Oracle® Partners Online

Implementation Guide

Release 11*i*

February 2002

Part No. A95218-02

ORACLE®

Oracle Partners Online Implementation Guide, Release 11*i*

Part No. A95218-02

Contents

4 Implementation Overview

5 Implementation Tasks

6 Integrating Oracle Partners Online

Send Us Your Comments

Oracle Partners Online Implementation Guide, Release 11*i*

Part No. A95218-02

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most?

If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). YYou can send comments to us via the postal service.

Oracle Corporation
CRM Content Development Manager
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Partners Online Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Partners Online

  If you have never used Oracle Partners Online, Oracle suggests you attend one or more of the Oracle Partners Online training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to implement Oracle Partners Online.

- Chapter 1 is an introduction to Oracle Partners Online.
- Chapter 2 provides an architectural overview of Oracle Partners Online.
- Chapter 3 discusses mandatory and conditional dependencies Oracle Partners Online has on other products and components.

- Chapter 4 provides an overview of the implementation process and task sequence.
- Chapter 5 details the implementation tasks required to successfully implement Oracle Partners Online.
- Chapter 6 lists products integrated with Oracle Partners Online, as well as the related and additional documentation sources.
- Chapter 7 is a glossary.
- Appendix A contains a table of system profiles.
- Appendix B lists concurrent programs.
- Appendix C contains a table of Lookups.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at `http://www.oracle.com/accessibility/`.

Accessibility of Code Examples in Documentation JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Partners Online.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Partners Online shares business and set up information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Partners Online.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Partners Online (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Many of the implementation tasks in this guide refer to other documents.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as Auto Upgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

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 concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Other Implementation Documentation

Oracle Workflow Guide

This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes.You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Partners Online implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Partners Online and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization’s structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Partners Online working for you. This team includes your Technical Representative, Account Manager, and Oracle’s large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle *MetaLink*

Oracle *MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle MetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (http://metalink.oracle.com).

Alerts: You should check Oracle *MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction

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

This chapter contains an overview and introduction to Oracle Partners Online and contains the following topics:

- Oracle Sales Family Overview
- Oracle Partners Online Product Features
- Oracle Partners Online Tab Access

1.1 Oracle Sales Family Overview

Oracle Sales is a comprehensive family of tightly integrated applications to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle Sales Family includes:

- Sales Online
- Field Sales Laptop/Palm/Wireless
- TeleSales
- Incentive Compensation
- Partners Online

- Collections

1.2 Oracle Partners Online Product Features

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

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

Major product features are outlined below.

Customer and Contact Management

Oracle Partners Online provides representatives with complete customer information 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.

These additional tasks can be performed within Opportunity Management:

- 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 (using Territory Manager) to assign opportunities to appropriate vendor users.

- Apply user-defined business rules to route opportunities automatically or manually to appropriate partners.

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.

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.

Resource hierarchy can be set up in such a way that partner users roll up into the vendor organization through the channel managers.

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

Service Requests

Partners can create service requests and view those requests from the partner view under the Support tab. In addition, partners can search the knowledge base for solutions to common problems.

Campaign Management

Partners can create marketing development fund requests (in the form of a marketing campaign) to request funding from vendors for various marketing activities.

Quote Management

Oracle Partners Online quote management allows the user (both vendor & partner) to create quotes. The vendor can also create/submit quotes on behalf of their partners.

Lead Management

Vendors are able to create and manage leads. Vendors can convert a lead to an opportunity and route that opportunity to a partner.

My Company

This tab also allows the partner user to maintain company specific information. Partner users can create additional partner contacts by using the "My Contacts" subtab.

Fulfillment (Collateral Requests)

Venders can send collateral to their partners through integration with the Oracle CRM Foundation One-to-One Fulfillment module.

Oracle Incentive Compensation

Integration with Oracle Incentive Compensation allows partners to be set up in a resource hierarchy, so that channel managers can assign quotas to partner users. Partner users can provide feedback to channel managers for quota planning as well as accept quota allotments online.

Marketing Encyclopedia Integration

Through integration with Oracle Marketing Encyclopedia, sales and marketing professionals can organize corporate information into categories and channels for use. Users can set up groups to swiftly publish content to other 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 HRMS on the vendor side, as well as to create and maintain agent and group profiles for the vendor or partner.

Territory Manager

Territory Manager allows the sales and vendor users (assignment managers) to easily define territory groups and assign resources to the territory. Territory

Manager provides the means to administer vendor user (assignment manager) territories and accounts, as well as view the hierarchy of territory groups, specific territories, and the people associated with them and their accounts.

Partner Profile Management

Oracle Partners Online provides a framework which allows a vendor to define a variety of profile attributes to capture and track partner profile details. This information is then used to assign opportunities to appropriate partners.

Partner Matching

Oracle Partners Online provides automatic and manual partner matching mechanisms. During the matching process, opportunity details are matched with partner profiles (based on user defined business rules) to identify the best partner to work on the opportunity.

Partner Opportunity Assignment/Routing Options

Indirect sales opportunities can be routed to partners, using the following routing options:

- **Single assignment routing:** The opportunity is offered to the first (top ranked) partner identified during the partner matching process.
- **Serial assignment routing:** The opportunity is offered in succession from the partner ranked highest to the partner ranked lowest. This process continues, until an assigned partner accepts the opportunity.
- **Broadcast assignment routing:** An opportunity is offered to all of the partners that are identified during the partner matching process. The first partner to accept the opportunity, gets to work on it.
- **Joint Selling:** The opportunity is offered to all of the partners identified during the partner matching process. Multiple partners can accept the opportunity and work on it jointly.

The assignment manager has the option to initiate the opportunity routing to partners by bypassing the channel manager's approval. If this option is not selected, the channel manager needs to approve the opportunity assignment before the opportunity is offered to the partner.

Partner Review and Processing

Partner review and processing allows the partners to review, accept and update the opportunities sent to them by the assignment or channel manager. If a partner chooses to decline the opportunity, then it is passed to the next matched partner in the process.

Workflow and Email Alerts

Through Oracle Workflow, Oracle Partners Online increases both vendor and partner efficiency by automatically updating routing statuses and automatically routing opportunities to and from various parties. Oracle 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 vendor user (channel manager) time-out period for processing the opportunity has expired.
- Automatic routing of opportunities to assigned partners for the various assignment options are:
  - Single
  - Serial
  - Broadcast
  - Joint Selling
- Automatic routing status is updated after the matching process has occurred.

1.3 Tab Access

User functionality (Vendor, Partner and VAD) for Oracle Partners Online is organized into the following tabs:

- Home
- Calendar
- Fund Request
- Leads (Vendor Only)
- Opportunity
- Quote
- Forecast
- Customer
- My Company (VAD & Partner Only)

- Partner (VAD & Vendor Only)
- Service
- Compensation
- Fulfillment
- Encyclopedia
- Administration (Vendor Admin and VAD Admin)

2

Technology, Requirements, and Performance

This chapter discussed the architectural requirements for Oracle Partnes Online and includes the following topics:

- Architectural Overview

2.1 Architectural Overview

Oracle Partners Online is built on the following 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 1.2
- Jdeveloper - BC4J version 3.2.3.102
- MS Internet Explorer, version 5.5 or later. This is the recommended browser for all HTML-based applications.
- Netscape Navigator, version 4.5
- Oracle Workflow 2.5, embedded in Oracle applications.

3

Dependency Requirements and Verification

This chapter discusses the mandatory and conditional dependencies Oracle Partners Online has on other products and components and includes the following topics:

- Mandatory Dependencies
- Conditional Dependencies
- Installation and Dependency Verification

3.1 Mandatory Dependencies

Oracle Partners Online requires the following related products and components to be installed and implemented:

Oracle CRM Foundation Components:

- Resource Manager, Interaction History, Notes Manager, Tasks Manager, Territory Manager, One-to-One Fulfillment and Marketing Encyclopedia.

Oracle Sales Online

- The entire application must be installed and implemented.

Oracle ERP Applications:

- HRMS, Inventory, Order Management, and Accounts Receivable.

3.2 Conditional Dependencies

The following applications provide desired functionality to the product but are not required for the application to function:

- Oracle Incentive Compensation
- Oracle Marketing Online
- iStore HTML Quoting
- iSupport

3.3 Installation and Dependency Verification

Prior to the implementation of Oracle Partners Online you must:

1. Verify that Oracle E-Business Suite Enterprise database has been properly installed. If not, then install the database according to the procedure described in Oracle E-Business Suite installation documentation.
2. Verify that Oracle Partners Online 11i has been properly installed.

Complete installation and implementation steps as outlined in the following documents:

- *Installing Oracle Applications*
- *Oracle Applications Supplemental CRM Installation Steps*
- *Oracle System Administrator's Guide*

4

Implementation Overview

This chapter provides an overview of the Oracle Partners Online implementation process and includes the following topics:

- Process Description
- Implementation Task Sequence

4.1 Process Description

The steps necessary to successfully implement Oracle Partners Online are listed in the order in which they should be carried out. If a step includes steps performed in another application such as Oracle CRM Application Foundation, the relevant implementation guide is referenced.

The following steps outline the necessary requirements to successfully implement Oracle Partners Online.

Steps

1. Set up Oracle Sales Online.
2. Create internal organizations.
3. Set up system profiles.
4. Set up registration.
5. Set up time-outs.
6. Set up Status notifications.
7. Set up attribute types.
8. Set up attribute values.

9. Set up the Channel Marketing Manager
10. Set up channel types.
11. Set up Oracle Marketing Online.
12. Set up Oracle Incentive Compensation.
13. Set up Oracle iSupport.
14. Run concurrent programs.

4.2 Implementation Task Sequence

The table below details the step by step tasks needed to implement Oracle Partners Online.

Mandatory	Steps	Oracle Partners Online Implementation Tasks
Yes	Step 1	**Oracle Sales Online Set ups.** *(See Oracle Sales Online Implementation Guide, Release 11i.)* **Create the following:** ▪ Roles ▪ Groups ▪ Employees ▪ User Details ▪ Resource Imports ▪ Locations **Set up the following:** ▪ Opportunity and Forecasting ▪ HTML Quoting Management ▪ Note Types and Map to Source ▪ Territory Management ▪ Task Manager ▪ Lead Management ▪ Interaction History ▪ Fulfillment ▪ Opportunity Exchange
Yes	Step 2	Create Internal Organization

Mandatory	Steps	Oracle Partners Online Implementation Tasks
Yes	Step 3	Set up System Profiles
Yes	Step 4	Set up Registration
Yes	Step 5	Set up Time-Outs
Yes	Step 6	Set up Status Notification
Yes	Step 7	Set up Attributes Types
Yes	Step 8	Set up Attribute Values
Yes	Step 9	Set up Channel Marketing Manager
Yes	Step 10	Set up Channel Type Screen
Yes	Step 11	*See Oracle Marketing Online Implementation Guide, Release 11i* Set up profiles in **Oracle Marketing Online.** ■ Campaigns ■ Budgets ■ Approvals ■ Schedules ■ Activities
Yes	Step 12	*See Oracle Incentive Compensation Implementation Guide, Release 11i* Set up profiles for **Oracle Incentive Compensation.** ■ Sales Compensation Roles and Responsibilities ■ Plan Element Mapping

Mandatory	Steps	Oracle Partners Online Implementation Tasks
Yes	Step 13	*See Oracle iSupport Implementation Guide, Release 11i* Set up profiles for **Oracle iSupport.** ■ Request Type ■ Status ■ Severity ■ Contact ■ Owner ■ Customer ■ Product Association (The products that they are referring to could be products that either the vendor, partner or End User is selling.) ■ Knowledge Management ■ Email Submission (Mandatory, if the customer wants the email confirmation feature.) ■ Disable Menu Option (No Set up Required) ■ Summary (No Set up Required)
Yes	Step 14	Run Concurrent Programs Territory Manager PV Refresh Attribute Text Table PV Unassigned Opportunity Process After Timeout Workflow Background Process

5

Implementation Tasks

This chapter outlines the steps necessary to succesfully implement Oracle Partners Online, and includes the following topics:

5.1 Set up Oracle Sales Online

Refer to *Oracle Sales Online Implementation Guide* for instruction about setting up the necessary parameters for using this application.

Prerequisites

Log in with System Administrator responsibilities.

Steps

The following areas must be set up within Oracle Sales Online (as well as Oracle iSupport, HRMS, and Foundation) in order to ensure that the tabs associated with these setups within Oracle Partners Online will function properly.

Create the following:

- Roles
- Groups
- Employees
- User Details
- Resource Imports
- Locations

Set up the following:

- Opportunity and Forecasting
- Opportunity Exchange
- HTML Quoting
- Note Types and Map to Source
- Territory Management
- Task Management
- Lead Management
- Interaction History
- One to One Fulfillment Create Internal Organization

Prior to the creation of partners, internal organizations must be created. This will enable the vendors to connect new partners to individual internal organizations.

Follow the steps below to create an Internal Organization:

Prerequisites

Log in as the Vendor User/Administrator and navigate to the following:

Customer > Organization Subtab > Create Link

Steps

1. Select the Customer tab.
2. Click Create Customer.
   - Enter the required details and select the internal option (Link) under organization.

5.2 Set up System Profiles

Oracle applications allow the user to set profiles according to your company's business requirements.

Responsibilities: Define the tabs, subtabs and links the user can access.

Profiles: Define more detailed access rights, such as giving the user view/modify access to a particular section, field or checkbox.

Profile level symbols indicate:

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

System profiles can be set for four different levels of access:

- **Site:** Indicates that the profiles are set at the site level. This site level setting affects the entire database.
- **Application:** Indicates that the profiles are set at the application level. When a profiles are set at this level, it overrides the site level.
- **Responsibility:** Indicates that the profiles are set at the responsibility level. The responsibility level settings affects users of a given responsibility. When profiles are set at this level, it overrides both the site and application levels.

- **User:** This setting affects individual users. When set, it overrides settings at the site, application and responsibility levels.

The table below describes Oracle Partners Online system profiles and indicates the profile levels for site, application, responsibility and the user.

Prerequisites

Log in with Systems Administrator responsibilities and navigate to the following

Forms >

Enter sysadmin for user id and password.

From the select responsibility link, choose System Administrator.

An asterisk **(*)** after a profile name indicates that the user can set the **p**rofile in the personal profiles section of Oracle Partners Onlin**e.**

Functional Areas	Profile name	Profile level	Profile Description	Default Value
Administration	PV: Expose Responsibility to Partner	R	Determines whether or not to expose a particular Responsibility type to partners. When set to partner this means that this responsibility can be assigned to a partner contact. This profile can also be used with customized responsibilities.	Partner
MDF	PV: Default MDF Program	S	Default roll-up program for MDF requests. This must be updated in order for campaigns to roll-up correctly at a trancsactional level. The user can change this default value.	<enter program name>
MDF	AMS: Default Budget for Partner	SARU	This profile is used to default the budget id while creating a fund request in the MDF module.	None

Opportunity	PV: Default Batch assignment user	S	This user will be the assignment manager for opportunities routed by the concurrent program, "PV Unassigned Opportunity Process after Timeout." Also see PV: Default Unassigned Opportunity Timeout	LOV
Opportunity	PV: Default Vendor User (Channel Mgr.)	R	This is the catch-all person for opportunities where named channel managers can not be found. Default CM gets added to the sales team with full access to view opportunity detail, and receives routing workflow notifications, i.e. to approve partner match.	LOV
Opportunity	PV: Default CM TimeOut	S	Sets the time period (in hours) available to CMs to review and approve partner match/selection. If the CM does not respond within the timeout period, the default response as recognized by the system in "match approved".	<enter a number>
Opportunity	PV: Default Partner TimeOut	S	Sets the time period (in hours) available to partner contacts to accept the offered opportunity. If the partner contact does not respond within the timeout period, the default response as recognized by the system is "offer declined".	<enter a number>

Opportunity	*PV: Default Routing Type	SARU	Default routing type is used when one is not specified in opportunity routing. In addition, during automatic routing by campaign, the system will route based on this routing type selection. Also used in Submit Routing UI to automatically default routing type. User can always change this before submitting.	SINGLE
Opportunity	PV: Default Unassigned Opportunity TimeOut	S	Default unassigned opportunity time-out tracks the maximum number of days an opportunity is allowed to stay in the"Unassigned" routing status. When the time-out expires, a batch program will automatically start, assign best-matched partners, and route the opportunities to those partners.	<enter no.of days>
Opportunity	PV: Display Submit Routing Button	SARU	Grant selected vendor/vad users the ability to route opportunities to partners. When set to yes, a"Submit Routing" button is displayed inside the partner channel screen in the opportunity module. This profile is available for the vendor and vad users but is unavailable to partner users.	NO

Opportunity	PV: Enable Automatic Routing by Campaign	R	Enable automatic routing based on campaigns. When campaign field is entered, system will find and add the associated partners to sales team, opportunity routing list, and start the routing process. The partner information comes from Oracle Marketing Online.	NO
Opportunity	PV: Enable Workflow to send Emails	R	Enable workflow to send email notifications to vendor users (CMs), partner contacts, and other members of the sales team during opportunity routing. When set to"Yes", emails are sent. When set to"No", workflow will not send emails. To determine who should receive emails, the HTML set up screen is available in the application under the Administration module, Status Notification link.	YES
Opportunity	*PV: Max Number of Matched Partners	SARU	Set the maximum number of best-matched partners to be displayed in the matching result screen.	<enter a number>
Opportunity	PV: Require CM Approval for Campaign Routing	R	Determine whether CM approval is required for partners matched by campaign. This profile should be used in conjunction with PV: Enable Automatic Routing by Campaign	NO

Opportunity	PV: Require Vendor User (CM) Approval for Manual Routing	R	Determine the display of the bypass channel manager approval flag. When set to"Yes", this flag is not displayed. When set to"No", this flag is displayed to provide user with the option to bypass CM approval or not bypass for each opportunity. Bypass CM approval means that CM does not need to approve the partner match/selection, and the opportunity is directly routed to partner contacts for review and approval.	YES
Opportunity	PV: Require Opportunity Contact for Manual Routing	R	Check to see if any customer contact name is provided in the opportunity. When set to"Yes", contact name is mandatory in order for manual and batch routing to start (i.e. not required for Campaign routing). When set to"No", contact name is not required for manual routing.	NO

Opportunity	PV: Java Class to Restrict ORG Access Privilege	S	Customizable Java Class logic is available to restrict Partner/VAD users from accessing customer detail information when navigating from opportunity screens, i.e. by clicking on the customer hyperlink. A default logic is provided that checks to see if the user is on the ORG sales team for this customer before granting access. This logic can be easily modified and recoded. For example, access can be granted to everyone in a company organization.	<Java class file name>
Opportunity	PV: System Login URL	S	Enter the system login URL to be displayed in all email notifications.	<enter URL>
Partner	PV: Restrict Sales Team Partner Contact LOV	S	Determine whether to restrict the partner contact LOV in sales team. When set to"Yes," this shows Partner Contact of partners where Partner User is on the sales team.	YES
Partner	PV: Default Vendor Organization	SARU	Select the Vendor Organization to be used in establishing partner relationships. To set up the vendor organization, check the"Internal Org" flag in the Organization Detail Main screen.	<select an internal org>
Partner	PV: Enable Exchange Partner Flag	SARU	Enable the exchange partner flag to be displayed in the partner profile screen.	YES

Partner	PV: Enable Sales Partner Flag	SARU	Enable the sales partner flag to be displayed in the partner profile screen.	YES
Partner	PV: LOV Access Privilege	S	Set the desired access privilege for the following list of values:"Add Partner Contact" in opportunity. Vendor User (Channel Mgr) and"Secondary Support Person" in partner profile."ACCESS" means to show the LOV only for the organizations that I'm on the sales team for."ALL" means to show all resources available."My" means to show only My Company's resources.	My
Partner	PV: Maximum Users	S	Maximum number of users a partner can have.	100
Opportunity	*PV: Unassigned notification flag	U	This setting determines whether the user wishes to receive e-mail for a new unassigned opportunity	Yes
Opportunity	*PV: Matched notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity is matched.	Yes
Opportunity	*PV: Offered notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes in status from matched to offered.	Yes

Opportunity	*PV: Withdrawn notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes in status from offered to withdrawn.	Yes
Opportunity	*PV: Recycled notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when approval for an opportunity match is declined by all Vendor Users (channel managers).	Yes
Opportunity	*PV: Active notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes routing status to active.	Yes
Opportunity	PV: Abandoned notification flag	S	This setting determines whether the user wishes to receive an e-mail notification when a partner abandons an opportunity.	Yes
Registration	*PV: Use User Management	S	To use JTF user management framework for registration	Yes

5.3 Oracle Partners Online Profile Options

Below are profile values for the following profiles:

OS: Customer Access Privilege AS_CUST_ACCESS

OS: Opportunity Access Privilege AS_OPP_ACCESS

These options must be set to "Sales Team" for the following PV responsibilities:

1. VAD Admin
2. VAD User

3. Partner Admin
4. Partner User

5.4 Oracle Partners Online Dependent Product Profile Options

The following are profile options for dependent products of Oracle Partners Online:

Oracle Sales Online: 100% of OSO Profile Options must be set up. Refer to *Oracle Sales Online Implementation Guide, Release 11i.*

Oracle MES (Marketing Encyclopedia System): Set up profiles options in Oracle Sales Online. Refer to *Oracle Sales Online Implementation Guide, Release 11i.*

Oracle HTML Quoting: Profile options for Quoting can be found in the *HTML Quoting Implementation Guide, Release 11i.*

Oracle Marketing Online: The following profile options must be set up for OMO. Refer to *Oracle Marketing Online Implementation Guide, Release 11i.*

- Campaigns
- Schedules
- Budgets
- Approvals
- Activities

Oracle Incentive Compensation: The following profile options must be set up for OIC. Refer to *Oracle Incentive Compensation Implementation Guide, Release 11i.*

- Request Type
- Status
- Severity
- Contact
- Owner
- Customer
- Product Association
- Knowledge Management
- E-Mail Submission

Oracle iSupport: The following mandatory profile options must be set up within iSupport. Refer to *Oracle iSupport Implementation Guide, Release 11i.*

- Item Flexfield (Service)
- Item Flexfield (Product)
- Default new Note Type in Workbench Tab
- Service Request Default Tab
- Default web service request owner
- Default web service request severity
- Default web service request type
- Default web service request urgency

5.5 How to Set up Registration

The following topics will describe how to set up registration.

5.5.1 Create a Guest User

Prerequisites

Log in as Systems Administrator and navigate to the following:

Users > Set up Subtab > User Types Link

Steps

1. Click **Register Here** on the application login page.
2. Choose the Individual user.
3. Fill in details for a guest user.
4. Click Submit.

5.5.2 Set up Guest User

Follow the steps below to set up a Guest User.

Prerequisites

Log in as Systems Administrator and navigate to the following:

Setting Tab > System Subtab > Self Service User Link

Steps

1. Fill in guest user details that are created above.
2. Click Update.

5.5.3 Set up Usertype

Use this procedure to set up Usertype.

Prerequisites

Associate user enrollments to Oracle Partners Online internal user usertype

Log in as Systems Administrator and navigate to the following:

Users > Set up Subtab > User Types Link

Steps:

1. Click POL Internal user usertype.
2. Go to Enrollment Section.
3. Set Enrollment Flag = Yes for Enrollment: IBO - Business and IBE Business.
4. Click Next.
5. Repeat steps 1 - 4 for User types Business user, Primary user, Partner User, Partner Admin, VAD user, and VAD Admin.

5.6 Set up Time-Outs

Time-Outs are time periods during which an action is expected to take place. There are two time-out types:

- Channel manager TimeOut
- Partner TimeOut

Channel Manager Time-Out: Limits the time period a channel/assignment manager can hold a matched 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.

Use this procedure to set up TimeOuts.

Prerequisites

Log in as the Systems Administrator and navigate to the following:

Administration > Partner Subtab > Time-Out Link

Steps:

1. Select the time-out type (channel manager or partner).
2. Fill in all required fields.
3. Click Apply.

Guidelines

Set up time-outs in hours, (not days) country and period. The set up window allows time-out periods to vary for different countries. If the time-out is not set for a country, then the default time-out period is used. If only one time-out period is used across sites, the default time-out period can be set up within the Administration tab.

5.7 Set up Status Notification

Oracle Partners Online provides a built-in workflow system that triggers automatic email notifications to certain groups of people (i.e. as determined by the role in the Set up) at different stages in the opportunity and routing process. Notifications get sent out whenever the routing status changes. The status notification set up screen defines who should receive such email notifications.

Note: The system checks for the appropriate email address in User Registration (under administration). This is a mandatory requirement in order for the status notification to work. In addition, while creating users, please ensure the appropriate roles are defined.

Use the following procedure to set up Status Notifications.

Prerequisites

Log in as the Systems Administrator and navigate to the following:

Administration >Partner Subtab > Status Notification Link

Steps:

1. Select the Status type
   - **Opportunity:** Describes the status of an opportunity and who is notified regarding that status.
   - **Routing:** Describes the status of the routing of a particular opportunity, and who is notified regarding that status.
2. Fill in all required fields.
3. Click Apply.

5.8 Set up Attributes

Use Attributes to create and track additional information about a partner and/or an opportunity. Then run partner matching to find the best match.

Attributes are defined during the implementation process. Additional attributes can be added, or removed by the vendor administrator.

Use this procedure to add/remove attributes.

Prerequisites

Log in as Vendor Administrator navigate to the following:
Administration > Partner Subtab > Attributes Link

Steps

1. Enter the attribute from the list of values and the description.
2. Enter the short name (for the attribute) and how this attribute will be displayed.
3. Indicate if partner matching will be enabled.
4. Indicate the match order of the opportunity.

- **Note: Attributes are not limited to the predefined list. Additional attributes can be created through the Administration set up page when logged in as Vendor Administrator.**

Table 5–1 The following table is a summary of the Attributes, Tables/Views and descriptions for External Attributes.

State	**ar_location_values**	**ar_locations_values is an Accounts Receivable"s table where all the locations and segments are available.**
Functional	as_interest_types_v1, as_interest_codes_vl	as_interest_ types_v1 and as_interest_codes_v1 are Sales Online views where the interest and expertise of different companies are stored.
Marketing Program	ams_source_codes, ams_campaigns_v1	ams_source_codes ams_campaigns_v1
Partner Type	fnd_lookup_values	fnd_lookup_values is a generally used lookup table where the values of general lookups are stored. Currently there are two types of Partner Type supported in Oracle Partners Online. The description and meaning of VAD_of and Partner_of are displayed from this table.
Country	fnd_territories_V1	fnd_territories_v1 is a commonly used table across all CRM products to display different various countries called territories in the database shcema.
Industry	fnd_lookup_values	fnd_lookup_values is a generally used lookup table where the values of general lookups are stored. Based on the lookup type, all the different industries are displayed on the screen.

Guidelines (Attributes)

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.

5.9 Set up Attribute Values

Each attribute is accompanied by a list of values. Follow the steps below to set up attribute values.

Prerequisites

Log in as Vendor Administrator and navigate to the following:

Administration > Partner Subtab > Attribute Values Link

Steps

1. Enter Attribute Value.
2. Enter Description.
3. Click Update.

5.10 Set up Channel Marketing Manager

Use this procedure to set up the Channel Marketing Manger. This set up is required for the MDF program to default to the channel marketing manager, based on the partner location.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Channel Marketing Manager Link

Steps:

Add a Channel Marketing Manager:

1. Fill in all required fields.
2. Click Update.

Remove a Channel Marketing Manager:

1. Select the channel marketing manger to be removed.
2. Select the Remove box.
3. Click Update.

5.11 Set up Channel Types

Follow the steps below to set up Channel Types.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Partners Subtab > Channel Types Link

Steps

1. Select the Channel.
2. Indicate if it is an Indirect Sales Channel.
3. Click Update.

5.12 Set up Oracle Marketing Online

The steps for the set up of Oracle Marketing Online are found in *Oracle Marketing Online Implementation guide.*

Prerequisites

Log in with Systems Administrator responsibilities.

Steps

The following areas must be set up in OMO in order to ensure the tabs (associated with Oracle Marketing Online) inside of Oracle Partners Online function properly.

1. Campaigns
2. Budgets
3. Schedules
4. Approvals
5. Activities

5.13 Set up Oracle iSupport

Refer to *Oracle iSupport Implementation Guide* for information about the set up of the necessary parameters for using the Service Request tab within Oracle Partners Online.

Prerequisites

Log in with Systems Administrator responsibilities.

Steps

The following areas must be set up in Oracle iSupport in order to ensure that the Service tab inside of Oracle Partners Online functions properly.

1. Set up Request Type
2. Set up Status
3. Set up Severity
4. Set up Contact
5. Set up Owner
6. Set up Customer
7. Set up Product Association
   - The products that they are referring to could be products that either the vendor, partner or end user is selling.
8. Set up Knowledge Management
9. Set up Email Submission
   - Mandatory if the customer wants the email confirmation feature.
10. Disable Menu Option (No Set up Required)
11. Summary (No Set up Required)

5.14 Set up Oracle Incentive Compensation

Refer to *Oracle Incentive Compensation Implementation Guide* for information about the set up the necessary parameters for using the Compensation tab within Oracle Partners Online.

Prerequisites

Log in with Systems Administrator responsibilities.

Steps

The following areas must be set up in Oracle Incentive Compensation in order to ensure that the Compensation tab inside of Oracle Partners Online functions properly.

1. Set up Sales Compensation Roles and Responsibilities.
2. Set up Plan Element Mapping.

5.15 Concurrent Programs

The following procedures will allow the administrator to run concurrent programs within Oracle Partners Online.

Log in with Systems Administrator responsibilities.

Guidelines

1. Run Territory Manager to identify the assignment Manager's territory.
   - Refer to the Implementing Territory Manager section of the *Oracle CRM Foundation Implementation Guide* for information about setting up territory management.
   - There are two Oracle Partners Online specific roles available in Territory Manager, Channel Manager and Partner Contact.
   - While setting up a partner territory, please ensure that all the channel managers and/or partner contacts added to the territory have their role correctly selected in the Set up.
   - After the territory administrator has completed the territory Set ups as outlined in the *CRM Foundation Implementation Guide,* run the "Generate Territory Package" and "Territory Denormalization Refresh" programs .
2. Run these 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.
   - PV Unassigned Opportunity Process After TimeOut: This program automatically moves opportunities into the matching process for those unassigned opportunities that have been left unassigned more than "n"

days since the opportunity creation date (“n” days is a profile option that can be set at implementation).

- PV Refresh of Partner Opportunity Bin Data: This program refreshes the materialized view used in Home page to display the partner opportunity Bin.

3. Workflow Background Process: This program needs to be scheduled to enable the time-out processing. The following parameters need to be set:

   Item Type = POL assignment routing
   Process Deferred = N
   Process Timeout = Y
   Process Stuck = N

Refer to the *Oracle Applications Vendor Administrator's Guide* for steps 2 and 3.

5.16 Corporate Open/Won Opportunity Bins

Perform the following steps to exclude the view of the corporate open/won opportunities to both the vendor user and administrator. These bins will be visible to the partner users.

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Sales > Home Page Bins

Steps

1. Select the application: Oracle Partner Relationship Management.
2. Select the Responsibility as Vendor User.
3. Select the check box to disable the Corporate Open/Won opportunities.
4. Repeat steps 2-4 for the Vendor Admin responsibility.

5.17 Locator Engine Implementation

The locator engine allows the user to search for Partner/Reseller/VAD that are registered with Oracle Partners Online. The engine is not closely integrated with the application. This allows the customers to integrate the Locator engine with their portal application. In order to make this service available through the portal, a hyperlink needs to be added on the portal.

The hyperlink should point to the machine where Oracle Partners Online is installed and the URL would look like: http://<machine_name>:port_number/OA_HTML/pvxLoctrSearch.jsp. The Locator engine uses the POL database schema to retrieve the Partner/Reseller/VAD information. Please make sure that the POL database is operational. A guest user authentication is used to access the pages from the server.

The Locator engine has two search pages:

The advanced search page displays attributes set up in Oracle Partners Online by using the Admin > Attributes page.

5.17.1 Making Attributes Available for Locator Search

Follow the instructions below to make an attribute available for locator search:

Prerequisites

Log in as the Vendor Administrator and navigate to the following:

Administration > Attributes Page

1. Click the check box in the Locator column for the attribute, that needs to be turned on for the locator search.

Note: The locator flag won't be able to be turned on unless the Partner flag for the attribute is checked. If you create a new attribute or make an attribute available for Locator matching, please bounce the application server. For reasons of performance, all of the attributes used in the Locator engine are cached.

6

Integrating Oracle Partners Online

The following lists displays all products integrated with Oracle Partners Online, as well as the related and additional documentation sources. The set up procedure for each product is described in Chapter 5 (Implementation Tasks) of this guide.

- Oracle Sales Online
- Oracle Marketing Online
- Oracle Incentive Compensation
- Oracle iSupport
- Oracle iStore
- Oracle HRMS
- Oracle CRM Foundations
- Oracle Marketing Encyclopedia
- Oracle Quoting Forms

Note: While setting up Oracle Quoting form, make sure that the salesperson's number and sales credit for the resource are set correctly.

6.1 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 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, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11i.

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 Quoting Forms Concepts and Procedures

This document is a printed compilation of the Oracle Quoting Forms online help system.

Oracle Incentive Compensation Implementation Guide

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

A

System Profiles

Functional Areas	Profile name	Profile level	Profile Description	Default Value
Administration	PV: Expose Responsibility to Partner	R	Determines whether or not to expose a particular Responsibility type to partners. When set to'partner', this means that this responsibility can be assigned to a partner Contact. This profile can also be used with customized responsibilities.	Partner
MDF	PV: Default MDF Program	S	Default roll-up program for MDF requests. This must be updated in order for campaigns to roll-up correctly at a trancsactional level. User can change this default value.	<enter program name>
MDF	AMS: Default Partner Budget	SARU	This profile is used to default the budget ID while creating a fund request in the MDF module.	None

Opportunity	PV: Default Batch assignment user	S	Default batch assignment user is the person who is assigned to opportunities that have been automatically routed using partner Matching. This is a batch program that checks for opportunities that have been in'unassigned' status for more than'n' number of days, runs partner matching to find the best-matched partners, assigns this default user to the Sales Team, and starts the routing. ** Also see PV: Default Unassigned Opportunity TimeOut	LOV
Opportunity	PV: Default Vendor User *(Channel Mgr.)*	R	This is the catch-all person for opportunities where named Channel Mgrs. can not be found. Default CM gets added to the Sales Team with full access to view opportunity detail, and receives routing workflow notifications, i.e. to approve partner match.	LOV
Opportunity	PV: Default CM TimeOut	S	Sets the time period (in hours) available to CMs to review and approve partner match/selection. If the CM does not respond within the timeout period, the default response as recognized by the system in'match approved'.	<enter a number>

Opportunity	PV: Default Partner TimeOut	S	Sets the time period (in hours) available to partner contacts to accept the offered opportunity. If the partner Contact does not respond within the timeout period, the default response as recognized by the system is'offer declined'.	<enter a number>
Opportunity	*PV: Default Routing Type	SARU	Default routing type is used when one is not specified in opportunity routing. In addition, during automatic routing by Campaign, the system will route based on this routing type selection.	SINGLE
Opportunity	PV: Default Unassigned Opportunity TimeOut	S	Default Unassigned Opportunity TimeOut tracks the maximum number of days an opportunity is allowed to stay in the'Unassigned' routing status. When the timeout expires, a batch program will automatically start, assign best-matched partners, and route the opportunities to partners.	<enter no.of days>
Opportunity	PV: Display Submit Routing Button	SARU	Grant selected vendor/VAD User the ability to route opportunities to partners. When set to Yes, a'Submit Routing' button is displayed in the partner Channel screen in the Opportunity Module. This profile is available for the vendor and VAD users; unavailable to partner users.	NO

Opportunity	PV: Enable Automatic Routing by Campaign	R	Enable automatic routing based on campaigns. When campaign field is entered, system will find and add the associated partners to sales team, opportunity routing list, and start the routing process. The partner information comes from Oracle Marketing Online.	NO
Opportunity	PV: Enable Workflow to send Emails	R	Enable workflow to send email notifications to Vendor User (CMs), Partner Contacts, and other members of the Sales Team during opportunity routing. When set to'Yes', emails are sent. When set to'No', workflow will not send emails. To determine who should receive emails, the HTML Set up screen is available in the application under the Administration module, Status Notification link.	YES
Opportunity	*PV: Max Number of Matched Partners	SARU	Set the maximum number of best-matched partners to be displayed in the matching result screen.	<enter a number>
Opportunity	PV: Require CM Approval for Campaign Routing	R	Determine whether CM Approval is required for partners matched by campaign. This profile should be used in conjunction with PV: Enable Automatic Routing by Campaign	NO

Opportunity	PV: Require Vendor User (CM) Approval for Manual Routing	R	Determine the display of the Bypass CM Approval flag. When set to'Yes', this flag is not displayed. When set to'No', this flag is displayed to provide user with the option to bypass CM approval or not for each opportunity. Bypass CM approval means that CM does not need to approve the partner match/selection, and the opportunity is directly routed to partner contacts for review and approval.	YES
Opportunity	PV: Require Opportunity Contact for Manual Routing	R	Check to see if any customer contact name is provided in the opportunity. When set to'Yes', contact name is mandatory in order for manual and batch routing to start (i.e. not required for Campaign routing). When set to'No', contact name is not required for manual routing.	NO

Opportunity	PV: Java Class to Restrict ORG Access Privilege	S	Customizable Java Class logic is available to restrict users from accessing Customer detail information when navigating from Opportunity screens, i.e. by clicking on the customer hyperlink. A default logic is provided that checks to see if the user is on the ORG sales team for this customer before granting access. This logic can be easily modified and recoded. For example, access can be granted to everyone in a company Organization.	<Java class file name>
Opportunity	PV: System Login URL	S	Enter the system login URL to be displayed in all email notifications.	<enter URL>
Partner	PV: Restrict Sales Team partner Contact LOV	S	Determine whether to restrict the Partner Contact LOV in Sales Team. When set to'Yes', this requires Partner ORG to be added first.	YES
Partner	PV: Default vendor Organization	SARU	Select the Vendor Organization to be used in establishing partner relationships. To Set up vendor organization, check the'Internal Org' flag in the Organization Detail Main screen.	<select an internal org>
Partner	PV: Enable Exchange partner Flag	SARU	Enable the Exchange partner flag to be displayed in the partner profile screen.	YES
Partner	PV: Enable Sales partner Flag	SARU	Enable the Sales partner flag to be displayed in the partner profile screen.	YES

Partner	PV: LOV Access Privilege	S	Set the desired access privilege for the following list of values:'Add Partner Contact' in Opportunity. Vendor User (Channel Mgr) and'Secondary Support Person' in partner Profile.'ACCESS' means to show LOV only for the organizations that I'm on the Sales team for.'ALL' means to show all resources available.'My' means to show only My Company's resources.	My
Opportunity	*PV: Unassigned notification flag	U	This setting determines whether the user wishes to receive e-mail for a new unassigned opportunity	Yes
Opportunity	*PV: Matched notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity is matched.	Yes
Opportunity	*PV: Offered notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes in status from matched to offered.	Yes
Opportunity	*PV: Withdrawn notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes in status from offered to withdrawn.	Yes

Opportunity	*PV: Recycled notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when approval for an opportunity match is declined by all Vendor Users (channel managers).	Yes
Opportunity	*PV: Active notification flag	U	This setting determines whether the user wishes to receive an e-mail notification when an opportunity changes in status to active.	Yes
Registration	*PV: Use User Management	U	To use JTF user management framework for registration	Yes

B

Concurrent Programs

The following procedures will allow the systems administrator to run the concurrent programs within Oracle Partners Online.

Log in with Systems Administrator responsibilities.

Guidelines

1. Run Territory Manager to identify the assignment Manager's territory.
   - Refer to the Implementing Territory Manager section of the *Oracle CRM Foundation Implementation Guide* for information about setting up territory management.
   - There are two Oracle Partners Online specific roles available in Territory Manager, Channel Manger and Partner Contact.
   - While setting up a partner territory, please ensure that all the channel managers and/or partner contacts added to the territory have their role correctly selected in the Set up.
   - After the territory administrator has completed the territory Set ups as outlined in the *CRM Foundation Implementation Guide* and has run the Generate Territory Package and Territory De Normalization Refresh, then run Assign Territory Access.
2. Run these 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.
   - PV Unassigned Opportunity Process After TimeOut: This program automatically moves opportunities into the matching process for those unassigned opportunities that have been left unassigned more than "n"

days since the opportunity creation date (“n” days is a profile option that can be set at implementation).

- PV Refresh of Partner Opportunity Bin Data: This program refreshes the materialized view used in home page to display the partner opportunity bin.

3. Workflow Background Process: This program needs to be scheduled to enable the time-out processing. The following parameters need to be set:

   Item Type = POL assignment routing
   Process Deferred = N
   Process Timeout = Y
   Process = N

Refer to the *Oracle Applications Vendor Administrator's Guide* for steps 2 and 3.

C
Lookups

PV_ ASSIGNMENT	SITE LEVEL		Opportunity Assignment Statuses
	ASSIGNED	Matched	
	CM_ADDED	Channel Manager Added Partner	
	CM_ADD_APP_FOR_PT	Channel Manager Add and Approve for Partner	
	CM_APPROVED	Match Approved	
	CM_APP_FOR_PT	Channel Manager Approved for Partner	
	CM_BYPASSED	Channel Manager Bypassed	
	CM_REJECTED	Match Rejected	
	CM_TIMEOUT	Match Timed Out	
	LOST_CHANCE	Opportunity Accepted by another Partner	
	MATCH_WITHDRAWN	Match Withdrawn	
	OFFER_WITHDRAWN	Offer Withdrawn	
	PT_ABANDONED	Partner Abandoned	
	PT_APPROVED	Offer Accepted	
	PT_CREATED	Partner Created	
	PT_REJECTED	Offer Rejected	
	PT_TIMEOUT	Offer Timed Out	
	UNASSIGNED	Unassigned	

PV_ ASSIGNMENT_ TYPE	SITE LEVEL		Opportunity Assignment Types
	BROADCAST	Multiple - Parallel	
	JOINT	Joint	
	SERIAL	Multiple - Serial	
	SINGLE	Single	
PV-ATTR_ ENTITY_TYPE	SITE LEVEL		Entity Types for Entity_Attrs
	LEAD	Opportunity	
	PARTNER	Partner	
PV_ATTR_ MATCH_TYPE	SITE LEVEL		PV Attribute Matching Type
	BOTH MANUAL RECOM	Both Manual Recommended	
PV_ATTR_ VALUE_SETUP	SITE LEVEL		Attribute Value Setup in POL
	DONE	Done	
	NOT_REQUIRED	Not Required	
	REQUIRED	Required	
PV_CM_ ASSIGNMENT_ RESPONSES	SITE LEVEL		PRM Channel Manager Valid Responses
	CM_APPROVED	Approve	
	CM_REJECTED	Reject	
PV_DATA_ SOURCE	SITE LEVEL		PV Attribute Data Source
	EXTERNAL	External	
	INTERNAL	Internal	
PV_ITEM_STYLE	SITE LEVEL		Item style for Entity_ Attrs
	DROPDOWN	Dropdown	
	TEXT	Text	

PV_NOTIFICATION_TYPE	SITE LEVEL		Various Notification Types
	ABANDONED_BY	Partner Abandoned	
	BEHALF_OF	Channel Manager Acted on behalf of Partner	
	MATCHED_TO	Channel Manager Matched	
		Partner Contact Offered	
	OFFERED_TO	CM Notified when partner created	
	OFFRD_RSLT_CC		
	PTCR_FYI	Lead/Opportunity	
	STCHG_FYI	AM/CM/Partner/Others notified	
PV_OBJECT_NAME	SITE LEVEL		Lookup used in pv_lead_pss_lines API
	CAMP	Campaign	
	LEAD	Sales Lead	
	OPPORTUNITY	Opportunity	
	PRTNR	Partner	
PV_OPPORTUITY_SOURCE_TYPE	SITE LEVEL		Various Source Type of Opportunity
	CAMPAIGN	Campaign	
	MATCHING	Matching	
	SALESTEAM	Salesteam	
	TAP	TAP	

PV_REASON_CODES	USER LEVEL		PRM Reason codes for declining, withdrawing an oppty
	CHANNEL_CONFLICT	Channel Conflict	
	INADEQUATE_RESOURCE	Inadequate Resource	
	INDUSTRY_MISMATCH	Industry Mismatch	
	OTHER	Other	
	RESOURCE_ISSUE	Resource Issue	
	SOLUTION_MISMATCH	Solution Mismatch	
	TECHNICAL_PLATFORM_ISSUE	Technical/Platform Issue	
	TIMESCALE_ISSUE	Timescale Issue	
PV_RESOURCE_RESPONSE	SITE LEVEL		Response of the resource
	CM_ADDED	Channel Manager Added	
	CM_APPROVED	Channel Manager Approved	
	CM_REJECTED	Channel Manager Rejected	
	CM_TIMEOUT	Channel Manager Time-out	
	PT_APPROVED	Partner Accepted	
	PT_CREATED	Partner Created	
	PT_TIMEOUT	Partner Time-out	
PV_ROUTING-STAGE	SITE LEVEL		Routing Status
	ABANDONED	Abandoned	
	ACTIVE	Active	
	MATCHED	Matched	
	OFFERED	Offered	
	RECYCLED	Recycled	
	UNASSIGNED	Unassigned	
	WITHDRAWN	Withdrawn	

PV_SOURCE_ COLUMN	SITE LEVEL		Allowed values for Source Column
	ATTRIBUTE_ID	Attribute Id	
	LEAD_ID	Opportunity Id	
	PARTY_ID	Party Id	
PV_STATUS_ TYPE	SITE LEVEL		All the status types used in PRM (Admin-> Status Code)
	LEAD	Lead	
	OPPORTUNITY	Opportunity	
	ROUTING	Routing	
PV_TIMEOUT_ TYPE	SITE LEVEL		Country Time-out Types
	ACTIVE_ TIMEOUT	Active Time-out	
	MATCHED_ TIMEOUT	Channel Manager Time-out	
	OFFERED_ TIMEOUT	Partner Time-out	
	SERIASTALE_ TIMEOUT	Stale Period Time-out	
PV_ WORKFLOW_ STATUS	SITE LEVEL		Valid Status of workflow
	CLOSED	Closed	
	OPEN	Open	
PV_ACCESS_ MODE	SITE LEVEL		PV User Access Mode
	ACCESS	Access	
	ALL	All	
	MY	My	
PV_MDF_USER_ TYPE	SITE LEVEL		User Type for MDF
	USER	User	
PV_ORIG_ SYSTEM_ REF-TYPE	SITE LEVEL		PV Original System Reference Type
	LEAD_ EXCHANGE	Lead Exchange	
	OTHERS	Others	
PV_PURCHASE_ METHOD	USER LEVEL		PV Purchase Method
	DIRECT	Direct	
	INDIRECT	Indirect	

PV_SEARCH_ CATEGORIES	SITE LEVEL		PRM User Types
	PV_CNTCT	Person	
	PV_EMAIL	E-Mail	
	PV_LEAD	Lead	
	PV_MDF	Campaigns	
	PV_OPPTY	Opportunity	
	PV_ORGZN	Organization	
	PV_PRTNR	Partner	
	PV_PRTNR_ CNTCT	Partner Contact	
	PV_PRTNR_MDF	Funds	
	PV_PRTNR_USER	Partner User	
	PV_RELAT	Contacts	
	PV_SERVICE_ REQ	Service Requests	
	PV_TASKS	Task	
PV_USER_TYPES	USER LEVEL		PRM User Types
	CM	Channel Manager	
	LAM	Assignment Manager	
	PT	Partner Contact	
	SR	Sales Rep.	
AMS_SYS_ARC_ QUALIFIER	USER LEVEL		AMS_SYS_ARC_ QUALIFIER
	MAIN	Main	
	PRTCH	Partner Channel	
	NOTES	Notes	

Glossary

Broadcast assignment

In this routing assignment option, the assignment manager assigns an opportunity simultaneously to multiple partners, and whoever accepts the opportunity first is the partner that will receive the opportunity.

Channel Manger TimeOut

A time-out 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, the vendor usually assigns a channel manager to build and maintain a good partner relationship.

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, or 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.

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. Contacts for one partner organization can be on a sales team for one partner organization.

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.

Partner Rank

During the partner matching process, partners returned from the selections criteria are ranked based on the score returned by the Oracle context server search.

Partner TimeOut Period

Partner time-out 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. These time frames are user-defined and supported by Oracle Workflow through automatic emails, notifications, and opportunity status changes.

Profiles

Determines which functions (within the application) the user or administrator can control and/or perform.

Responsibility

Allows Users (Vendors, Partners and VADs) access to the application for various tasks that are tied to their duties either as a user or as an Administrator.

Secondary Phone Support

Secondary support person for the partner, sometimes from the vendor's Call Center.

Serial assignment

In this routing option, assignment manager 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 and rejected the offer.

Single assignment

In this routing option, assignment manager assigns one opportunity only to the top ranked partner.

Value Added Distributor/VAD

A partner who purchases from the vendor and resells to other resellers or to the end customer. They 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).

Vendor User

Channel Manager/CM and Assignment Manager/AM.

Assignment Manager:

The 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, the front end of the process.

Channel manager:

The vendor side role that owns and manages the channel relationship between the vendor and the partner, manages and distributes information to the partners, assigns opportunities to either specific named partners or other partners to a territory that is defined by geography, product category, industry vertical or other categories.