Oracle® Partners Online

Implementation Guide

Release 11*i*

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Part No. A87514-04

Oracle Partners Online (POL) is also known as Oracle Partners Online (PRM). Throughout this guide the application is referred to as ***Oracle Partners Online***.

This Implementation Guide provides the necessary instruction to help you implement Oracle Partners Online.

Intended Audience

This guide describes how to set up and configure Oracle Partners Online. The intended audience includes System Administrators and Oracle Implementation Consultants. This is not meant to be a user's guide.

Related Documentation and Resources

The following documents provide additional information on installing and implementing Oracle CRM 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, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

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.

Overview of Oracle Partners Online

Partners are entities that assist in the selling process by providing industry expertise or by adding value to the products and services. Different types of partners include:

- ***Strategic Business Alliances***
- ***Indirect Channels***
- ***Value-Added Resellers***
- ***Value-Added Distributors***

Oracle Partners Online focuses on connecting vendors with the indirect channels to meet the customers' purchasing needs.

Functionality

Customer and Contact Management

Oracle Partners Online 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 opportunities to be tracked as they progress from generation through partner matching, partner assignment, partner review and processing.

Opportunity Management users can:

- Capture leads from various channels (fax, Web, email, phone) as they are created in Oracle TeleSales or Oracle Sales Online, or as they are imported 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, and due date.

Interaction History

Oracle Partners Online 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 window. 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 windows. Frequently used queries can also be easily set up and saved for future use.

Forecasting

Oracle Partners Online consolidates divisional forecasts with multiple currencies to provide sales executives on the vendor side a more extensive, global view of their company revenue forecasts. Sales executives can drill down from a global forecast to the detail level of deals and opportunities in the local currency.

Senior executives are able to view global roll-ups of sales forecasts across geographic regions, currencies, sales organizations, and product lines.

Collateral Fulfillment

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

Oracle Sales Compensation

Integration with Oracle Sales Compensation allows for consistent compensation rules and performance (quota) metrics. Integration provides the means to calculate compensation for vendor agents and partner agents at the aggregate and opportunity levels. Oracle Sales Compensation enables the mapping of 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. Resource Manager enables the user to import the 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.

Territory Manager

Territory Manager allows the sales and assignment managers to easily define territory groups and assign resources to the territory. Territory manager provides the means to administer assignment manager territories and accounts and to view the hierarchy of territory groups, territories, the people associated with them, and their accounts.

Partner Profile Management

Partner profile management provides details about the partner such as:

- Specific partner solutions and services and the preferred value added distributor
- Target revenue and revenue to date
- Associated contacts such as the Channel Manager and secondary support person
- Partner contacts and user registration.

Further, the product supports partner administration setup of Partner attributes, routing and response timeouts, and valid status codes.

Partner Matching

Oracle Partners Online allows flexible matching of partner criteria to the opportunities. Ranking is associated with how well a partner candidate matches a specific opportunity. Specific capabilities enable the processes of partner matching:

- Automatically, according to common attributes: geographic coverage, industry vertical, vendor products, vendor certification, partner services and solutions, and campaign codes.
- Automatically, according to vendor-defined attributes.

- Manually, through application of business attributes, such as partner name, customer support capability, partner activity, and partner type.
- Initial ranking that is assigned, but Channel Managers can adjust the rankings of their partner on a specific opportunity.
- Defining maximum number of partners to be 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 allows Channel Managers to approve the assigned opportunities to the partners within their territory. Various capabilities related to the assignment process include:

- Channel Manager review of the assigned opportunities.
- Updating to approve or reject an assignment and to modify an assigned partner.
- Various assignment options:
    - Single assignment routing, which restricts the match to only one partner.
    - Serial assignment routing, which sends the opportunity successively to the partners ranked highest to lowest, until an assigned partner accepts the opportunity.
    - Broadcast assignment routing, which sends the opportunity alert to all Channel Managers and offers the opportunity to all 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. The partner can reject the opportunity and make it available to another partner.

Additional features associated with partner review and processing are the means to accept and update the opportunity, or to decline the offered opportunity.

Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases the vendor and partner efficiency by automatically updating opportunity statuses and automatically routing opportunities to and from various parties. Workflow features and email alerts include:

- Automatic notification of matched partners and offered opportunities.
- Automatic sending of the opportunity to the assigned partner if the Channel Manager's time-out period for processing the opportunity has expired.
- Automatic routing of opportunities to assigned partners for the various assignment options: single, serial, and broadcast.
- Automatic opportunity status updates after designated events have occurred.

Application Architecture

The application architecture for Oracle Partners Online is as follows:

Technology Stack

- Oracle Forms Designer, version 6.0.8.10.3
- 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 1.1.8

Integration Points

Oracle Partners Online builds on and shares the functionality of the following related products and components, and requires them to be implemented.

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

Oracle Sales Online

Other Related Products and Components

Oracle Partners Online builds on and shares the functionality of the following related products and components.

- Oracle ERP applications (HRMS, Inventory, Order Management, Accounts Receivable)
- Oracle Marketing Online
- Oracle Sales Compensation
- Oracle TeleSales
- ***The following table shows the access of tabs by the user's responsibility.***

Tab Access by User Responsibility

TAB MATRIX **ACCESS**

Tab Name	Vendor User			Partner User
	System Admin.	Assignment Manager	Channel Manager	Partner Contact / User
Home	Y	Y	Y	N
Activity	Y	Y	Y	Y
Opportunity: differs by user	Y / with matching	Y / with matching	Y	Partial
Customer	Y	Y	Y	N
Partner	Y	Y	Y	Y
My Partner	Y	Y	N	Y
Compensation	Y	Y	Y	Y
Fulfillment	Y	Y	Y	N
Encyclopedia	Y	Y	Y	Y
Administration	Y	N	N	N

Tracking Opportunity Flow and Status

	OPPORTUNITY FLOW					
Steps 1-6	**1. Create Opportunity**	**2. Match Opportunity with Partner**	**3. Assign Opportunity to Partner(s)**	**4.Channel Manager Reviews Assignment**	**5.Partner Accepts/ Declines Opportunity**	**6.Process Partner**
Step 1-6 Descriptions	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 time-out 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
Status of the Opportunity during step	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 on the Opportunity Main Details 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 an offer is declined and it is a single offer, Workflow automatically routes it to the Channel Manager with recycled status.
- If an offer is declined and it is a serial offer, Workflow automatically routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner, at which point, it gets recycled.

Setting Up Oracle Partners Online

Overview

The following sections of this document describe the steps necessary to implement Oracle Partners Online.

Implementation Steps

The table below summarizes the steps necessary to successfully implement Oracle Partners Online. Further details of the implementation procedures are 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 Partners Online 11*i* has been properly installed.
3. Complete installation and implementation steps as outlined in the following documents:

- ***Oracle Applications System Administrator's Guide***
- ***Implementing CRM Applications, Release 11i***

Steps

Mandatory	Steps	Oracle Partners Online Implementation Steps
Yes	Step 1	Create Role
Yes	Step 2	Create Groups

Mandatory	Steps	Oracle Partners Online Implementation Steps
Yes	Step 3	Create Employee Reference: ***Implementing Oracle HRMS***
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
Yes	Step 8	Set up Time-outs: Partner Administration
Yes	Step 9	Set up Status Codes: Partner Administration
Yes	Step 10	Set up Attributes Types: Partner Administration
Yes	Step 11	Set up Attribute Values: Partner Administration
Yes	Step 12	Set up profiles in Oracle Sales Online. See *Oracle Sales Online Implementation Guide, Release 11i.* Create Locations Setup Opportunity and Forecasting Setup Note Types and Map to Source Setup Territory Management Setup Task Manager Setup Interaction History Setup Marketing Encyclopedia Setup Marketing Campaigns Setup Fulfillment Setup Opportunity Exchange
Yes	Step 13	Run Concurrent Programs

Step 1: Create Role

Oracle Partners Online 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.
6. Close the form.

Step 2: Create Group

Upon implementation, the Oracle Partners Online 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 related 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 Partners Online.
6. Save the group.
7. Close the form.

Guideline

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

Step 3: Create Employee

Steps

1. Follow the employee setup steps in ***Implementing Oracle HRMS.***
2. Enter the Employee's email address for later use in Oracle Partners Online workflow notification.

Step 4: Create User Details

Use this procedure to

- Create the newly created employee’s login name and password.
- Assign one or more responsibility types, 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.

Log in with System Administrator responsibilities.

Steps

1. Choose File > Switch Responsibility.
2. Enter System Administrator.
3. Select **Security > Users > Define**.
4. In the Person field, enter a user name for the newly created employee, for example, a value such as SGRAF, composed of an initial and a surname.
5. Create and enter a password.
6. To validate the password, enter the password value, save, enter the password a second time in the same field and resave.

   Alternately, enter the password, tab out of the password field, replace the cursor in the password field, and reenter the password.

   The field color turns white.
7. Select the existing employee from the list of values. Narrow the selection by typing in the first initial of the last name.

   The search through the database for the newly created employee may take some time.

   If the employee has been created, the name will in the list of values.
8. Assign the new user the appropriate Oracle Partners Online responsibilities. Use these codes:
   - **LAM** = Assignment Manager
   - **CM** = Channel Manager
9. Save the user login details.

Step 5: 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 Partners Online

functionality and Oracle Sales Compensation functionality in the Compensation tab.

Prerequisites

Log in with CRM Resource Manager responsibilities.

Steps

1. Choose File > Switch Responsibility.
2. Enter CRM Resource Manager.
3. Choose **Navigator > Maintain Resource > Import Resource**.
4. Search for the newly created employee.
   a. Fill in the values for the search criteria:
      * Resource Category = Employee
      * Name = name of relevant user created in HRMS
   b. Click Search.
   c. Click the checkbox next to the target user in the search results.
5. Click Create Resource.

   A Default Values Window appears.
6. Select the desired resource details:
   - Role of Sales Representative
   - Start Date = user-defined
   - End Date = user-defined (optional)
   - Role Start Date = user-defined (optional)
   - Role End Date = user-defined
7. Click OK.

   A Selected Resources window appears. This Resource details window should now have all the information entered earlier about the user/resource.
8. Click Save Resource.

9. Click the Groups tab.
10. Select (highlight) the first row.
11. In the first column of the first row select the relevant partner group from the list of values, for example, Partner Tennis Group.
12. With the first row still highlighted, place the 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).
13. From the File menu, save the Resource details.

Step 6: Set Up Profiles

The following table describes profile options and indicates the profile levels for Oracle Partners Online. Oracle applications allow the user to set the profiles, according to your company's business requirements. "Responsibilities" and "Profiles" provide the user with access to the system.
Responsibilities define the tabs, subtabs and links the user has access to.
Profiles define more detailed access rights, such as: giving the user display / update access to a particular section, field or checkbox.

Profile options can be set at four different levels:
1. Site: Indicates that the profile option is set at the site level. The site level setting affects the entire database.
2. Application: Indicates that the profile option is set at the application level. When a profile option is set at this level, it overrides the site level.
3. Responsibility: Indicates that the profile option is set at the responsibility level. The responsibility level settings affects users of a given responsibility. When a profile option is set at this level, it overrides both the site and application levels.
4. User: This setting affects individual users. When set, it overrides settings at the site, application and responsibility levels.

These profile setups are performed in addition to the Oracle Sales Online profile setup steps as listed in Step 12 of the Implementation Chart in this guide.

An asterik (*) after a profile name indicates that the user can set the profile in personal profiles within the application

Profile level symbols indicate:

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

Functional Area	Profile name	Profile level	Profile Description	Default Value
Opportunity	*PV: Default Opportunity Status	SU	Used to specify default opportunity status that appears in the opportunity summary window. For the 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	Time-out value used if no time-out value is set for Channel Manager’s country (OSO: Default Country).	0
Opportunity Assignment	PV: Default Partner timeout in hours	S	Time-out value used if no time-out value is set for partner’s country (OSO: Default Country).	24
Opportunity Assignment	*PV: Default Group	U	Used to determine the default group if user belongs to multiple groups.	
Opportunity Assignment	*OSO: Default Country	SARU	Used to determine time-out values for both Channel Managers and partners. This PRM setup step is required 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	Used by Vendor when establishing partner relationships.	

Access	*PV: User Types	SU	Used to define the type of matching each user is allowed: Assignment Manager is allowed global matching, Channel Manager is allowed matching with only his partners. Sales representatives and users cannot perform matching.	Sales Rep
Access	*JTF_ PROFILE_ DEFAULT_ APPLICATIO N	SARU	Default application ID of user. For PRM, it is 691.	
Access	*JTF_ PROFILE_ DEFAULT_ RESPONSIBIL ITY	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	

Set Up Profiles

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

Prerequisites

Log in as System Administrator.

Steps

Site Level To set profile defaults at the site level, follow these instructions. (As an example, this procedure illustrates how to set time-out periods.)

1. Choose **Profile > Syste**m.
2. Enter in the Profile field, PV%.
3. Click Find.

   The Find System Profile Values window appears.
4. Under Display, check off Site and Profiles with No Values.
5. 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 Time-out in Hours** = desired time-out period: for example, 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: for example, 10
- **PV: User Types** = Sales Representative

6. Flag channel codes as DIRECT or INDIRECT.

   a. Select Order Management Super User responsibility.

   b. **Navigate to Setup > QuickCodes > Order Management.**

      The Oracle Order Management Lookup window appears.

   c. In the lookup field, search for lookup type = SALES_CHANNEL.

      The channel codes list of values appears.

   d. For all indirect channel codes, enter INDIRECT in the Tag column.

      Fields with no Tag values entered are DIRECT channels.

   e. Save.

User Level

1. ***Switch to System Administrator responsibilities.***

   a. Select File > Switch Responsibility.

   b. Enter System Administrator.

2. Choose Profile > System.
3. Check off Site, User, and Profile with No Values.
4. In the User field, 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.

   The System Profile Values window appears.

7. In the User column for the JTF_Profile_Default_Application, enter the Oracle Partners Relationship Management application ID, 691.
8. In the user column for the JTF_Profile_Default_Responsibility, enter the appropriate ID number:

- **LAM or Assignment Manager** = 21865
- **CM** or Channel Manager = 21864
- **PV PARTNER USER** or Partner User = 22483
- **Sales Representative** =
- **System Administrator** = 22412

You can also perform this step 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.

To set other profile defaults at the user level, follow these steps (steps 9, 10, and 11 here are the same as 2, 3, and 4 above).

9. 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. Click Find.
14. Enter default values for:
    - **PV: Default Opportunity Status** = desired opportunity default for Opportunity Summary window
    - **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.
    - **PV: Customer Access Privilege** = "Sales Team", not "Full", to allow user to see partners in the Partner tab
15. To set other profile defaults at the user level, choose Profile > System.
16. Check off Site, User, and Profile with No Values.
17. Enter the user login you created earlier, for example, SGRAF, and tab out of the field.
18. In the Profile field, enter OSO%.
19. Enter the default value for the country:

20. **OSO: Default Country** = desired country

Step 7: Set Up Access for CRM Users

To enable existing crm users from other modules to access Oracle Partners Online, follow these steps:

Steps:

1. Assign the user partner relationship management responsibilities.

2. Login to the application.

3. Select Personal Profiles.

4. Configure the profiles that are available within the application found on page 16 marked with an asterik (*).

Set Up Partner Administration: Time-outs, Status Codes, Attributes

Oracle Partners Online provides some seeded values upon installation: attribute values, time-out defaults, and opportunity statuses. After an Oracle Partners Online sysadmin user has been created and assigned responsibilities, the user can use the Administration tab to add new data, set up time-out defaults, attribute codes, and attribute display characteristics, and perform relevant administrative tasks from the HTML user interface side.

Step 8: Set Up Time-outs

Prerequisites

Log in with System Administrator responsibilities.

Time-outs are time periods during which an action is expected to take place. There are potentially four time-out types: Channel Manager, Partner Time-out, Active, and Stale Time-outs.

Channel Manager Time-out limits the time period a Channel Manager can have an offered opportunity before it is forwarded to the assigned partner. If the Channel Manager does not process the opportunity, it is forwarded automatically to the partner.

Partner Time-out limits the time period during which a partner can respond to an offered opportunity before it is recycled or offered to another partner.

Guidelines

Set up time-outs in hours, not days, by country and period. The setup window allows time-out periods to vary for different countries.

If only one time-out period is used across sites, the default time-out period can be set up in the HTML user interface Profile window.

Step 9: Set Up Status Codes

User access to opportunities is determined by opportunity status. Set up the status codes in these windows.

Prerequisites

Log in with System Administrator responsibilities.

Set Up Status Codes: View By User Type

User types include Assignment Manager, Channel Manager, Sales Representative, and Partner User.

Valid opportunity statuses specific to Oracle Partners Online include Active, Unassigned, Matched, Offered, and Recycled. (The valid statuses that are applicable to other Sales applications include New, Preliminary, On-Hold, Won, Lost, Inactive.) Accepted and Declined are also noted among the assigned statuses.

Duration of status and time-out periods apply only for those values that transition from matched to offered, and from offered to active.

Set Up Status Codes: Transition

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

- A selected Inactive flag invalidates an opportunity status.
- An LOV flag determines whether a value is displayed as part of the list of values.
- Time-out notify flag notifies other selected user types when one of the two time-outs, matched and offered, have occurred.
- A selected checkbox for Notify Partner, Notify CM, Notify AM, or Notify Secondary Support designates the user types to receive email notifications when an opportunity status changes.
- Status From and Status To columns indicate a sequence of possible opportunity status values that can be selected from the list of values.

Guideline

When Partner Users are inactivated (the checkbox is ticked), their names disappear and cannot be restored to view by clicking the Restore button.

Step 10: Set Up Attributes Types and Partner Matching

Oracle Partners Online provides common attributes that can be used to describe partner profile information and opportunities that are used during the partner matching process. The windows are accessed through the Attribute link on the Partner Summary window.

These common attributes provided in the Oracle Partners Online module include Country, Capacity Rating, Functional Expertise, Geographic Coverage, Industry, Vendor Products and Purchases, Vendor Certification, Partner Services and Solutions, and Marketing Programs. Custom attributes can be easily created.

The attributes Country, Vendor Products and Purchases, and Marketing Program pull values from CRM or ERP tables that are entered in places other than in the Administration tab when customer, item details, and marketing campaign details are created.

Values for some attribute types must be entered in the Administration tab. These values can be accessed and used from drop-down boxes when updating a specific partner or opportunity.

In the Administrative tab, (for example) the Partner Solutions and Services attribute type has values of Hardware, Software, and Consulting that appear when you are updating partner data. At the transactional level, PRM describes the partner of attribute type Solutions and Services with the value Consulting.

The attributes are ranked and used to match opportunities and partners. 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.

Prerequisites

Log in with System Administrator responsibilities.

Steps

1. Enter attribute types in the main Attribute window on the Administration tab.

   These values can be accessed and used from drop-down boxes when updating a specific partner or opportunity.

2. For Automatic Matching, assign a rank to each attribute.

The lower the rank number, the greater the ranking value. For example, 1 weighs more heavily than 5.

3. Create custom attributes from this Attributes window as well, using the Attribute drill-down window with menu choices, Opportunity and Partner.

Manual ranking works similarly to the ranking procedure for automatic matching, except that you can define other values to apply in the manual search for partners.

Steps

1. To further define the behavior of the attributes, drill down on an attribute type 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**.**
3. Enter:
   - Data Source = **External**, if the field is from a CRM or ERP table
   - Data Source = **Internal**, if the field is new
4. 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**.
5. 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.
6. Add the correct source table and source column for the new attribute.
7. To complete the creation of the custom attribute, run the concurrent program, PV Refresh Attribute Text Table. ***See Run Concurrent Programs.***

Step 11: Set Up Codes for Attribute Values

Prerequisites

Log in with System Administrator responsibilities.

Steps

1. Select the particular attribute type from the list of values.

2. Define the attribute codes, for example, Hardware, Software, and Consulting, for the attribute Partner Solutions and Services.

3. Check the box in the specific row to enable it for automatic matching.

Step 12: Set System Profiles

Refer to ***Oracle Sales Online Implementation Guide*** for information about setting up other necessary parameters for using this application. See the necessary steps for setup in the OSO Implementation Steps chart, Step 12, on page 11 of this guide.

Step 13: Run Concurrent Programs

Refer to the Oracle Applications ***System Administrator's Guide.***

Guidelines

- Run Territory Manager to identify the Assignment Manager's territory.
- Run the two Oracle Partners Online 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 time-out processing.