

Oracle® Partners Online

Concepts and Procedures

Release 11*i*

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Oracle Partners Online Concepts and Procedures, Release 11i

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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 Partners Online. Oracle Partners Online is also known as Oracle Partner Relationship Management.

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

Intended Audience

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

This guide assumes you have an understanding of your 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 Partners Online“ 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 Partners Online“ provides process-oriented, task-based procedures for performing essential business tasks using the application.
- Partners Online release 11.5.5 enables certain new partner facing features, provides new more detailed views of partner information, provides a centralized view of direct and indirect opportunities, supports advanced searches for partner organizations and contacts, and improves integration with the other Sales products within the eBusiness suite.
- Additionally, on the administration side, the configuration of new partner attributes is simplified in Oracle Partners Online 11.5.5.

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 11i.

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 Graphical User Interface, (GUI) available with Oracle Applications Release 11*i*.

Oracle Partners Online Implementation Guide

This document describes how to set up and configure Oracle Partners Online.

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 Human Resources Management System (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.

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Understanding Oracle Partners Online

Oracle Partners Online (POL) is also known as Oracle Partner Relationship Management (PRM). 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 and third-party applications.

Overview

Benefits of Using Oracle Partners Online

Tight Channel Collaboration and Integration

Oracle Partners Online facilitates collaboration between the enterprise, partners and customers. Workflow processes support good communication and movement of information among these groups through email notifications, timeout periods, and routing of sales deals to partners.

Working with Oracle Sales Online and Oracle TeleSales, sales opportunities can be routed seamless from anyone in the direct sales force to key partners in the indirect channels. Sales deals can be given to partners or worked on in collaboration with partners.

Both Single-tiered (vendor to partner) and Multiple-tiered (vendor to partner to partner) transactions are supported. Oracle Partners Online integrates with the entire Oracle eBusiness suite.

Flexible Partner Matching and Routing

Flexible ranking, matching and routing bring sales opportunities to partners best able to service and close the deal. Ultimately this leads to shorter sales cycles,

increased sales, and improved customer satisfaction. Criteria, known as partner attributes are used to match sales deals with partners. These attributes can be ranked and weighted according to business preferences.

Partner profiles, rich with these partner attributes, find the optimal partners for a sales deal. Partner attributes are also readily configurable through the administration user interface provided in the solution. When sales deals are assigned to a partner list, flexible routing options enable offers to partners singly, serially, or in multiple parallel fashion.

Effective Partner Management

Oracle Partners Online captures detailed and comprehensive partner profile information through the use of the flexible Trading Community Architecture (TCA). It establishes the complex relationships and allows for easy setup of partner users. Effective management of strategic relationships and distribution of information are supported by improved partner communications and personalized content management. It allows for partner reporting and feedback to provide a closed partner relationship management loop.

Increased Partner Loyalty

Oracle Partners Online improves vendor-partner relations through increased collaboration and ease of doing business. Oracle Partners Online provides a user-friendly solution accessible to partners via the internet. Oracle Partners Online helps partners to increase their revenue by providing them access to effective sales tools and product information and effective sales deals tracking throughout the sales cycle. Oracle Partners Online also reduces channel conflict by providing effective territory management and a secure environment for confidential partner communications.

How Oracle Partners Online Functionality is Organized

Oracle Partners Online functionality is organized into 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 **Opportunity** tab to create and route opportunities by adding details about the sales transactions, customers, contacts, and type of products and solutions needed.
 - Use the **Customer** tab to keep summary customer details and identify a sales team that is working on a specific opportunity.
 - Use the **Partner** 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.
- The following table shows the access of tabs by the user's responsibility.

Tab Access by User Responsibility

TAB MATRIX	ACCESS			
	Vendor User		Partner User	
Tab Name	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

TAB MATRIX	ACCESS			
	Vendor User			Partner User
Compensation	Y	Y	Y	Y
Fulfillment	Y	Y	Y	N
Encyclopedia	Y	Y	Y	Y
Administration	Y	N	N	N

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 Partners Online 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 "Profile vs. Responsibility"

Term/Acronym	Definition
Assignment Manager (AM)	A Vendor side role that has responsibility for assigning and routing opportunities to Partners, sharing tasks and maintaining a relationship with the Channel Manager; handles the initial sales deal and the matching and ranking; front end of the process.
Channel Manager (CM)	The Vendor side role that owns and manages the channel relationship between the Vendor and the partner and manages and distributes information to the Partners; assigned either to specific named Partners or to a territory that is defined by geography, product category, industry vertical or other categories.
Channel Manager Timeout	A timeout period 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.
Indirect Managed Partner (IMP)	Smaller Partner organizations that deal with VADs to purchase and resell specific vendor items
Managed Partner	An organization or person who has a strategic agreement with the Vendor to conduct certain transactions and is managed directly by the Vendor: typically large Partners who bring a significant amount of business to the Vendor. As such, Vendor usually assigns a Channel Manager to build and maintain a good partner relationship.
Broadcast Assignment	In this routing assignment option, the AM assigns an opportunity simultaneously to multiple Partners, and whoever accepts the opportunity first is the Partner on the opportunity.
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; Partner Organization	A business entity that sells products or services that are complementary to the Vendor's offerings; includes Value Added Distributors and Value Added Resellers.
Partner Contact	The primary contact for a Partner, the role responsible for administering all Opportunities assigned to the Partner; receives email notifications and accepts/declines opportunities on behalf of the Partner. Multiple Partner Contacts for one Partner organization can be on a sales team for one Partner Organization.
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.
Responsibility	Responsibilities allow users, (Partners, Vendors and VADs) access to the application for various tasks, that are tied to their duties, either a user or an administrator.
Profiles	Determines what functions, (within the application) the user or administrator can control and perform.
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	Partner timeout is based on a partner's country; it is the time period during which a Partner who has been offered an opportunity is expected to respond (accept/reject the opportunity) before the next action can occur. A CM timeout is defined based on the CM's country: after receiving an opportunity assignment from the AM, the time period during which the CM can accept the assignment, replace the original Partner with a new partner, or reject the assignment. These time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and opportunity status changes.
Value Added Distributor (VAD)	A Partner who purchases from the vendor and resells to other resellers or to the ultimate end customer; may have 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.
Vendor	A business entity or party that sells its products or professional services directly or indirectly to customers. An indirect sale to a customer may occur through Partners (for example, a VAD).

Functionality

Oracle Partners Online 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 Partners Online 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.

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 using Resource Manger 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 using Territory Manger to do these tasks, refer to ***Oracle CRM Foundation Concepts and Procedures***.

Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases 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 from matched to "offered" once the Channel Manager has approved the routing to the partner.
- 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 multiple parallel.
- 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.

This workflow supports the opportunity routing to the partners. During implementation, the business which installs Partners Online, may want to know the workflow name, to customize it in the future.

Understanding Responsibility Assignments

In Oracle Partners Online 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.

Responsibilities: Allow users, (Partners, Vendors or VADs) access to the application for various tasks, tied to their duties either a user or an administrator.

Profiles: Determines what functions, (within the application) the user/administrator can control and perform.

- [Assignment Manager \(Vendor Side\)](#)
- [Channel Manager \(Vendor Side\)](#)
- [Partner Contact \(Partner or VAD\)](#)
- [System Administrator \(Vendor Side\)](#)

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, or multiple parallel.
- 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.

To maintain and run Concurrent Programs, refer to the guides listed below:

- *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 secondary phone support person.
 - * Partner contacts and user registration: contact login and password.

Request Collateral

Identify specific people or contacts to receive collateral. Create Collateral Requests to send relevant documents to customers and/or Partners.

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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 as Assignment Managers, with the exception of partner matching. 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 from matched 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.

The Sales team on the opportunity usually includes the original creator, Channel Manager, Assignment Manager, Partners and relevant Sales representatives.

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Partner User

Partner access to Oracle Partners Online enables Partners 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.

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Partners Online Administrator/Partner

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.

In addition to the administration setups, the Partners Online Administrators/Partners can have the same assignments as the Assignment and Channel Managers, if so desired.

These assignments are described in Assignment Manager and Channel Manager Responsibilities.

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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 Managers Review Assignments	5. Partner Accepts/ Declines Opportunity	6. Process Partner
Features Associated with Steps	Import from Oracle Telesales Enter manually into OTS Enter manually into PRM	Rank partner: Automated search Manual search	Options for offering: single, serial, multiple parallel	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 during Steps	Opportunity Status: unassigned Access: AM, CM, Phone Support	Opportunity Status: matched Access: AM, CM's if they enter the opportunity	Opportunity Status: matched Access: AM, CM's if they enter the opportunity	Opportunity Status: matched Access: AM, CM's 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 re-routes it to the Channel Manager with recycled status.

- If the offer is declined and it is a serial offer, Workflow automatically re-routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.
- If no partners accept the opportunity, then the opportunity status is changed to “recycled” and is sent back to the Assignment Manager.

Vendor Access

For Vendors, Oracle Partners Online functionality is organized by these tabs.

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

Home

Partners Online Home Page is coming soon.

Activity

Set up this area to schedule and track related tasks, assignments, and activities. Tasks can be created and related to opportunities, organizations and people. These tasks can be found in the task summary page or in the details of the specific opportunity, organization and person.

For example, under the Opportunities tab, the tasks created here are specifically related to a particular opportunity.

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Opportunities

Initial sales stages can progress to opportunity, sometimes to quote, and finally into orders. Oracle Partners Online 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, partner collaboration, and processing.

The Partners Online opportunity summary screen now has seamless integration with Sales Online. This provides a consistent view of opportunity information to Partners Online and Sales Online users. Additionally, this consistent view allows vendor users such as telesales representatives, field representatives, and channel managers to view and update all of their direct and indirect opportunities in a centralized place.

This seamless integration among the Sales applications in the eBusiness suite supports initial opportunity creation by different departments or applications. These opportunities are passed through the indirect sales channels to Partners or are jointly worked on with Partners through Partners Online.

Sales opportunities flow to Oracle Partners Online either automatically from Oracle Sales Online or Oracle TeleSales, or directly through manual entry into the application.

The Assignment Manager (AM) on the vendor side then sets the appropriate partner profile to be matched to the opportunity and determines the appropriate assignment option (single, serial, multiple parallel).

The Channel Manager (CM) is notified when any of his partners receive an assignment and decides whether to approve, reject, or modify the assignment. If the CM takes no action, Oracle Partners Online forwards the opportunity to the partner.

The partner then accepts or declines the opportunity. If the partner accepts, Oracle Partners Online begins tracking that opportunity with that partner. If the partner declines, the opportunity recycles back to the pool and is redistributed, depending on the assignment option determined by the AM.

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

Opportunity Management

Vendors can use Oracle Partners Online functionality to analyze their sales 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 Oracle Sales Online, 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.

The Opportunity Detail links from this main opportunity details page include [Contacts](#), [Notes](#), [Sales Teams](#), [Tasks](#), [Classification](#), [Competitors](#), and [Attachments, as they relate to the specific opportunity](#). These represent general areas of information and categories similar to Oracle Sales Online functionality. Oracle Partners Online supports specific Partner Relationship Management processing and procedures through the Match Partners and View History buttons, on the main opportunity detail page.

View History

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

- The date which an offer is rejected, accepted, matched, etc.
- The assignment types (such as: Single, Serial, or Broadcast Routing)
- Associated Partner and Channel Managers for a given 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 in the far right, 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.

There are unlimited numbers of new attributes that can be configured and associated to a Partner profile, and used in opportunity matching.

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 routing options for sending an opportunity to partners include single, serial, and broadcast routing.

There are unlimited numbers of new attributes that can be configured and associated to a Partner profile, and used in opportunity matching.

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. The **Go To Unassigned Opportunities** button, navigates to the opportunity summary page where the saved query called "**My Unassigned Opportunities**" are displayed.

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 Page

The predefined view of Sales Partners, Contacts, and Exchange Partners displays summary level information about the Partner contact.

Notes

Notes management is a Foundation component used across the various CRM applications. Notes is a general area where comments, justifications and additional details can be tracked. Notes can be marked as public or private, and associated with various objects, such as Partner organizations, opportunities and others.

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 while playing specific roles.

Tasks

Tasks are activities or events, such as, callbacks, luncheons, etc. that need to be done. Tasks can be assigned to members within or outside of the user's Sales Team. Tasks can be associated with various objects, such as, Partner organizations, contacts, opportunities, etc.

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. These classifying attributes may be updated, restored, or removed by modifying the information and clicking the appropriate buttons.

Competitors

In this Opportunity Detail window, find out who you are competing with, note direct competition with specific products, and track comments.

Attachments

In this window, add any document associated with the transaction, such as proposals, notes, videotaped presentations, etc. Additions and updates to attachments are possible.

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Customer

The Customer subtab, Organization, lists summary customer details. When the Customer's organization name is selected, the Main summary window appears first, with links to Relationships, Opportunities, Notes, Sales Team, Tasks, Interactions, Attachments and the 360 View.

The main page in organization detail, displays high level information, including addresses, customer category, annual revenue, total employees, year established, web site, lifetime value, SIC Code type and code, DUNS number, business line, Tax ID, Fiscal year end and last order date. Other customer-related menu choices include information about the sales team working on a specific opportunity.

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Partner

The following 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 All Partners Partner Summary page present information about each type of Partner: Exchange, Sales, and General Partners.

Exchange Partners can participate in the opportunity exchange system between multiple vendors and a partner.

Sales Partners has a specific partner agreement that allows the vendor to pass a sales deal to that partner through Oracle Partners Online.

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.

Partners Online 11.5.5 features new Partner profile management features. Channel managers can choose as their default "My Partners" view: All Partners, Sales Partners, and Exchange Partners.

- The All Partners view displays all Partner types that were created across the eBusiness suite.
- Sales Partners have strategic selling agreements with the internal Vendor, and therefore can be added to the Sales Teams of opportunities.
- For the opportunity Exchanges system, Exchange Partners can send or receive opportunities from any Partner that participates in the external centralized system.

These Partner views are applied when looking at the summary screen of the organizations and the contacts. Alternatively, if user wants to perform an advanced search, save a new personalized search, or specify a new default “My Partners” view, 11.5. offers advanced searches capabilities for Partner organizations and Partner contacts. These advanced searches allow sales representatives and Channel managers to look up Partner organizations and contacts with relevant skills that should be placed on sales deals.

Partner Detail

Look at the relationship link of “Partner of” or “VAD of” to find the following information about a specific 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 relationship details page of the particular Partner window, a Partner can be enabled for **Opportunity Exchange**. Opportunity Exchange allows the vendor and other organizations to collaborate on opportunities. The opportunity can be created in the Sales Online, (not Partners Online) or another third party application and passed to another through the **LETS** database, (Opportunity Exchange Transaction Server) an external exchange database. Opportunity Exchange occurs between all partners in the system.

Oracle Partners Online supports an internal vendor who may pass sales opportunities to only their Oracle partners. Oracle Partners Online 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 the internal business has agreed to share sales opportunities with the specific partner, and has entered any of the Partner related fields in the “Partner of” relationship details. The revenue fields are free text form, so the revenues accrued by the particular Partner Organization, are not automatically calculated and displayed.

A partner can be assigned the classifying 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’s skills and assist in matching the opportunity to the appropriate Partners.

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, by the internal vendor organization or by themselves, through a self service application, such as: Oracle **iStore** or Oracle **iSupport**. The summary person detail includes contact's name, relationship (mainly, employee of one or more partners), organization, role, address, phone number, email address.

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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 (the default page in the Compensation Tab), **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 period.

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.

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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. You can also sign up for desired published groups to receive information feeds. 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. The Partners also view their personalized content through the Marketing Encyclopedia in Partners Online. Oracle's Marketing Encyclopedia can push specific content to Partners based on group characteristics such as certification and Partner levels. Alternatively, content can be passed to Partners by individual Partner characteristics, such as past purchases and the opportunity summary.

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 time-outs, status codes, attributes, and attribute values.

In Partners Online administration setup area, the process of configuring new attributes in Partner profiles, is performed. The administrator can simply enter the name, description, and display details of the attribute and the new attribute will automatically be setup in the underlying Partners Online database table.

These aspects of administration are addressed in the ***Oracle Partners Online Implementation Guide***.

Partner Access

Oracle Partners Online supports almost every type of vendor-partner relationship.

- Value Added Distributors
- Resellers / Value Adder Resellers (VARs)
- Service Providers (SIs)

- IS, ASP
- Technology partners
- Strategic Alliances
- Suppliers (internal vendor)
- Distributors

Partners access the vendor's Oracle Partners Online system through the vendor's internet address (URL) by logging in with a password. Oracle Partners Online has a hybrid structure: the vendor user interface features guide the agent whereas the partner interface is structured by self-service features.

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

- [Home](#)
- [Opportunity](#)
- [My Partner](#)
- [Compensation](#)
- [Encyclopedia](#)

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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. From the "offered" opportunity link, (selecting a specific opportunity) will bring up Opportunity Detail, which shows links to Contacts, Notes, Sales Team and 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.

Main information on a given opportunity includes customer name and address, opportunity and project names, status and sales stage, channel type, budget and approval information, etc. The record also charts vendor purchase items (Product Category, Campaign, Unit of Measure, Quantity and Amount) and solutions and services. (Product Category, Quantity, Unit of Measure and Amount)

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

Through integration with other Oracle Sales Online, 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” 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.

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My Partner

Partners see the information on this tab about their own company when they log in. The Organization Detail information is organized in these subtabs: **Main, Relationships, Notes, Sales Team, Interaction, and 360 View.**

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

Personal profiles of partner contacts under the “Person” subtab 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 Groups* 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.

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

Under the "*Compensation Plan*" subtab, *My Compensation Plans* indicates the sales role, start and end dates, and plan status.

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

Under the *Reports subtab*, Partners can view reports and brief descriptions. Clicking on a specific report name will bring up more details.

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. You can also sign up for desired published groups to receive information feeds. To customize this page to fit your business needs and communicate global messages or announcements, edit the `jtflogin.jsp` file using an HTML or text editor.

Deploy Oracle Marketing Encyclopedia to display news feeds out of MES on this page. The Partners also view their personalized content through the Marketing Encyclopedia in Partners Online. Oracle's Marketing Encyclopedia can push specific content to Partners based on group characteristics such as certification and Partner levels. Content can be passed to Partners by individual Partner characteristics, such as past purchases and the opportunity summary.

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

Using Oracle Partners Online

The following group of topics, provide process-oriented, task-based procedures for using the Partners Online application to perform essential business tasks.

Attributes

Attributes are usually defined during the implementation process. Because additional attributes can be created, and removed by the appropriate user, the instruction below is included in this manual.

Adding/Removing Partner Attributes

Log in as Assignment Manager, Channel Manager, or System Administrator

Navigate to the following: **Partner tab > Partner Summary Detail**

Steps

1. Click the Attributes hyperlink for a specific organization listed in the Partner Summary table.
2. In the Attribute field select a general attribute from the drop down box, such as Functional Expertise, Partner type, Industries, and Geographic Coverage, etc.
3. Assign a value in the Value field from the list of values. The attribute category selected drives, which attribute values in the subsequent column are available for selection.
4. Click Update to save changes.

Note: Attributes are not limited to the predefined list. Additional attributes can be created through the administration setup page when logged in as a system administrator.

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.

This program can be scheduled to be run at particular intervals. 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.

Adding/Removing Opportunity Attributes

Attributes are usually defined during the implementation process. Because additional attributes can be created, and removed by the appropriate user, the instruction below is included in this manual.

Log in as an Assignment Manager, Channel Manager, or System Administrator

Navigate to the following:

Opportunity > 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.

Setting Up Time-outs and Expiration Periods

Log in as an System Administrator and navigate to the following:

Administration tab > Time-outs

Steps

1. Select the type of timeout view from the list of values: 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 time-outs.

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 time-outs, consider how efficiently a country can respond to an opportunity. Set opportunities subject to time-outs to support a faster sales cycle.

Setting Up Status Codes

Log in as System Administrator and navigate to the following:

Administration > Status Codes > Status Notifications-View By

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 > Status Notification > 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 Opportunity Matching 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

By selecting attribute details, you are able to select attributes for either the Partner or the Opportunities.

Steps

1. Select the predetermined matching attributes where appropriate. These opportunity matching attributes include campaign code, country, customer support capability, geographic coverage, etc. Attributes are not limited to the predefined list. Additional attributes can be created.
2. Click on a particular attribute name. In the Partner and Opportunity attribute details-screen, indicate whether the attribute is active.
3. Click **Update**.

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

Setting Up Opportunity 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 list of values, “Functional Expertise” and click **Apply**.
2. Define values specifically by indicating quantities of money or employees.

3. Create other attributes, if needed.
4. Click **Update**.

Quick Find

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

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”.

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.

Advanced or Saved Search

The **Advanced** or **Saved Search** feature provides a way to save searches that are common to the User.

The Advanced or Saved Search feature is located on the main page of all tabs with the exception of the Home, Forecast, Compensation, Encyclopedia and the Administration tabs. The drop down window to the right of “**Saved Searches**” holds all searches that have been saved.

There are two tabs located to the right of the saved search window.

Personalize: Clicking this button allows the user to set the parameters of their search and save them for future searches. Once the search is saved, it will appear in the ***Saved Search*** drop down list.

Search: Clicking this button allows the user to perform a search based on the parameters set in the ***Saved Search*** drop down list.

Quickly Finding a Partner

Log in as Assignment Manager or Channel Manager.

The Quick Find feature is available from any of the main summary and detail screens.

Steps

1. In the Quick Find fields, select Partner from the list of values.
2. Leave the next field blank or type in one or several letters of a Partner if you know it.
3. Click **Go**.
Search Results appear.
4. Click the Partner organization's name and view or modify the Partner organization's details.

Creating a Partner

Log in as Assignment Manager, Channel Manager, or System Administrator

Navigate to the following:

Partner > Partner Summary

1. Click the Create button.
2. Fill in details for the organization: organization name, alias (also known as), phone number, email address.
3. Supply other known information, including annual revenue, customer category, fiscal year end, total employees, year established, tax ID, DUNS number and web site.
4. For the Partner Details section, 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 revenue year-to-date.
5. Indicate the Channel Manager and secondary 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, phone, email, job title, and note whether this person is a decision-maker.
8. Add an Organization Relationship by indicating the organization name, relationship, related organization, active or inactive, start and end dates.
9. Click the Create button when finished.

Viewing Partner Summary Detail

Login as Assignment Manager, Channel Manager, or System Administrator

Navigate to the following: **Partner > Partner Summary Detail**

Steps

1. View summary details of partner organizations by selecting on of three saved searches: All Partners, Sales Partners or Exchange Partners, then click the Search button.
2. Drill down to any Partner organization's name to view/modify the Partner's organization details.
3. Click the Create button, if you wish to create a partner.
4. When modifications are complete, click Update to save changes.

Viewing/Modifying Partner Profile Details

Log in as Assignment Manager, Channel Manager, or System Administrator

From the Partner tab, navigate to the row of the Partner organization you wish to view and click on the Partner organization's Relationship type, (Partner or VAD). Follow the steps below to fill out the Partner Profile Detail page.

Steps

1. View and/or modify Partner Profile Details on this page.
2. Fill in Relationship and Partner descriptions: Partner level, purchase method, target revenue, preferred VAD, revenue year to date.

3. Identify Channel Manager and secondary phone support person.
4. Click checkboxes to enable for Opportunity Exchange and Automatic Matching, if appropriate.
5. Click Update.

Creating a Partner Relationship for an Existing Organization

Follow the steps below to create a Partner Relationship from the Partner tab.

Log in as Assignment Manager, Channel Manager, or System Administrator

Navigate to the following:

Partner > Partner Summary

Steps

1. Click Create.
2. Search for an existing organization by typing the name of the organization in the **Find Partner** field, (which is located below the Create & Restore buttons) and then click the Go button.
3. When the organization is selected, the user is automatically taken to the organization detail's page.
4. Select Relationship details.
5. In the organization to organization section, partially enter the Vendor organization's name, (optional).
6. Click on the Go button.
7. Select the internal organization as the related organization in the organization-to-organization relationship.
8. Select relationship type Partner of or Relationship of.
9. Click Update.
10. Drill down into the Relationship type.
11. Enter Partner details.
12. Click Update.

Follow the steps below to create the reciprocal relationship on the Vendor organization's details.

13. Click the Back button in the browser until the Partner Relationship Detail window reappears.
14. Click on the Internal organization's name.
15. Select the new Partner as the Related organization.
16. Repeat steps 1-10 above, that were used to create the relationship from the Partner side.

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

Navigate to the following:

Partner > Contact Summary > Contact Detail > Relationship Contacts of Partner organizations

Steps

1. Select Saved searches for All Partners, Sales Partners and Exchange Partners. Click on the Search button.
2. View identifying information: Partner organization, role, address, phone number and email.
3. To find more detailed information about a specific Partner contact or to update his information, drill down on it's name.
4. From the Partner Contact summary screen, click Create to create a new Partner Contact.
5. Enter Partner Contact information.

Required fields of information include only the organization name, with whom the Partner Contact is associated, and the contact's full name. Other identifying fields are phone, email, job title and more.

6. Click the Create button.

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 Partners Online system.

For information on how to use the search capabilities, go to [Quick Find](#).

Log in as the Assignment Manager, Channel Manager, or System Administrator

Navigate to the following:

**Customer > Contact Summary > Relationship type of a particular contact:
Employee of**

Steps

1. Click on the Relationship type “employee of” a Partner contact’s name in the summary table of Partner Contacts.
2. In the Relationships type details page, fill in appropriate information: names, title, relationship, role, manager, start and end dates, contact information.
3. In the User Registration section: select the desired 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. Click Update.

Note:

Vendors maintain this information for contacts so that they can login into the Partners Online application through the extranet.

Viewing My Partner’s Organization Relationship Detail

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

Organization to Organization Relationships

Log in as Partner and navigate to the following:

My Partner > Organization > Organization Detail > Relationships

The Partner's view of his own company's details is similar to the regular organization details pages.

Viewing My Partner's 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 a Partner and navigate to the following:

My Partner > Organization > Organization 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 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 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 a Partner and navigate to the following:

My Partner > Organization > Organizations Details-Interactions

My Partner > Person > Organizations Details-Interactions

The Partner's user's view of his own company's details is similar to the information provided in the regular organization details page.

Viewing My Partner's 360 View Details

You can view post-sales information about your company in the "360 View" page. View by company account, related information such as, orders, invoices and service requests.

Log in as a Partner and navigate to the following:

My Partner > Organization. Organization Details > 360 View

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 Partner > Person > Person Details-Main

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 a Partner and navigate to the following:

My Partner > Person > Person Details-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 Partner Contact Relationship Details

If you are a Partner Contact, use this window to view the Person to Organization Relationships of a particular Partner Contact that works for your company.

Login as a Partner and navigate to the following:

My Partner > Person > Person Details-Relationships

Viewing My Partner's Main Details

Use this page to see details of your company, if you work for a Partner 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 a Partner User and navigate to the following:

My Partner > Organization > Organizations Details-Main

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

Viewing My Partner Sales Team Details

Use this window to review details of the your campaigns 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 Partner > Organization > Organization Detail-Sales Team

My Partner > 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 Partner > Person > Specific Person > Person Detail-Main

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. In the Relationship type details, 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 up-to-date.

1. In the Create Partner Contact page.
2. In the Personal profile page (profile icon at top of every page above tabs).
3. In the user's record in Resource Manager by a System Administrator.

For information on how to use the search capabilities, go to [Quick Find](#).

Log in as Partner and navigate to the following:

My Partner > Person > Relationships

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 an Assignment Manager, Channel Manager, or System Administrator

Navigate to the following:

Opportunity > Opportunities Summary > Create Opportunity Button

Steps

1. Click Create.
2. Indicate the customer: Click on the Go button. 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.

Creating 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 an Assignment Manager and navigate to the following:

Opportunity > Main Summary > Opportunity Details-Main

Steps

1. Click a specific Opportunity name.
2. View or modify the specific opportunity's details.
3. To view the history of an opportunity, click View History.
4. To match the opportunity with partners, click Match Opportunity.
5. Keep the recommended Partner list, "as is" or modify it. See the Partner Matching section for instructions.
6. Decide upon the desired routing method for offering the opportunity to the Partners: single, serial, multiple-parallel.
7. Decide whether to table the opportunity or to assign it.

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. Partners Online's Partner matching engine will create a recommended Partner list for the specific opportunity. This list matches the details of the opportunity with the details on all of the Sales Partner's profiles. If a Partner matches more attributes than another Partner, it will automatically rank higher on the recommended Partner list.

Log in as Assignment Manager

Navigate to the following:

Opportunity > Opportunity Main Summary > Opportunity Details-Main > Match Partners

Steps

1. Click opportunity with “unassigned status”.
2. Click Match Partners.
3. View the recommended Partner list.
4. If you want to manually add Partners to this list, you can perform a manual search.
5. Access the Manual Matching window to search for specific attributes, for example, vendor certification or customer support capability. Enter your search criteria and click Search.
6. To add partners to the matching list, from the search results, check off the desired Partners names and click Add to Partner Assignment List.
7. You can manually change any of the ranking associated with the Partners on the list.
8. When you have derived a satisfactory list, select the partner assignment/routing method.
9. The routing method determines how the opportunity is offered to Partners on the list:

Single: only goes to the Partner ranked “1”.

Serial: the Partner ranked “1” is offered the opportunity first.

Broadcast: all of the Partners are offered the opportunity on a first come first serve basis. Only one Partner can work on an opportunity at a time.

Viewing Manual Matching Results

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

Log in as an Assignment Manager

Navigate to the following:

Opportunity > Opportunity Summary > Opportunity Details-Main > Match Partners Button > Manual Search

Assigning an Opportunity

Log in as an Assignment Manager

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 Submit Assignment to start the Workflow routing and notifications to the Channel Managers of the Partners on the final Partner list.

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.

Accepting/Declining Opportunity Assignment

For information on how to use the search capabilities, go to [Quick Find](#).

Log in as the Channel Manager

Navigate to the following:

Opportunity > Opportunity Summary > Opportunity Details-Main

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.

Updating an Opportunity

After a Partner accepts an offered opportunity, the opportunity window refreshes and allows the Partner to update the opportunity.

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 where appropriate.
4. Adjust partner solutions and services.
5. Click **Update**.

Selecting a Contact

***Log in as Assignment Manager or Channel Manager and navigate to the following:
Opportunity > Opportunity Summary > Opportunity Detail-Contact***

Steps

1. In the Quick Find fields, select **Contact** from the list of values.
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.

Assigning a Sales Team/Adding/Removing a Salesperson

Log in as Assignment Manager

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.

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 > Opportunity Summary

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 > Opportunity Summary

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” in the 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 refreshes and becomes update able if the offered opportunity 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 Summary > 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 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 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 Summary > Opportunity Detail-Sales Team

Viewing Offered Opportunities Classification

Log in as a Partner and navigate to the following:

Opportunity > Opportunity Summary > Opportunity Detail-Classification

Use this window to review which Partner Solutions and Services the customer is interested in.

Viewing Active Opportunities Main Detail

Log in as Partner and navigate to the following:

Opportunity > Opportunity Summary > Opportunity Detail-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**.

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 Summary > Opportunity Detail-Contacts

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 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 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.

Log in as Assignment or Channel Manager or System Administrator

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**.

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.

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.

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