Oracle® Partner Relationship Management

Implementation Guide

Release 11*i*

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Oracle Partner Relationship Management Implementation Guide, Release 11*i*

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Contents

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Preface

This Implementation Guide provides information and instructions to help you implement Oracle Partner Relationship Management, Release 11*i*.

This preface explains how the guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide describes how to set up and configure Oracle Partner Relationship Management. The intended audience includes system administrators and Oracle implementation consultants. This is not meant to be a user's guide.

Related Documents

The following documents provide additional information on installing and implementing Oracle CRM products.

- *Installing Oracle Applications, Release 11i* (A87333-01)
- *Oracle Applications Concepts* (A82932-01)
- Oracle Applications *Product Update Notes, Release 11i* (A85297-01)
- Oracle Applications *System Administrator's Guide* (A75396-04)
- Oracle Applications *User's Guide* (A75394-03)
- *Implementing CRM Applications* (A85301-01)
- *Implementing Oracle HRMS* (A73313-01)
- Oracle CRM Foundation *Implementation Guide* (A86122-01)

- Oracle CRM Foundation *Technical Reference Manual (A86150-01)*
- Oracle Sales Compensation *Implementation Guide (A87371-01)*
- Oracle Sales Online *Implementation Guide* (A87352-01)
- Oracle Sales Online *Technical Reference Manual (A86175-01)*

Implementing Oracle Partner Relationship Management

Overview of Oracle Partner Relationship Management

Partners are entities that assist in the selling process by providing industry expertise or by adding value to the products and services. Types of partners include strategic business alliances, indirect channels, value-added resellers, and value-added distributors.

Oracle Partner Relationship Management focuses on connecting vendors with the indirect channels to meet the customers' purchasing needs.

Functionality

Customer and Contact Management

Oracle Partner Relationship Management provides representatives with a complete customer overview at each stage of the sales process in both Business to Business and Business to Customer environments. Before contacting a customer, a sales representative can review customer information such as products installed, outstanding service requests, payment history, key contacts, open opportunities, and specific sales team members assigned to the customer account. Comprehensive customer information allows sales representatives to better manage their customer accounts and to plan each customer interaction more efficiently.

Opportunity Management

Opportunity Management enables you to track opportunities as they progress from generation through partner matching, partner assignment, partner review and processing. Opportunity management lets you:

- capture leads from various channels (fax, Web, e-mail, messages, phone) as they are created in Oracle TeleSales or Sales Online, or as they are imported into Oracle TeleSales and changed into indirect opportunities.
- apply user-defined business rules to route opportunities to appropriate sales team members such as assignment managers.
- apply user-defined business attributes to match opportunities automatically and manually.

Task Management

The user can create tasks related to organizations, people and/or opportunities and assign them to themselves or to other team members. Tasks are organized in a list view that can be sorted by priority, status, due date.

Interaction History

Oracle Partner Relationship Management users have visibility into all customer touch points through interaction with the Oracle E-Business suite of applications and can view interactions performed by other system and or individuals.

Personalization

Sales professionals can personalize the application through an intuitive profile screen. The user can customize the home page to display relevant information such as news and important sales metrics. The user can customize various table views and choose display and sorting options. Additionally, the user can select the language, currency, date formats and other display options through the same profile screens. Frequently used queries can also be easily set up and saved for future use.

Forecasting

Oracle Partner Relationship Management consolidates divisional forecasts with multiple currencies to provide sales executives on the vendor side a more extensive, global view of their company revenue forecasts. Senior executives are able to view global roll-ups of sales forecasts across geographic regions, currencies, sales organizations, and product lines. Oracle Partner Relationship Management also allows sales executives to drill down from a global forecast to the detail level of deals and opportunities in the local currency.

Collateral Fulfillment

Through integration with the Oracle CRM Foundation One-to-One Fulfillment module, users can send collateral to their contacts and/or prospects. Using a wizard, users walk through a series of steps to complete their fulfillment requests.

Oracle Sales Compensation

Integration with Oracle Sales Compensation allows for consistent compensation rules and performance (quota) metrics. Integration will provide the capability to

- calculate vendor agents' or partner agents' compensation at the aggregate and opportunity levels
- map performance quotas to compensation plans

Marketing Encyclopedia Integration

Through integration with the Oracle Marketing Encyclopedia System, sales and marketing professionals can organize corporate information into categories and channels for use. Marketing Encyclopedia System users can set up groups to swiftly publish content to the appropriate users.

Resource Manager

Resource Manager provides the capability for sales managers to easily add and update sales agent and partner profiles. It enables the manager to

- import sales group hierarchy from Oracle Human Resources on the vendor side
- create and maintain agent and group profiles for the vendor or partner

Territory Manager

Territory Manager will assist the sales and assignment managers to easily define territory groups and assign resources to the territory. Territory manager will provide the capability to

- administer assignment manager territories and accounts
- view the hierarchy of territory groups, territories, the people associated with them, and their accounts

Partner Profile Management

Partner profile management will provide details about the partner such as

- specific partner solutions and services, preferred value added distributor

- target revenue and revenue to date
- associated contacts such as channel manager and phone support person
- partner contacts and user registration

Further, the product will support partner administration set-up of:

- partner attributes
- routing and response timeouts, and
- valid status codes

Partner Matching

Oracle Partner Relationship Management allows flexible matching of partner criteria to the opportunities. Ranking is associated with how well the partner candidates match the specific opportunity. Specific abilities include:

- ability to match partners automatically according to common attributes: geographic coverage, industry vertical, vendor products, vendor certification, partner services and solutions, and campaign codes.
- ability to match partners automatically according to vendor defined attributes.
- manual application of business attributes, such as partner name, customer support capability, partner activity, and partner type, to match partners
- initial ranking that is assigned, but channel managers can adjust the rankings of their partner on a specific opportunity
- user defined maximum number of partners returned in matching results
- user defined ranking of search criteria which drops the lowest search criteria value until match results are found

Partner Assignment

Partner Assignment will allow the channel managers to approve the assigned opportunities to the partners within their territory. Various abilities related to the assignment process include:

- channel manager review of the assigned opportunities
- update capabilities to approve assignment, reject assignment, and modify assigned partner
- various assignment options: single, serial and broadcast

- single assignment that restricts the match to only one partner
- serial assignment that sends the opportunity to the partners ranked highest to lowest, until an assigned partner accepts the opportunity
- broadcast assignment that sends the opportunity alert to all the channel managers, and offers the opportunity to all the assigned partners simultaneously after the channel managers have approved the opportunities

Partner Review and Processing

Partner review and processing allows the partners to assess and progress the opportunities if appropriate. If the opportunity is not well suited to the partner's industry expertise, he can reject the opportunity, and make it available to another partner. Additional features associated with the partner review and processing:

- accept and update the opportunity
- decline the offered opportunity

Workflow and E-mail Alerts

Through Oracle 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. Workflow features and e-mail alerts include:

- automatic e-mail alerts to notify of matched partners and offered opportunities
- automatic sending of the opportunity to the assigned partner if the channel manager's timeout period has expired to process the opportunity
- automatic routing of opportunities to assigned partners for the various assignment options; single, serial, and broadcast
- automatic opportunity status updates after certain events have occurred

Application Architecture

The application architecture for Oracle Partner Relationship Management is as follows:

Technology Stack

- Oracle Forms Designer, version 6.0.8.8.0
- Oracle 8 Enterprise Edition Release, version 8.1.6

- Oracle Reports Designer, version 6.0.8.8.3
- Oracle WebDB, version 2.2.2.1
- Apache version, version 1.3.9
- Java Developer Kit Server Side, version 1.1.6

Dependencies

Oracle Partner Relationship Management requires the following related products and components to be installed and implemented:

- Oracle CRM Foundation Components (Resource Manager, Interaction History, Notes Manager, Tasks Manager, Territory manager, One-to-one Fulfillment, Marketing Encyclopedia)
- Oracle Sales
- Oracle Sales Online

Other Related Products and Components

- Oracle ERP applications (HRMS, Inventory, Order Management, Accounts Receivable)
- Oracle Marketing Online
- Oracle Sales Compensation
- Oracle Sales Online
- Oracle Service
- Oracle TeleSales

Setting Up Oracle Partner Relationship Management

Overview

The following sections of this document describe the steps necessary to implement Oracle Partner Relationship Management.

Implementation Steps

The table below summarizes the necessary steps to successfully implement Oracle Partner Relationship Management. Further information detailing the implementation procedures is provided in the sections following the table.

Prerequisites

1. Verify that Oracle e-Business Suite Enterprise database has been properly installed. Refer to Oracle e-Business suite documentation if this has not been completed.
2. Verify that Oracle Partner Relationship Management 11*i* has been properly installed.
3. Complete installation and implementation steps as outlined in the following documents:

- Oracle Applications *System Administrator's Guide* (A75396-01)
- *Implementing CRM Applications, Release 11i* (A85301-01)

Steps

Mandatory	Step Number	Oracle Partner Relationship Management Implementation Steps
❏ Yes	❏ Step 1	Create Role
❏ Yes	❏ Step 2	Create Groups
❏ Yes	❏ Step 3	Create Employee Reference: *Implementing Oracle HRMS* (A73313-01)
❏ Yes	❏ Step 4	Create User Details
❏ Yes	❏ Step 5	Assign Resource, Role, and Role Group
❏ Yes	❏ Step 6	Set up Profiles
❏ Optional	❏ Step 7	Set up Access to Oracle Partner Relationship Management
❏ Yes	❏ Step 8	Set up Partner Administration
❏ Yes	❏ Step 9	Set up Status Codes: Partner Administration
❏ Yes	❏ Step 10	Set up Attributes: Partner Administration
❏ Yes	❏ Step 11	Run Concurrent Programs

Mandatory	Step Number	Oracle Partner Relationship Management Implementation Steps
❏ Yes	❏ Step 12	Create the Custom Attribute at the Partner Level
❏ Yes	❏ Step 13	Set System Profiles
❏ Yes	❏ Step 14	See Oracle Sales Online *Implementation Guide*, Release 11i (A87352-01): Step 4, Create Locations Step 5, Setup Opportunity and Forecasting Step 8, Setup Note Types and Map to Source Step 9, Set up Territory Management Step 10, Set up Task Manager Step 11, Set up Interaction History Step 12, Set up Marketing Encyclopedia Step 13, Set up Marketing Campaigns Step 14, Set up Fulfillment Step 15, Set up Opportunity Exchange

Create Role

Oracle Partner Relationship Management automatically assigns new partners to Sales Representative and Sales Manager roles. These roles are already created in the application. A role that must be created upon implementation enables the Compensation tab if the customer has installed Oracle Sales Compensation (OSC).

1. Log in as **sysadmin** with password **sysadmin** and responsibility of **CRM Resource Manager.**
2. Choose **Navigator > Set up > Role.**
3. Enter a name for the role, for example, PRM Sales Compensation Manager.
4. Choose the Type Value = Sales Compensation.
5. Click **Save**.

Create Groups

Upon implementation, the Oracle Partner Relationship Management module accommodates two types of groups. An unlimited number of manually created groups can be added to reflect the user's business. However, only one group needs to be manually created to link to the Compensation role created earlier. A second type of group is automatically created when a new partner is created.

Steps

1. Log in as **sysadmin** with password **sysadmin** and responsibility of **CRM Resource Manager**.
2. Choose **Navigator > Maintain Resources > Groups**.
3. Assign a value for Name, for example, **Partner Tennis Group.** This made-up group name simply associates a resource and role.
4. If there is a parent company, associate it with the current group by selecting the company's group name in the Relations tab.
5. In the Usages tab, select Oracle Partner Relationship Management.
6. Save the group.

Guideline

This process occurs only within the Partner tab, not within the Customer tab.

Create Employee

Steps

Follow the employee setup steps in *Implementing Oracle HRMS* (A73313-01).

Remember to enter the user's email address for later use in Oracle Partner Relationship Management workflow notification.

Create User Details

Use this procedure to create the person's user login name and password. From this screen the user can also assign one or more responsibilities, such as Assignment Manager.

Prerequisites

One user defined Sales Compensation role and one user defined role group are set up before a resource is assigned to a user responsibility.

User has System Administrator responsibilities. Switch responsibilities from US HRMS Manager to System Administrator, if necessary.

Steps

1. Choose **File > Switch Responsibility**. Enter **System Administrator**.
2. Select **Security > Users > Define.**
3. Enter a User name, for example, a value such as **SGRAF**.
4. Create and enter a password.
5. To validate the password, enter the password value, save, enter the password a second time in the same field and resave.

   Another way to save the password is to type in the password, tab out of the password field, replace the cursor in the password field, and reenter the password.

   The field color turns white.
6. Select the desired existing employee from the list of values.
7. Assign the user the appropriate Partner Online responsibilities. Use these codes:
   - LAM = Assignment Manager
   - CM= Channel Manager
8. Save the user login details.

Assign Resource, Role, and Role Group

Use this procedure to assign the specific user's role and role groups. After the person, known as a resource, has been imported, the Resource Manager can assign the person the sales representative and sales compensation roles. This allows the person to access Oracle Partner Relationship Management functionality and Oracle Sales Compensation functionality in the Compensation tab.

Prerequisites

User has CRM Resource Manager responsibilities.

Steps

1. If user does not have CRM Resource Manager responsibilities, switch user responsibility from System Administrator to CRM Resource Manager. Choose **File > Switch Responsibility**. Enter **CRM Resource Manage**r.
2. Choose **Navigator > Maintain Resource > Import Resource.**

3. Search for the user. Fill in the values for the search criteria:
   - Resource Category = Employee
   - Name = name of relevant user created in HRMS
   - Click the Search button
   - Click the checkbox next to the correct user in the search results
4. Click **Create Resource**.
5. Select the desired resource details:
   - Role of Sales Representative
   - Start Date = user defined
   - End Date = user defined (optional)
6. Click **Details**. This resource details screen should now have all the information entered earlier about the user/resource.
7. Click the **Groups** tab. Select the first row, and in the first column select the relevant partner group from the list of values, for example, **Partner Tennis Group.** With the first row still highlighted, place your cursor in the second column, second row, and choose the group member role (that should be the one you selected for the user earlier, for example, Sales Compensation Manager).
8. Save the resource details.

Set Up Profiles

This table lists and describes Profile options and indicates the profile levels specifically for Oracle Partner Relationship Management. These profile setups are performed in addition to the Oracle Sales Online profile setup steps.

Profile level symbols* indicate:

- S = Site
- A = Application
- R = Responsibility
- U = User

Functional Area	Profile name	Profile levels*	Profile Description	Default Value
Opportunity	PV: Default Opportunity Status	SU	Used to specify default opportunity status that will be in the opportunity summary screen. For the following Assignment Manager the opportunity status is unassigned, for Channel Manager it is Matched, and for Partner it is Offered. This setup is required for PRM use above that for OSO use.	
Opportunity Assignment	PV: Default CM timeout period in hours	S	Timeout value to use if there is no timeout value set for channel manager's country (OSO: Default Country)	0
Opportunity Assignment	PV: Default Partner timeout in hours	S	Timeout value to use if there is no timeout value set for partner's country (OSO: Default Country)	24
Opportunity Assignment	PV: Default Group	U	If user belongs to multiple group, this profile is used to determine the default group	
Opportunity Assignment	OSO: Default Country	SARU	Used to determine timeout values for both channel managers and partners. This is a required Oracle Partner Relationship Management setup step in addition to any required OSO step.	United States
Opportunity Matching	PV: Top N Match Partners	SARU	Maximum number of partners returned in matching	10
Partner Management	PV: Default Vendor Organization	SARU	Vendor used when establishing partner relationships	
Access	PV: User Types	SU	This user type defines what type of matching each of the users is allowed. For instance, Assignment Manager is allowed global matching, Channel Manager is allowed matching with only his partners. Sales representative and users cannot perform matching.	Sales Rep
Access	JTF_PROFILE_DEFAULT_ APPLICATION	SARU	Default application id of user. For PRM, it is 691.	

Access	JTF_PROFILE_DEFAULT_ RESPONSIBILITY	SARU	Default responsibility id of user for the application: LAM or assignment manager - 21865 CM or channel manager - 21864 PV PARTNER USER or partner user – 22483

Use this procedure to set up your default values for your profiles. These steps control default variables set at the site level and user level.

Prerequisites

User has System Administrator responsibilities.

Steps

Site Level

To set profile defaults at the site level, for example, for timeout periods, follow these instructions. Note: Timeout represents time duration in which an action is expected to take place.

1. Choose **Profile > System**.
2. Enter in the Profile field, **PV%**.
3. Click **Find** and fill in the following default profile values at the site level:
   - PV: Default CM timeout in hours = 0
   - OSO: Default Country = desired country
   - PV: Default Partner Timeout in Hours = desired timeout period such as **24**
   - PV: Default Vendor Organization = desired internal organization at site or user level
   - PV: Top N Match Partner = desired maximum number of automatic partner matching results such as **10**
   - PV: User Types = Sales Representative

User Level

1. If user does not have system administrator responsibilities, switch **from CRM Resource Manager** to System Administrator responsibilities. Choose **File > Switch Responsibility**. Enter **System Administrator**.
2. Choose **Profile > System**.
3. Check off Site, User, and Profile with No Values.
4. Enter the user login you created earlier, for example, **SGRAF**, and tab out of the field.
5. In the Profile field, enter **JTF%PROFILE%**.
6. Click Find.
7. In the User column for the JTF_Profile_Default_Application, enter the Partners Relationship Management application ID, **691**.
8. In the user column for the JTF_Profile_Default_Responsibility, enter the relevant default responsibility ID:
   - LAM or Assignment Manager = 21865
   - CM or Channel Manager = 21864
   - PV PARTNER USER or Partner User = 22483
   - Sales Representative =
   - System Administrator = 22412

   You can do this on the profile page.

For other profile defaults, such as language, currency, and site, you can change the default IDs or accept the provided settings.

9. To set other profile defaults at the user level, choose **Profile > System**.
10. Check off Site, User, and Profile with No Values.
11. Enter the user login you created earlier, for example, **SGRAF,** and tab out of the field.
12. In the Profile field, enter **PV%**.
13. Enter default values for:
    - PV: Default Opportunity Status = desired opportunity default for Opportunity Summary screen

- PV: Default Group
- PV: Default Vendor Organization
- PV: User Types = Sales Representative, Assignment, Channel Manager, and Partner User. For example, the Assignment Manager can perform the global partner matching. Channel Manager can do matching only for their partners.

14. To set other profile defaults at the user level, choose **Profile > System**.
15. Check off Site, User, and Profile with No Values.
16. Enter the user login you created earlier, for example, **SGRAF,** and tab out of the field.
17. In the Profile field, enter **OSO%**.
18. Enter default value for
    - OSO: Default Country = desired country

Set Up Access to Oracle Partners Online

Use this procedure to allow existing users from other modules to access Oracle Partners Online. Set up, for example, an Oracle Sales Online user with a Oracle Partner Relationship Management responsibility and follow the same profile setup steps mentioned earlier at the user level.

Set Up Partner Administration

Oracle Partner Relationship Management provides certain seeded values upon installation: attribute values, timeout defaults, opportunity statuses. After an Oracle Partner Relationship Management sysadmin user has been created and assigned responsibilities, the user can use the Administration tab to add new data, set up timeout defaults, attribute codes, attribute display characteristics and perform relevant administrative tasks from the html user interface side.

Set Up Timeouts

Guidelines

Set up Timeouts by country and period (in hours). Timeouts represent time durations in which an action is expected to take place. The setup screen allows timeout periods to vary for different countries.

The unit of measure is in hours, not days.

Stale timeout period is currently not supported. If only one timeout period is used across sites, the default timeout period can be set up in the html user interface Profile screen.

- Channel Manager Timeout limits the time period a channel manager can have the untouched offered opportunity before it is forwarded to the assigned partner. If the Channel Manager does not process the opportunity, the opportunity is forwarded automatically to the partner.
- Partner Timeout limits the time period a partner has to respond to an offered opportunity before it is recycled or offered to another partner

Set Up Status Codes

Set Up Status Codes: View By

The valid statuses that are applicable to other Sales applications include New, Preliminary, On-Hold, Won, Lost, Inactive. The valid statuses specific to Oracle Partner Relationship Management include Active, Unassigned, Matched, Offered, and Recycled. The timeout periods make sense only for those values from **matched** to **offered**, and from **offered** to **active** for all four of the following user types.

- Assignment Manager
- Channel Manager
- Sales Representative
- Partner User

Set Up Status Codes: Transition

This screen defines several concepts at the site level for the four user types: Assignment Manager, Channel Manager, Sales Representative, and Partner User.

- Status From and Status To columns define the sequence of possible opportunity status values: for example, the opportunity status **Active** can be changed to **Inactive**.
- LOV flag defines whether the value is displayed as part of the list of values.
- Inactive flag invalidates the opportunity status.
- Notify Partner, Notify CM, Notify AM, and Notify Secondary Support designate which user types receive e-mail notifications when the particular opportunity status changes to another status.
- Timeout notify flag notifies other selected user types when one of the two timeouts, **matched** and **offered**, have occurred.

Set Up Attributes Types

Oracle Partner Relationship Management provides common attributes that can be used to describe partner profile information and opportunities that are used during the partner matching process. The screens are accessed through the attribute link on the partner summary screen.

Common attributes provided in the Oracle Partner Relationship Management module include Country, Capacity Rating, Functional Expertise, Geographic Coverage, Industry, Vendor products and purchases, Vendor certification, Partner Services & Solutions, and Marketing Programs.

Guidelines

This task can be performed at any time.

Steps

From the main Attribute screen:

1. For certain attribute types the values need to be entered into the Administration tab. Then the values can be used and accessed from drop-down boxes when necessary for updating the specific partner or opportunity.
2. This Attributes screen is also used to create **custom attributes**.
3. The attributes **Country, Vendor Products and Purchases**, and **Marketing Program** pull values from other CRM or ERP tables that are entered in places other than the Administration tab upon creation of a customer, item details, and marketing campaign details.

In the Administrative tab, for instance, the **Partner Solutions and Services** attribute type has values of **Hardware** and **Software** and **Consulting** that appear when you are updating partner data, such as for Mindline Software. At the transactional level, we describe the partner of attribute type **Solutions and Services** with the value **Consulting**.

4. Automatic Matching Rank: the ranking of each attribute for automatic matching. The lower the rank number, the greater the ranking value. For instance, "1" weighs more heavily than "5". Also, when automatic or manual matching occurs, the system automatically drops the lower ranking criteria if the search cannot find results based upon the original criteria.
5. Manual Matching Rank: this ranking works in a similar way to the automatic matching, except that you can define other values to be applied for the manual search for partners.
6. Two screens are used to create details for each attribute: Opportunity attributes, and Partner attributes.

Steps

From the Attribute drill-down screen with menu choices, **Opportunity and Partner**:

1. To further define the behavior of the attributes, drill down on one of the attribute types in the table, such as **Solutions and Services**.
2. For the opportunity at the partner level, check off **enable, display, part of automatic assignment**, and you can select **item style drop-down.**

   Enter:

   - Data Source = External if the field is from a CRM ror ERP table
   - Data Source = Internal if the field is new
3. Copy the SQL text and LOV text from an existing attribute provided in the module in its drill down opportunities. For example, copy the SQL text for the attribute type of **Solutions and Services**.
4. 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 **AB**C for the custom attribute value.
5. Add the correct source table and source column for the new attribute.
6. To complete the creation of the custom attribute, run the concurrent program, **PV Refresh Attribute Text Table**. See Run Concurrent Programs.

Set Up Codes for the Attribute Values

1. Select the particular attribute type from the list of values.
2. Define the attribute codes, such as **Hardware**, **Software**, **Consulting**, for the attributes, such as **Partner Solutions and Services**.
3. Check the box in the specific row to enable it for automatic matching.

Run Concurrent Programs

Refer to the Oracle Applications *System Administrator's Guide* (A75396-04).

Guidelines

- Run Territory Manager to identify the Assignment Manager's territory.
- Run the two Oracle Partner Relationship Management Concurrent Programs:
  - PV Refresh Attribute Text Table: This program allows the attribute details for a particular partner to be used in the matching process.
  - Workflow Background Process: This program needs to be scheduled to enable the timeout processing.