leads assigned to the user's specific sales group(s).

Opportunity

The Opportunity function is the Partner's main interest and where most activity occurs. Opportunity Summary enables the partner to identify projects and total budget. It displays information about the Company, Partner, Sales Stage, Win Probability, Close Date, Local Amount, Amount, Timeout**.** Opportunity Detail shows players, budget committed, win probability, and opportunity description in terms of dates and status and channel. The record also charts vendor purchase items (item and amount) and solutions and services (product and amount).

Opportunity summary detail can be viewed from a **system status**, indicating whether an opportunity has been Offered, is Active (partner has accepted and is updating or modifying it), Won, or Lost.

From the **Offered Opportunity** view, the Description link shows offered opportunity detail. Information is categorized as **Main, Contacts, Notes, Sales Team, Classification**. The Offered Opportunity view permits Read Only: it does not allow partners to change the data unless they have accepted the opportunity. Also, the customer and contact details are restricted to the main details.

Through integration with other Oracle sales products Partner Relationship Management can display in this centralized location all direct and indirect opportunities pertaining to each sales team representative. Each representative sees only opportunities relevant to himself.

After the partner has accepted an opportunity, some details can be revised. From the **Active Opportunity** view, activated when a partner accepts an opportunity, the partner can update categories. Through the **Description** link, the active opportunity summary detail appears in the same format as in the Offered view, and now the form can be updated. A partner can fill in the project name and total budget, add to vendor purchase items or supply new amounts for them, and adjust for partner solutions and services. Additionally, more customer and contact details are available for viewing.

Return to top: Partner Access

My Company

Partners see the information on this tab about their own company when they log in. The information is organized in these subtabs: **Main, Relationship, Notes, Sales Team, Interactions**.

The Company profile includes information about the fiscal year, annual revenue, last order, tax ID, Web site, year established, and number of employees, among other things.

Personal profiles of partner contacts show addresses, phone numbers, and relevant business details for team members. This information is View Only.

Compensation

This function is useful to the Partner only if the vendor creates the Partner as part of the compensation plan.

The Compensation tab accesses the functionality of Oracle Sales Compensation and shows summary detail of the user's compensation plan. Access enables Planning, Compensation Plan, Income Planner for calculation, and Reports.

From Planning, **My Compensation Group** summary is the first subtab and includes the name of the group and start and end dates of a plan that has been set up on the vendor side.

Income Planner calculates and shows the salesperson's commission for a particular transaction.

My Compensation Plan indicates the sales role, plan state, start and end dates, plan status.

My Salespeople details include name, job title, employee, compensation group, sales role, plan state, start and end dates, plan status, whether to distribute.

Return to top: Partner Access

Encyclopedia

The Marketing Encyclopedia System (MES) is a content management and repository area where you can set up your own information and messages through links to computers, services, competitors, products, and marketing.

For more information about Marketing Encyclopedia, see *Oracle Marketing Encyclopedia Concepts and Procedures*.

This tab parallels the features on vendor windows.

Return to top: Partner Access

Using Oracle Partner Relationship Management

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Using Quick Find

The Quick Find feature provides a way to search for specific information. The kinds of search information vary with the CRM module.

Steps

The Quick Find feature consists of two fields.

1. Use the list in the first field to identify the search category of information.
2. Use the second field to enter one or more words, letters, or symbols to define the search.
3. Click **Go** to initiate the search.

The Search Results window displays the matches to your query.

Guidelines

Enter the plus sign (+) in front of a letter in the search definition to make the letter mandatory in the search result. Enter the minus sign (-) to exclude a letter from the search result. Quick Find does not support "wild cards".

Viewing Partner Summary Detail

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner tab: Partner Summary Detail

Steps

1. View summary details of partner organizations by selecting View By either All Partners, Sales Partners, or Exchange Partners.

For information on how to use the search capabilities, click **Quick Find**.

2. Drill down through any link to see and add more information on these topics.
3. Click **Create** if you wish to create a partner.
4. When modifications are complete, click **Update** to save changes.

For background description, go to Partner summary detail.

Creating/Viewing Attributes

Help is available on these topics.

- Adding/Removing Partner Attributes
- Adding/Removing Opportunity Attributes
- Viewing Active Opportunities Attributes
- Creating Active Opportunities Attributes

Adding/Removing Partner Attributes

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner tab> Partner Summary Detail

Steps

1. Click **Attributes** for a specific organization.
2. In the Attribute field select a general attribute from the LOV, categories such as Functional Expertise, Partner type, Industries, and Geographic Coverage.
3. Add more specific detail in the Description field.
4. Assign a value in the Value field from the LOV.
5. Click **Update** to save changes.

Guidelines

When attributes are associated for a particular partner on the user interface, the concurrent program PV Refresh Attribute Text Table must be run in order for the partner to be linked to these attributes in the partner database tables behind the scenes. After the program is run, this partner can be used in partner matching with these new characteristics. Refer to the *Oracle Partner Relationship Management Implementation Guide* for more detail.

For background description, go to Partner summary detail.

Viewing/Modifying Partner Profile Details

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner > Customer Main Window

Partner > Organization Summary > Organization Details

Partner > Organization Summary > Organization Details/Relationship type Partner of, VAD of

Steps

1. View and/or modify Partner Profile Details in this window.
2. Fill in Relationship and Partner descriptions: purchase method, target revenue, preferred VAD, revenue year to date.
3. Identify Channel Manager and phone support person.
4. Click checkboxes to enable for Opportunity Exchange and Automatic Matching, if appropriate.
5. Click **Update**.

For background description, go to Partner summary detail.

Creating a Partner

Use this procedure if an organization does not exist as a partner. Use a different procedure to modify an existing organization as a Partner.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner > Partner Summary

1. Click **Create**.
2. Fill in details for the organization: name, alias, phone number, email address.

3. Supply other known information, including business line, annual revenue, fiscal year end, total employees, year established, tax ID.
4. For Partner Details, indicate the Relationship (Partner or VAD), start and end dates if they are known, Partner level, purchase method, target revenue, who the preferred VAD is, and the address.
5. Indicate the Channel Manager and phone support person, and the original system reference.
6. Indicate in the checkboxes whether to enable the Partner for Opportunity Exchange and for Automatic Matching.
7. Add a person by filling in the Person Relationships if known: title, name, relationship
8. Add an Organization by indication the name, relationship, start and end dates.
9. Click **Create**.

For background description, go to Partner summary detail.

Modifying an Existing Organization as a Partner

All steps performed in creating a partner, whether for a new or an existing organization, must occur within the Partner tab. The user must perform this procedure twice: once to create the partner relationship for the partner and again for the internal vendor side.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner > Partner Summary

Steps

1. Click **Create**.
2. Search for an existing organization that should be updated as a partner and type the name of the organization in the **Find** field.

   For information on how to use the search capabilities, go to Quick Find.
3. When the organization is selected, the user is automatically taken to the organization detail window.
4. Select **Relationship** details.

5. Select the internal organization as the related organization in the organization-to-organization relationship.
6. Select relationship type **Partner of** or **Relationship of**.
7. Click **Update.**
8. Drill down into the relationship type.
9. Enter Partner details.
10. Click **Updat**e.

To create the partner relationship on the internal vendor side as well:

11. Click **Back** until the Partner Relationship Detail window appears.
12. Click the hyperlink to the internal organization.
13. Select the new partner as the related organization.
14. Repeat the same steps used to create the organization-to-organization relationship for the internal organization to the partner.

For background description, go to Partner summary detail.

Viewing Partner Search Results

Search for an organization in order to view or to add Partner details.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner > Partner Summary Detail

Steps

1. To find information about an existing partner, in the Search field type the name of the organization you wish to see.
2. Click **Go**.

   The window returns the address and status of the Partner.
3. Drill down on the Name link to see details of the organization.

Creating/Viewing Partner Contacts

Use this window to perform the following tasks:

- View partner contact details
- Access the window for creating a partner contact
- Identify those who should receive collateral

For information on how to use the search capabilities, go to Quick Find.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Partner > Contact Summary > Contact Detail > Relationship Type

Steps

1. Select Predefined Views of Sales Partners and Exchange Partners.
2. View identifying information: address, phone number and email, start and end dates, title, role, manager, preferred language.
3. Select appropriate View By: All Partners, Sales Partners, or Exchange Partners.
4. To find more detailed information and to update information, drill down on a name.
5. To create a Partner Contact, click **Create**.

   The Create Partner Contact window appears. From this window you both create and remove partners.
6. Enter Partner information.

   Required fields of information include only the organization name. Other identifying fields are phone, email, business line, annual revenue, fiscal year, tax ID, DUNS number, total employees, year established, Web site, addresses.

   Partner Details requires only a start date. Optional information includes end date, the relationship type, partner level, purchase method, target revenue, channel manager, phone support person, original system reference, preferred VAD, revenue year to date.

   Person Relationships requires the name, phone number, and relationships type.
7. Click **Update** when you have finished making changes.

For background description, go to Partner Contact detail.

Creating Partner Contact Details

In this window create and maintain information about partner contacts. You must create a user registration for a Partner Contact who needs access to the Oracle Partner Relationship Management system.

For information on how to use the search capabilities, go to Quick Find.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Customer > Contact Summary > Relationship Detail > Relationship type: Employee of

Steps

1. Click **Employee** link in the summary table of Contacts.
2. Fill in appropriate information: names, title, relationship, role, manager, start and end dates, contact information.
3. In the Relationship Detail window, in the User Registration section: for the relationship type **Employee of**, select the User responsibility from the list of values: for example, select PV Partner.
4. Create a password for the User.
5. Verify the password by retyping it in the indicated field.
6. Supply the start and end dates (optional).
7. Click **Update**.

Guidelines

Vendor maintains this information for contacts so that they can enter the application. The partner cannot update this information.

For background description, go to Partner Contact detail.

Creating a New Opportunity

In this window you can create new opportunities, add vendor purchase items and partner solutions and services, add partner contacts, and write notes to describe the progress of the opportunity.

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Opportunity: Opportunities Summary

Steps

1. Click **Create**.
2. Indicate the customer: select the name from a list of customers or create a customer by clicking the **Create Customer** button.
3. Fill in the required information fields: identify the customer, address, and opportunity name.
4. Fill in other requested information, if known:
   - Select or create a project.
   - Indicate the sales stage, win probability, total budget, budget approval, close date, follow-up date, preferred partner, purchase time frame.
5. To add a vendor purchase item, indicate the product category from the list of values and the amount.
6. To add partner solutions and services, indicate the product category.
7. To add a partner contact, fill in the suggested information.
8. To add notes, select the type of notes from the list of values and indicate whether to make them **private**. Type in the notes.
9. Click **Create**.

For background description, go to Opportunities.

Creating/Viewing Opportunity Details

Use these links to go to Help for these topics.

- Creating Additional Opportunity Details
- Assigning a Sales Team, Adding/Removing a Salesperson
- Accepting/Declining Opportunity Assignment
- Viewing Active Opportunities Main Detail

Creating Additional Opportunity Details

Use this window to create additional opportunity detail. From this window, access and view the history of an opportunity and the Opportunity Matching window. From this window you can assign a sales team and add a salesperson.

For information on how to use the search capabilities, use Quick Find.

Log in as Assignment Manager and navigate to the following:

Opportunity > Main Summary

Steps

1. Click a specific Opportunity link.
2. Fill in additional appropriate information that was not included in the original opportunity creation.
3. To view the history of an opportunity, click **View History**.
4. To match the opportunity with partners, click **Match Opportunity**.
5. Accept or modify the matched partner list.
6. Decide the format for offering the opportunity: single, serial, multiple-parallel.
7. Decide whether to table the opportunity or to assign it.

For background description, go to Opportunities.

Assigning a Sales Team/Adding/Removing a Salesperson

Log in as Assignment Manager and navigate to the following:

Opportunity Summary > Opportunity Detail > Sales Team

Steps

1. Fill in details for the sales team members: sales group, salesperson, job title, role, full access, email, phone number.

   For information on how to use the search capabilities, use Quick Find.

2. From this window a salesperson can also be removed by clicking the checkbox preceding **Remove**.

For background description, go to Sales Team.

Matching and Assigning an Opportunity

Use these links to get Help for these topics.

- Opportunity Matching
- Assigning an Opportunity

Opportunity Matching

There are several ways to generate a partner list for opportunity matching. Use the appropriate general criteria selected at setup. Supplement those by manually creating and narrowing specific attributes and ranking them.

Log in as Assignment Manager and navigate to the following:

Opportunity >Main Summary

Steps

1. Click an unassigned opportunity.
2. Set up or select original criteria, for example, country, partner type, and level.
3. Click **Match Partner**.
4. View the automatching Partner list.
5. To refine the matching criteria, view the Assignment List routing.

   From this list you can override or adjust search criteria to find additional results based on manually selected criteria.
6. Access the Manual Matching window to search for specific attributes, for example, vendor certification or customer support capability.
7. To add partners to the matching list, whether they match the criteria list or not, click **Add to Partner Assignment List**.
8. At your discretion, change ranking manually.
9. When you have derived a satisfactory list, select the partner assignment method.

For background description, go to Opportunity Summary detail.

Viewing Overall Partner List

Log in as Assignment Manager and navigate to the following:

Opportunity > Main Summary Detail > Unassigned Opportunities

Viewing Manual Matching Results

In this window you can view and add matched Partners to your Manual partner list.

Log in as Assignment Manager and navigate to the following:

Opportunity > Main Summary Detail

Assigning an Opportunity

Log in as Assignment Manager and navigate to the following:

Opportunity > Main Summary

1. Click an unassigned Opportunity.
2. See the steps for creating additional opportunity detail.
3. When you have generated a list that satisfactorily matches partners with opportunities, select an assignment option.
4. Click **Assign** to offer the opportunity to a Channel Manager.

While an opportunity is being offered to Partners, the Assignment Manager can monitor the status of each opportunity as involved parties (AM, CM, Partner) shepherd them toward closure.

For background description, go to Opportunity: Partner Assignment.

Accepting/Declining Opportunity Assignment

For information on how to use the search capabilities, go to Quick Find.

Log in as Channel Manager and navigate to the following:

Opportunity Main Window

Steps

1. View the Opportunity Assignment table.

2. To view the history of an opportunity, click **View History**.
3. Drill down on links to view more specific opportunity details.
4. To accept, click **Accept**. The window refreshes and the opportunity becomes updatable.
5. Modify an opportunity assignment by changing partner name or ranking.
6. Click **Update** to save changes.
7. To reject an opportunity, click **Decline**.

For background description, go to Opportunity Summary detail.

Adding/Removing Opportunity Attributes

Log in as Assignment Manager, Channel Manager, or System Administrator and navigate to the following:

Opportunity Summary > Opportunity Detail > Classification

Steps

1. In the Attribute field select a general attribute from the LOV, for example, Functional Expertise, Partner type, Industries, Geographic Coverage.
2. Add more specific detail in the Description field.
3. Assign a value in the Value field from the LOV.
4. Click **Update** to save changes.

For background description, go to Opportunity Summary detail.

Selecting a Contact

Log in as Assignment Manager or Channel Manager and navigate to the following:

Opportunity > Opportunity Detail

Steps

1. In the Quick Find fields, select **Contact** from the LOV.
2. Leave the next field blank or type in the first letter of a contact if you know it.
3. Click **Go**.

4. Search Results appear.
5. Click the desired name.

   The name appears in the window for Partner and Opportunity Details details to be added.

For background description, go to Opportunity Summary detail.

Selecting Partner

Log in as Assignment Manager or Channel Manager and navigate to the following:

Opportunity > Opportunity Detail

Steps

1. In the Quick Find fields, select Partner from the LOV.
2. Leave the next field blank or type in the first letter of a Partner if you know it.
3. Click **Go**.

   Search Results appear.
4. Click the desire name.

   The name appears in the next window for Partner and Opportunity Details details to be added.

For background description, go to Opportunity Summary detail.

Setting Up Timeouts and Expiration Periods

Log in as System Administrator and navigate to the following:

Administration: Timeouts

Steps

1. Select the type of timeout view from the LOV: active, Channel Manager, Partner, stale period timeout.
2. Click **Apply**.
3. Set up expiration periods (optional).

   Currently, the application supports only Channel Manager and Partner timeouts.

Note: If a user functions as both assignment and Channel Manager, the timeout between executing those responsibilities is usually set at 0.

4. Click **Update**.

Guidelines

In setting timeouts, consider how efficiently a country can respond to an opportunity.

Set opportunities subject to timeouts to support a faster sales cycle.

Setting Up Status Codes and Transitions

Click here to set up status codes.

Click here to set up status transition.

Setting Up Status Codes

Log in as System Administrator and navigate to the following:

Administration > Status Codes: User Access Status

Steps

1. Select a View By User Type, for example, Assignment Manager, from the list of values.
2. Indicate which items of notification are to be sent to partners, the channel and assignments managers, the contact.
3. Indicate the last status and the new status.
4. Click **Update**.

Setting User Status Transition

Users change at successive stages as an opportunity progresses, and these changes are reflected in opportunity status.

Log in as System Administrator and navigate to the following:

Administration > Status Codes: User Access Status >Transition

Steps

1. When a user status transition occurs, indicate the opportunity status, for example, Active, Inactive, Lost, Matched, Offered, Won.
2. Click **Update**.

Guidelines

Changing user status from this administration window is easier than from the opportunity matching windows later in the matching process. At that time, if you have already offered an opportunity, the options freeze until the opportunity is accepted or declined. In addition, from this window, an LOV makes it easier to select and change status.

Setting Up Attributes

Attribute descriptions are used to identify partners in opportunity matching. Some of these attributes come with the application. You can create other attributes and rank them.

Log in as System Administrator and navigate to the following:

Administration > Attributes

Administration > Attributes > Attribute Details - Opportunity

Administration > Attributes > Attribute Details - Partner

Steps

1. Select the predetermined matching attributes where appropriate. These opportunity matching attributes include campaign code, country, customer support capability, geographic coverage.
2. At the partner level and the opportunity level, indicate whether the attribute is active.
3. In the attribute details window copy in the SQL text and LOV text from an existing attribute provided in the module in its drill down opportunities.

   For example:

   a. Copy the SQL text for the attribute type of **Solutions and Services**.

   b. Substitute the short name in the copied SQL text with the appropriate short name of the specific attribute.

For example, where you see **short name = ABC** in the SQL text passage, substitute **ABC** for the custom attribute value.

4. Click **Update**.

   See the *Oracle Partner Relationship Management Implementation Guide* for more details.

Setting Up Attribute Values

Define more specific identifying attributes to use in opportunity matching: for example, specify the dollar ranges for customer support capability.

Log in as System Administrator and navigate to the following:

Administration > Attribute Values

Steps

1. Select the general attribute from the LOV and click **Apply**.
2. Define values specifically by indicating quantities of money or employees.
3. Create other attributes, if needed.
4. Click **Update**.

Viewing Home

Use this page to view information your Partner posts here.

Log in as Partner and navigate to **Home** tab.

Viewing My Company Details

Use this page to see details of your partner's organization: annual revenue, total employees, business category, addresses and other identifying information.

For information on how to use the search capabilities, go to Quick Find.

Log in as Partner and navigate to the following:

My Company > **Organization**

To view more specific details about an organization or person, click the appropriate link.

Viewing Partner Organization Relationship Detail

Use this page to see the overall relationship details of the partner's organization and contacts:

- Related organizations and the types of relationships to them
- Start and end dates of relationship
- Person to organization relationships

To view details about a specific relationship, organization, or person, click the appropriate link.

For information on how to use the search capabilities, go to Quick Find.

Log in as Partner and navigate to the following:

My Company > **Organization** > **Relationships**

Viewing Partner Organization Notes

Use this window to review notes about Partner organizations and transactions regarding them. Sort them by type or view the entire note history.

Log in as Partner and navigate to the following:

My Company > **Organization** > **Notes**

Steps

1. Select the type of notes you wish to view from the list of values.
2. To display and review all notes, click **All Notes**.
3. To track notes for a period of time, in the Note History section select the type of note and indicate the date range.
4. Click **Apply**.

Viewing Customer Sales Team Detail

Use this window to review details of the Partner sales team: sales group, territory, job title, role, email and phone number. Click links to see more specific detail about the sales representatives.

For information on how to use the search capabilities, go to Quick Find.

Log in as Partner and navigate to the following:

My Company > **Organization** > **Sales Team**

Viewing Partner/Customer Interaction Detail

Use this window to review details of Partner/Customer interactions. Click links to see more detail about specific organizations, sales representatives, and interactions.

Log in as Partner and navigate to the following:

My Company > **Organization** > **Interactions**

My Company > **Person** > **Interactions**

Viewing Partner Contacts Summary

Use this window to review a summary list of Partner contacts. Click links to see more detail about specific sales representatives. Only the main business-related details are supplied.

Log in as Partner and navigate to the following:

My Company > **Person**

Viewing My Contacts

Use this window to view profiles of Partner contacts. Click links to see more detail about specific sales representatives. Only the main business-related details are supplied.

For information on how to use the search capabilities, go to Quick Find.

Log in as Partner and navigate to the following:

My Company > **Person** > **Person Detail**

Viewing My Contact Relationship Details

Use this window to view relationship details of Partner contacts. Click links to see more detail about specific organizations and about person-to-person relationships. Only the main business-related details are supplied, including start and end dates and first time user registration information. User registration login and password fields are updateable upon initial creation. Subsequent user login and password modifications have to be performed by a user on the vendor side.

For information on how to use the search capabilities, go to Quick Find.

Log in as Partner and navigate to the following:

My Company > **Person** > **Relationships**

Viewing Partner Contact Notes Details

Use this window to review notes about Partner Contact organizations and transactions regarding them. Sort them by type or view the entire note history.

Log in as Partner and navigate to the following:

My Company > **Person** > **Notes**

Steps

1. Select the type of notes you wish to view from the list of values.
2. To display and review all notes, click **All Notes**.
3. To track notes for a period of time, in the Note History section select the type of note and indicate the date range.
4. Click **Apply**.

Viewing Opportunities Summaries

Help is available for these topics.

- Viewing Offered Opportunities Summary
- Viewing Active Opportunities Summary

Viewing Offered Opportunities Summary

View a summary of information associated with offered opportunities. Topics include Company, Opportunity, Partner, Sales Stage, Win Probability, Close Date, Local Amount, and Deadline.

Log in as Partner and navigate to the following:

Opportunity

Steps

1. In the Opportunities **By Status** field, select **Offered**.
2. Click **Go**.
3. Click links to specific companies and to opportunity descriptions to see more detail.

Viewing Active Opportunities Summary

Use this window to review a summary of active opportunities.

Log in as Partner and navigate to the following:

Opportunity tab

Steps

1. Select **View By Active.**
2. Click **Go**.
3. Click links to companies and opportunity descriptions for more information.

Accepting/Declining an Offered Opportunity

Use this window to review details of the opportunity offered and to accept or decline the offer.

Log in as Partner and navigate to the following:

Opportunity >**View By Offered >Opportunity Summary** >**Opportunity Detail** > **Main**

Steps

1. View specific details associated with your offered opportunity: business overview of customer and Partner, project, total budget, win probability, vendor purchase items and amount, solutions and services.
2. Click **Accept** or **Decline**.

   The window changes status to Updatable if the offer is accepted.

Viewing Contacts for Offered Opportunities

Use this window to view Contacts for an offered opportunity. Click links to see more business details about contacts.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Detail > Contacts**

Viewing Offered Opportunities Notes

Use this window to review notes about offered opportunities. Sort them by type or view the entire note history.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Detail** > **Notes**

Steps

1. Select the type of notes you wish to view from the list of values.
2. To display and review all notes, click **All Notes**.
3. To review notes created during a specific period of time, in the Note History section select the type of note and indicate the date range.
4. Click **Apply**.

Viewing Offered Opportunities Sales Team

Use this window to review details of the sales team for the opportunity: sales group, job title, role, email and phone number.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Detail > Sales Team**

Viewing Active Opportunities Main Detail

Use this window to review the main opportunity detail: project name, total budget, industry, partner owner, sales stage, probability, follow up date, purchase time frame.

To view the history of the opportunity, click **View History**.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Detail >Main Detail**

Viewing Active Opportunities Contacts

Help is available for these topics.

- Viewing Active Opportunities Contacts
- Viewing Opportunity Contact Detail

Viewing Active Opportunities Contacts

Use this window to view Contacts for an active opportunity. Click links to see more details about contacts and their business relationships.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Detail > Contacts**

Viewing/Creating Opportunities Notes

Help is available for these topics.

- Viewing Active Opportunities Notes
- Viewing and Creating Opportunities Notes Detail

Viewing Active Opportunities Notes

Use this window to review notes about offered opportunities. Sort them by type or view the entire note history.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Summary** > **Opportunity Detail** > **Notes**

Steps

1. Select the type of notes you wish to view from the list of values.
2. To display and review all notes, click **All Notes**.
3. To review notes created during a specific period of time, in the Note History section select the type of note and indicate the date range.

4. Click **Apply**.

Viewing Opportunity Sales Team

Help is available for these topics:

- Viewing Active Opportunity Sales Team
- Viewing/Adding to Opportunity Sales Team Detail

Viewing Active Opportunity Sales Team

Use this window to review details of the sales team for the active opportunity: sales group, job title, role, email and phone number.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Summary** >**Opportunity Detail > Sales Team**

Viewing Active Opportunity Attributes

Use this window to review attributes of the active opportunity: for example, geographic coverage, vendor products, partner services and solutions, and marketing program.

Log in as Partner and navigate to the following:

Opportunity > **Opportunity Summary** >**Opportunity Detail**

Viewing Opportunity Contact Detail

Use this window to view details of opportunity Contacts: relationships, roles, and other contact information. Click links to see more details about contacts and their business relationships.

For background description, go to Opportunity: Contacts.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** > **Opportunity Detail > Contacts**

Viewing and Creating Opportunity Notes Detail

Use this window to create and review notes about opportunities. Sort them by type or view the entire note history.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** > **Opportunity Details > Notes**

Steps

1. Select the type of notes you wish to create from the list of values.
2. Type in the comments and descriptions of the opportunity.
3. To display and review all notes, click **All Notes**.
4. To review notes created during a specific period of time, in the Note History section select the type of note and indicate the date range.
5. Click **Update**.

For background description, go to Opportunity Summary detail.

Viewing/Adding to Opportunity Sales Team Detail

Use this window to review details of the sales team for an opportunity: sales group, job title, role, email and phone number, access. Add members to the team.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** > **Opportunity Detail > Sales Team**

Steps

1. To add a salesperson or a partner, select the name from the Find field and click **Go**.
2. Click links to the customer and the opportunity for more information.

For background description, go to Sales Team.

Viewing Opportunity Tasks Detail

Use this window to review tasks of the opportunity sales team. Create and assign tasks to sales team members.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** > **Opportunity Detail > Tasks**

Steps

1. View tasks by indicating a date range, priority, and status.
2. Create new tasks by clicking create and filling in the required information.
3. Click **Update** to save.

For background description, go to Opportunity Summary detail.

Creating Active Opportunity Attributes

Use this window to review attributes of an active opportunity: for example, geographic coverage, vendor products, partner services and solutions, marketing program, and others.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** >**Opportunity Detail > Classification**

Viewing Active Opportunity Competitors

Use this window to view competitors and their products. Add or remove competitors and update the records.

Log in as Assignment or Channel Manager or System Administrator and navigate to the following:

Opportunity > **Opportunity Summary** >**Opportunity Detail > Competitors**

Updating an Opportunity

After a Partner accepts an offered opportunity, the opportunity window is activated to enable the Partner to update and revise some details.

Prerequisites

Partner accepts an opportunity.

Log in as Partner Contact and update information where appropriate.

Steps

1. Fill in the project name.
2. Fill in the total budget.
3. Fill in vendor purchase items or supply new amounts for them where appropriate.
4. Adjust for partner solutions and services.
5. Click **Update.**

Adding User to Partner Sales Team

To access Partner windows, a user must be a sales team member. After an organization is newly created, if a user does not appear in the summary detail table on the Partner tab, add the user to the sales team to give access to the Partner information.

Log in as Assignment, Channel Manager, or System Administrator and navigate to the following:

Partner tab

Steps

1. Ensure that the profile **OS: Customer Access Privilege** is set to T (Sales Team).
2. Click the **Relationship** link to bring up the record that corresponds to the newly created organization.

   The Partner Profile window comes up.
3. Fill in Partner profile details: partner level, Channel Manager/Support Representative name, and other known information.
4. If appropriate to qualify the Partner as a sales/exchange partner, click the **Exchange Flag** checkbox.
5. Click **Update.**

Guidelines

If the responsibilities of Assignment Manager, Channel Manager, or System Administrator do not permit access for adding a user to a sales team, log in with global responsibilities at a higher level to place the sales representative on the sales team.