# Oracle® Partners

Implementation Guide

Release 11*i*

**Part No. B10597-01**

March 2003

ORACLE®

Oracle Partners Implementation Guide, Release 11*i*

Part No. B10597-01



Primary Author: Neelam Singh

Contributors: Lynn Ahmad, Bhushan Deodhar, David Hii, Ravi Mikkilineni, Nicole Niner, Francesca Noli, Brian Oden, Narasimha Ramu, Thomas Soohoo, Gerry Spoor, Thennavan Subbiah, Srikanth Veeravelli, Ramana Yellapu

# Contents

# Send Us Your Comments

**Oracle Partners Implementation Guide, Release 11*i***

**Part No. B10597-01**

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). You can send comments to us at:

Oracle Corporation
Oracle Partners Documentation
Street Address, Mailstop
500 Oracle Parkway
Redwood Shores, CA 94065
USA

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

## Intended Audience

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

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

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

  If you have never used Oracle Partners, Oracle suggests you attend one or more of the Oracle Partners 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 understand and use Oracle Partners.

- Chapter 1 provides a brief introduction to Oracle Partners and also highlights the key features and new features of Oracle Partners.
- Chapter 2 provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Partners.

- Chapter 3 provides general information regarding basic concepts used during implementation.
- Chapter 4 provides information regarding attributes used during implementation.
- Chapter 5 provides information on how to search for a partner manually while trying to route an opportunity to the partner.details user setup.
- Chapter 6 provides information on how to match partners using the partner matching engine.
- Chapter 7 provides information on how to implement the locator engine.
- Chapter 8 provides information on how to route an opportunity to a partner.
- Chapter 9 provides information on how to setup Oracle iSupport.
- Chapter 10 provides information on how to setup program profiles.
- Chapter 11 provides information on how to setup enrollment profiles and enrollment approvers.
- Chapter 12 provides a list of products integrated with Oracle Partners.
- Chapter 13 provides information that is useful in verifying the implementation of Oracle CRM Application Foundation modules.

## 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.

## 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.

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 Oracle*MetaLink*.

### Related Documentation

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

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(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

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

### Reference Documentation

Installing Oracle Applications, Release 11*i*

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

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

Oracle Applications Product Update Notes, Release 11*i*

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

Oracle Applications System Administrator's Guide

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

Oracle Applications User's Guide

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

### Additional Product-Related Documentation

Supplemental CRM Installation Steps

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

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

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

Oracle CRM Foundation Technical Reference Manual

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

Oracle Marketing Encyclopedia Concepts and Procedures

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

Oracle 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.

## 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.

### Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release

10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

#### Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, 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.

#### Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

#### Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

### Other Implementation Documentation

#### Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Partners. This manual details additional steps and setup considerations for implementing Oracle Partners with this feature.

### Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Partners with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Partners.

### Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

### Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

### Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

### Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

### Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Partners 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 Oracle*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 Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11*i*.

### 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 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 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.

# Part I

## Getting Started

This section contains the following chapters:

# 1 Introduction

This chapter provides information on the following topics:

- Section 1.1, "The Oracle E-Business Suite"
- Section 1.2, "Oracle Partners Overview"
- Section 1.3, "New in this Release"

## 1.1 The Oracle E-Business Suite

The Oracle E-Business Suite is a comprehensive Web-based answer for business-to-business (B2B) and business-to-consumer (B2C) selling, marketing, and servicing through the Internet. The Oracle E-Business Suite is designed to transform traditional businesses into E-Businesses and consists of front-office Customer Relationship Management (CRM) applications and back-office Enterprise Resource Planning (ERP) applications. These applications automate marketing, sales, contracts, service, manufacturing, and supply chain processes as well as financial operations, project management, human resources operations, and business intelligence systems.

The Oracle E-Business Suite sits on a multi-layer platform which includes:

- Oracle 9*i* Database
- Oracle 9*i* Application Server
- Common Services and Components
- Oracle Internet Business Intelligence

### Oracle 9*i* Database

All applications reside on the Oracle9*i* Database. The Oracle database drives enterprise E-Business applications, online transaction processing applications (OLTP), query-intensive data warehouses, and high capacity Web sites. Because the Oracle database is available on many different platforms, applications can scale from handheld to laptop to desktop to enterprise providing consistent information over multiple channels.

### Oracle 9*i* Application Server

The Oracle 9*i* Application Server (Oracle 9*i*AS) is a middle-tier server which independently delivers the technology needed to build Web sites and applications, create personalized portals, extract business intelligence, and manage a secure Web site infrastructure.

### Common Services and Components

All the applications can leverage the common infrastructure and services components. Functionality includes Oracle Forms, Oracle Reports, Oracle Application Object Library (AOL), the Oracle JDeveloper and Oracle Discoverer development tools, the coding and UI standards, and other functionality used by the applications.

For example, you can extend the applications according to your business needs using flexfields. You can create and assign responsibilities using the system administrator responsibility. Also, you can use Oracle Workflow to configure background processes and set up notifications so that all the appropriate managers and groups are notified.

### Oracle Internet Business Intelligence

Above the E-Business Suite sits the Internet Business Intelligence application. This application integrate data from all of the E-Business Suite applications to provide key performance measurements, operating alerts, and management reports to every decision maker across the enterprise.

## 1.1.1 The Applications in the E-Business Suite

Customers can seamlessly share data from front-end applications (CRM) to backend applications (ERP). The CRM applications include:

- Marketing suite
- Sales suite

- Contracts suite
- Service suite
- eCommerce suite

The ERP applications include:

- Oracle Order Management
- Oracle Supply Chain Planning
- Oracle Manufacturing
- Oracle Financials
- Oracle Human Resources Management System

### Customer Relation Management (CRM)

Companies use Oracle's CRM suite of applications to acquire, maintain, and enhance customer relationships, by assisting companies with marketing automation, sales force automation, contracts management, customer service and support, and business intelligence, in a multi-channel environment.

- The Marketing suite provides campaign planning and execution, budget management, list creation, reporting and analysis tools. Marketing professionals use the Oracle Marketing applications to drive quality leads to sales, to expand reach and to maximize marketing effectiveness by using a comprehensive set of marketing automation, analysis and multi-channel execution capabilities. The Marketing suite offers seamless integration with sales, service and operations.
- The Sales suite provides integrated tools for all those who are involved in the sales process, including field salespeople, telesales agents, distributors and resellers, customers purchasing over the Internet and sales executives.

  Armed with up-to-the minute information regarding customers, leads and opportunities, as well as forecasts and compensation plans and projections, managers can proactively and effectively manage a sales force while providing the sales people with the information needed to close sales. Using this information, the field sales force, telesales teams, resellers, and Web storefronts can collaborate in closing more business together as one sales team.
- The Contracts suite enables authoring, executing and managing contracts, warranties and extended warranties which provides visibility to contract entitlements and proactively acting upon contractual commitments. Whether a

buyer or a seller, issuing contracts or receiving them, the Contracts suite automates the full contract life cycle.

- The Service suite manages service activities with the goals of profitability, employee productivity and complete customer satisfaction by addressing all service and support activities from initial contact with the customer through issue resolution. Automating service efforts can potentially transform an area that has historically proven to be a cost center into a revenue generator.

  This suite of applications provides customer support, field service and depot repair functionality. In addition, Oracle Services offers complete visibility into spare parts availability, logistics, service billing and customer contract entitlements. Oracle Customer Care provides full access to customer information from each touch point in the enterprise and to each customer care agent or other employees who interact with the customer. All of the Service products can be deployed across Web, call center and mobile field channels.

- The eCommerce suite of products aids in establishing profitable long-term relationships with customers through one-to-one marketing and personalized shopping experiences as well as proactive support and self-service capabilities. Oracle eCommerce synchronizes all customer interactions and transactions by integrating Web-based channels with traditional channels.

### Enterprise Resource Planning (ERP)

Companies use the ERP applications to control their back-office operations. For example:

- Oracle Order Management applications feature advanced configurator functionality, global available to promise, flexible pricing support, efficient delivery, high volume transactions and flexibility to adapt to changing business conditions.
- Oracle Supply Chain Planning applications provide the tools required to optimize flow of material, cash, and information across the extended supply chain.
- Oracle Manufacturing applications support all styles of manufacturing - engineer-to-order, discrete, process, flow, lot based, and project based manufacturing.
- Oracle Financials provide solutions for strategic planning, accounting, treasury, project management, and travel management.

- Oracle Human Resources Management System is a comprehensive solution for managing a company's human resources, allowing organizations to attract, retain and develop critical skills and knowledge on a global basis.

### Common Application Architecture

The Common Application Architecture includes functionality that supports both CRM and ERP applications. For example, TCA, Oracle's Trading Community Architecture, consists of a database schema and Application Programming Interfaces (APIs) where you can model the complex relationships that occur within a business community and enter that data consistently throughout the enterprise. Because the model is not hierarchical, Oracle applications can model complex B2B2C relationships and not to be limited to either a B2B or B2C implementation. TCA delivers a 360-degree view of the customer.

## 1.2 Oracle Partners Overview

Oracle Partners is a part of the Oracle E-Business Suite, an integrated suite of applications for the enterprise, including both ERP and CRM. An Oracle Partners solution comprises of:

- Oracle Partners - provides a set of tools for recruiting, enabling, and going to market with partners.
- Channel Collaboration Flows - embedded within Oracle E-Business suite to effectively include partners to market, sale and support end customers.
- Unified User Interface and messaging architecture for partners to collaborate with the vendor organization.

An Oracle Partners solution is bundled with Oracle E-Business Suite at no additional cost. Customers have to license the appropriate CRM and ERP modules such as Sales, Quoting, and Service for external parties off the price list to enable corresponding channel collaboration flows.

### 1.2.1 Oracle Partners Key Features

Oracle Partners enables companies to extend their business processes to work collaboratively with distribution channel partners in marketing, sales, and service functions to increase revenues and enhance customer satisfaction. Oracle Partners comprises of Oracle Partners and Oracle E-Business Suite components, such as Oracle Marketing, Oracle Trade Management, Oracle iStore, and Oracle Sales. Oracle Partners allows companies to register, profile, and manage channel partners, whereas the E-Business Suite components enable companies to automate and streamline partner transactions. Catering to the needs of both direct and indirect channels, the E-Business Suite components provide complete demand chain visibility and control of the sales-and-delivery cycle for companies.

Oracle Partners allows channel managers to manage partner interactions through a personalized Web interface. Channel managers can manage the entire partner lifecycle starting from registering partners, profiling them, to analyzing partner performance. Oracle Partners includes the following features:

- Partner Management
- Partner Profiling
- Partner Locator

### Partner Management

Oracle Partners enables channel managers to register partners, create financial accounts, and activate opportunity sharing for partners. Channel managers can set up partners with two different roles; partner user and partner administrator. Partner users will be able to login to the application to conduct transactions with the company. Partner Administrator can manage the partnership profile information and the users within the partner organization. The delegated partner administration capability allows companies to maintain current information about their partners without additional costs.

### Partner Profiling

Oracle Partners provides a flexible profiling framework to capture and track the attributes of the partners. The profiling framework supports fixed attributes, information entered by the partner or channel manager, and derived attributes, information calculated based on partner data and transactions. Profiling can be done for the partnership and for the partner users. The profiling framework provides a central repository to capture and track all partner related information. Channel managers can use this information to differentiate partners and provide better services, such as soft funds, incentives, and opportunities.

### Partner Locator

Partner Locator enables users to search for partners that best meet their business needs. Partners can be located based on type, geography, and other criteria. The Partner Locator displays partners that satisfy all of the search criteria entered. Companies can integrate the Partner Locator with their existing Web sites to help customers find a partner to fulfill their specific needs.

### 1.2.2 Oracle Partners Key Benefits

As a key application of the Oracle E-Business Suite, Oracle Partners offers the following benefits:

- Partner Management - Oracle Partners provides a flexible profiling framework that enables an organization to profile, track and manage your partner relationships. The organization can define various types of custom partner profile attributes in addition to the seeded attributes. These attributes are used by Oracle Partners to perform partner matching on a wide variety of criteria.
- Opportunity Assignment to partners - an organization can extend its customer reach by leveraging its partners in the sales cycle. Oracle Partners assists an organization in following a lead as it matures into an opportunity and then assign that opportunity to a partner with the highest probability of converting that opportunity into a sale. An Oracle Partners user with a role of Assignment Manager, Sales Manager, or Channel Manager can manually search and select appropriate partners to work on indirect opportunities. Alternatively, you can define business rules to automatically assign opportunities to partners.
- Using its integration with Oracle eLocation service, Oracle Partners provides geo-proximity analysis in the assignment process, allowing the organization to select a geographically appropriate partner whether it’s down the street or miles away.
- Reseller Locator - Customers can now find releasers with required expertise and capacity within their neighborhood using Oracle Partners 'reseller locator' tool. Through integration with eLocation Service, Reseller Locator provides accurate distance and driving directions to the reseller.

#### 1.2.2.1 Tabs in the Application

User functionality in Oracle Partners is organized into the following tabs:

- Home
- Opportunity
- Forecast
- Customer
- My Company (VAD & Partner Only)
- Partner (VAD and Vendor User only)
- Program

- Support
- Administration

#### 1.2.2.2 Short Descriptions of tabs

A short description of each tab is provided below:

**Home**

The Home tab displays a variety of bins which may show charts and reports such as open opportunities, won opportunities, and favorite reports. The Home page can be customized to select the bins, charts and reports that should appear to a particular user.

**Opportunity**

The Opportunities tab displays a list of available opportunities. Opportunity listing can be personalized and searches saved so that multiple customized lists of opportunities can be saved. The Reports horizontal navigation link provides a list of available reports and charts.

**Forecast**

The Forecast tab displays forecast values for items in the pipeline for the user according to the criteria: Group, Period, Category, and Credit Type. In addition, the following horizontal navigation links are available:

- Opportunity; enables users to create an opportunity worksheet based on Group, Period, Category, and Credit Type, and previously saved values or default pipeline values.
- Product Category; enables users to create a product category worksheet using the same parameter types as an opportunity worksheet.
- Quick Forecast; creates a forecast based on the period type, period, category, and credit type.
- Reports; provides a list of available reports and charts.

**Customer**

The Customer tab displays a list of available customers. Users can personalize customer listing and save customized searches. In addition, the following horizontal navigation links are available:

- Person; provides a list of people and shows phone and e-mail address books, and allows the user to send e-mail directly from this page. This listing of persons may be personalized and searches saved so that multiple customized lists of persons may be saved.
- Contacts; provides a list of contacts and shows phone and e-mail address books, and allows the user to send e-mail directly from this page. This listing of contacts may be personalized and searches saved so that multiple customized lists of persons may be saved.
- Contact List; where users can create and manage their contact lists.
- Reports; provides a list of available reports and charts.

### Partner (VAD and Vendor user only)

This tab displays a list of available partners. The listing of partners may be personalized and searches saved so that multiple customized lists of partners may be saved. The Contact horizontal navigation link provides a page for managing partner contacts.

### Program

This tab enables vendors to create new programs, edit programs, and enroll partners into a program. Programs enable vendors to create membership programs that offer special incentives and benefits for their channel partners. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, training, and others. This tab offers the ability to:

- Create a partnership program and define program characteristics
- Edit a partnership program
- Develop links between programs to create parent and child relationships
- Define enrollment qualifications of a program
- Define vendor contact responsible for approving partner program enrollment
- Define the benefits of a program
- Define the payment terms of a program
- Define the terms and conditions associated to a program
- Display the number of partners enrolled in each program and allow drill down to specific partner data.

#### Support

The support tab is available only to partner users.

#### Administration

The Administration tab provides configuration functionality for many of the Oracle E-Business Suite applications, including Oracle Partners.

## 1.3 New in this Release

This release includes the following new features:

- Section 1.3.1, "Partner Profiling Enhancements"
- Section 1.3.2, "Partner Programs and Enrollment"
- Section 1.3.3, "Partner Facing UI Enhancements"

---

**Note:** This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.9 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

---

### 1.3.1 Partner Profiling Enhancements

This release extends Partner Profiling system to support:

#### 1.3.1.1 Partner Contact Profiling

Employees of your partner organizations are extensions of your marketing, sales, and support staff. It is necessary to make sure your partner contacts are proficient on your product line(s) to guarantee end customer satisfaction. Proficiency and certifications of your partner contacts play an important role in assignment and routing of sales and support transactions to your partners. This release provides profiling capabilities at the partner contact level. You can now integrate Oracle Partners with Oracle iLearning (or other LMS systems) to pull training and certification information about your partner contacts.

#### 1.3.1.2 Additional Profile Attribute Types

This release introduces additional profile attribute types such as, Numeric, Text, Currency, Date, and Percentage based List of Values. 'Percentage based LOV' attributes can be used to capture information such as, percentage revenue split by product category, by region and so on. This release also provides variety of new display styles such as check box, radio button, and 'Multi/single-select list-box' for rendering LOV attributes.

#### 1.3.1.3 Profile Attribute Versioning and Validation

Profile versioning and time stamping enables the user to view the attribute values for a partner at a snapshot in time. Versioning and date stamping of the partner profile allows you to analyze progress of a partner during the recruitment and ramp-up phase of the partner lifecycle. You may need proof/documentation of performance from the partner for certain profile attributes like Product Certifications, Total Trained Professional by Product Category, Total Revenue Contribution and so on. This release allows you to identify profile attributes that need data validation. Partner Manager can then attach proof of validation/performance to such attributes in the partner profile.

#### 1.3.1.4 UI Enhancements to Partner Manager view of Partner Profile

This release provides partner/alliance manager.

- Easy to read, categorized view of the partner profile
- Ability to view Profile as of certain date/time
- View audit trail of changes to a profile attribute data
- Attach proof of validation/performance to an attribute that needs data validation
- View attribute data validation history

> **Note:** Attributes can also be added in relation to Leads and Opportunity. For more information, see the *Leads Implementation Guide* and *Opportunity Implementation Guide*.

## 1.3.2 Partner Programs and Enrollment

This release of Oracle Partners provides a flexible Partner Program framework to programmatically manage your partners. It also offers configurable partner registration and enrollment support.

Oracle Partners allows you to create robust partner programs to roll out to your partner community. Partner programs provide a basis to more effectively segment and manage partner interactions across the E-Business Suite. Partner Managers can design program hierarchies to manage and group programs for certain partner segments. Once program structures are created, you can create marketing campaigns to target your partners for specific programs. Partner programs give you the utility to simplify the management of the relationship with partners. You can create programs to automatically expedite the benefits to partners. Programs drive all contractual and implied entitlements.

### 1.3.2.1 Key Features

**1.3.2.1.1 Program Qualification Rule** Qualification Rules specified in the Program definition are used to programmatically determine if the applying partner meets the qualifying requirements. Enrollment request approver can override system generated result as/if necessary.

**1.3.2.1.2 Program Fees and Payment Rules** Partner Managers can specify fees associated with the partner program, if any. They can also specify appropriate payment methods by geographic regions. This information is used by the Partner Enrollment System to process the payment. Following payment types are supported in Oracle Partners:

- Credit Card
- Check
- Cash
- Purchase Order

**1.3.2.1.3 Program Contractual Terms and Conditions** Partner managers can associate the appropriate Contract Template (defined in Oracle Contracts) to a program, by geography. During the Partner Enrollment process, appropriate contract is presented to partner (based on partner's geographical location) to sign. Partner can choose to sign the contract online or print and mail/fax it. The partnership contract between the two parties in stored and maintained in Oracle Contracts Application.

**1.3.2.1.4 Program Hierarchies and Upgrade Rules** Partner Programs can be grouped and organized using Program Hierarchies. User can define upgrade rules among programs. E.g. Partners can move from 'Reseller Program - Silver' to 'Reseller Program - Gold' to 'Reseller Program - Platinum'.

**1.3.2.1.5 Program Enrollment Questionnaire** User can define Enrollment Questionnaire in the Program definition. The questionnaire can be configured to point to appropriate profile attributes. During the enrollment process, system prompts partners with the enrollment questionnaire and populates partner responses into the their profile.

**1.3.2.1.6 Centralized Approval Rules for Program Enrollment** User can define approval rules for the program enrollment request using Oracle Approval Management (AME). Based on the approval rule definition, system routes enrollment requests to appropriate people. AME supports serial approvals and a variety of rule parameters such as Program Name, Country, Zip Code, and Partner Type. Consultants can configure additional parameters as required during implementation.

**1.3.2.1.7 Partner Enrollment System** New and existing partner can enroll into a partner program from your Web site. Enrollment Process consists of following steps:

- Enrollment Questionnaire - Enrollment questions are mapped to profile attributes and partner profile is dynamically populated based on partner responses to the questions.
- Partnership Contract Terms and Condition - Appropriate partnership contract terms and conditions, based on partner's geographical location, are presented to partner which partner can sign online or print and mail/fax it. Partnership Contracts are maintained in Oracle Contracts.
- Program Payment Handling - Based on the program definition, system presents appropriate payment amount with applicable tax (based on partner company's geographic location) to the partner. Partner can make payment using one of the available payment methods for his/her geographic location. Enrollment system is integrated with Order Management and iPayment server (for credit card authorization) to process the payment.

**1.3.2.1.8 Program Renewals and Upgrades** Partner Managers can setup renewal notification reminder intervals for a partner program. The system notifies partners about their membership expiration based on the reminder interval. The system prompts partners to validate their current profile, sign renewal contract, and process applicable payments during the program renewal process. The system also prompts partner to upgrade their membership based on Program Upgrade rules.

**1.3.2.1.9 Program Invitations** Partner Manager can invite certain partners to join new programs or upgrade their membership. As an incentive, Partner Manager can extend fee waiver/discount to the partners. The system notifies partners by e-mail and prompts them to sign appropriate contract, if necessary.

### 1.3.3 Partner Facing UI Enhancements

This release provides additional bins on the home page for partners to view available programs, program upgrades, renewals, and Program Notifications. Partners can now view and update their profiles maintained by the vendor. They can also view the partnership contracts between them and the vendor

**Additional bins to view**

- Available new programs
- Available program upgrades
- Upcoming program renewal
- Program notifications

**Ability for partners to view**

- Their company profile
- Outstanding partnership contracts

# 2 Before You Begin

This chapter provides an overview of what should be installed, implemented, and verified before implementing Oracle Partners. Topics include:

- Section 2.1, "Installation Verification"
- Section 2.2, "Application Procedures"
- Section 2.3, "Oracle Partners Dependencies"
- Section 2.4, "Mandatory Dependencies"
- Section 2.5, "Conditional Dependencies"
- Section 2.6, "Dependency Verification"

## 2.1 Installation Verification

Prior to the implementation of Oracle Partners you must 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

Before attempting to run CRM applications, first verify that you can perform the tasks outlined in Table 2–1. The listed tasks are generic tasks that are typical of all users of the Oracle E-Business Suite. Depending on your business processes, and the modules that you are installing, not every listed task is applicable to your installation.

Table 2–1 describes the non- CRM application module tasks that need to be performed, and which CRM modules require the completion of the task before implementation.

***Table 2–1 Application Dependency Checklist***

| Application | Task | CRM Module |
|---|---|---|
| Application Object Library | 1. Creating an FND User<br>2. Assigning AOL Responsibilities to the User<br>3. Setting User Application, Responsibility, or Site Level Profile Options | ■ Resource Manager<br>■ Territory Manager<br>■ Task<br>■ HTML Calendar<br>■ Forms-based Calendar<br>■ Notes<br>■ Business Rule Monitor<br>■ Escalation Manager<br>■ Assignment Manager |
| Oracle Human Resources | Creating an Employee | ■ Resource Manager<br>■ Task Manager<br>■ Business Rule Monitor<br>■ Escalation Manager |
| Oracle Human Resources | Creating a New Business Unit | Resource Manager |
| Oracle Receivables | 1. Creating a Customer<br>2. Creating a New Organization | Resource Manager |

***Table 2–1 Application Dependency Checklist***

| Application | Task | CRM Module |
|---|---|---|
| Oracle Workflow | Creating a Workflow With Notifications | ■ Resource Manager<br>■ Task Manager<br>■ HTML Calendar<br>■ Notes<br>■ Business Rule Monitor<br>■ Escalation Manager |
| Oracle Inventory | 1. Defining Categories<br>2. Defining Products and Platforms<br>3. Defining Unit of Measure Classes<br>4. Defining Units of Measure | ■ Resource Manager<br>■ Task Manager<br>■ Assignment Manager |
| Oracle Purchasing | Creating a Supplier Contact | Resource Manager |
| Oracle Order Management | Defining Sales Credit Types | Resource Manager |
| Oracle General Ledger | Setting Up Accounting Flexfields | Resource Manager |

## 2.2 Application Procedures

You must be able to complete each of the following non-CRM tasks successfully for your CRM applications to work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

### 2.2.1 Creating an FND User

Perform the following steps to create an FND user in the Application Object Library.

#### Reference

*Oracle Applications System Administrator's Guide,* See Chapter 2, Managing Oracle Applications Security.

#### Prerequisites

None

#### Responsibility

System Administrator

#### Navigation

Security > User > Define

#### Steps

1. In the User window, enter a new user name in the User Name field.
2. Enter a password in the Password field.
3. Re-enter the password for verification.
4. Select the employee's name from the list of Values (LOV) in the Person field.
5. In the Responsibilities side navigation link, select the CRM HTML Administration responsibility from the drop-down list of values.
6. Save the new user.

To verify that the user setup is successful, perform the following steps:

1. Login to your Personal Home Page as the newly created user.
2. Enter your new password when prompted.

You should now be able to access the Personal Home Page for this user.

> **Note:** For this user to have access to HTML applications, you must set additional profile options as detailed in the *Oracle CRM Application Foundation Implementation Guide*.

### 2.2.2 Assigning AOL Responsibilities to the User

A responsibility defines an application user's current privileges while working with Oracle Applications. When an application user signs on, they select a responsibility that grants certain privileges, specifically:

- The functions that the user may access. Functions are determined by the menu assigned to the responsibility.
- The concurrent programs, such as reports, that the user may run.
- The application database accounts to which forms, concurrent programs, and reports connect.

You cannot delete a responsibility because this information helps to provide an audit trail. You can deactivate a user's responsibility at any time by setting the end date to the current date. If you wish to reactivate the responsibility for the user, change the end date to a date after the current date, or clear the End Date.

After creating the FND User, perform the following steps to assign the user AOL responsibilities.

#### Reference

*Managing People Using Oracle HRMS (US), s*ee Chapter 1, Employee Management

#### Prerequisites

None

#### Responsibility

System Administrator

#### Navigation

Security > User > Define

#### Steps

1. With the user information populated in the window, select the Responsibility field in the Responsibilities tab.
2. Select the necessary responsibility from the List of Values (LOV).
3. Define the Effective dates.
4. Save your work.

### 2.2.3 Setting User Application, Responsibility, or Site Level Profile Options

A user profile is a set of changeable options that affect the way your application looks and behaves. As System Administrator, you control how Oracle Applications operate by setting user profile options to the values you want. You can set user profile options at four different levels: site, application, responsibility, and user.

After creating the FND User, perform the following steps to set profile options.

#### Reference

*Managing People Using Oracle HRMS (US),* See Chapter 1, Employee Management

### Prerequisites

None

### Responsibility

System Administrator

### Navigation

Security >Profile > System

### Steps

1. In the Find System Profile Values window, enter the profile option you want to set and click **Find**.

   The System Profile Values window opens with the profile option you searched for.

2. Set at least one of the following:

   a. Set the Site value.

      This field displays the current value, if set, for all users at the installation site.

   b. Set the Application value.

      This field displays the current value, if set, for all users working under responsibilities owned by the application identified in the Find Profile Values block.

   c. Set the Responsibility value.

      This field displays the current value, if set, for all users working under the responsibility identified in the Find Profile Values block.

   d. Set the User value.

      This field displays the current value, if set, for the application user identified in the Find Profile Values block.

      You should set site-level default values for any required options after installation of an application. If you do not assign a particular profile option at any of the four levels, that option does not have a default value and may cause errors when you use forms, run reports, or run concurrent requests.

3. Save your work.

## 2.2.4 Creating an Employee

To successfully run most of the CRM products, you must first create employee resources within the ERP Human Resource Management System (HRMS) application. Perform the following steps to define an employee for minimal functionality.

---

**Note:** If Oracle HRMS is not installed, then you must enter a new employee using the Enter Person form by navigating to Resource Manager > Maintain Employee > Employee.

---

### Reference

*Managing People Using Oracle HRMS (US), s*ee Chapter 1, Employee Management

### Prerequisites

None

### Responsibility

US HRMS Manager or US Super HRMS Manager

### Navigation

People > Enter and Maintain

### Steps

1. Click **New** In the find window.

   The People window opens.

2. Enter the following employee information in the appropriate fields:

   - Last Name
   - First Name
   - Title

3. Select the person's gender from the drop-down list.
4. Select Employee from the type drop-down list.
5. Enter the person's social security number.
6. Save you work.

## 2.2.5 Creating a New Business Unit

A Business Group is a special class of organization. Every Business Group can have its own set of default values, with its own internal organizations, grades, jobs, positions, payrolls, employees, applicants, compensations and benefits.

Organizations are the basic work structure of any enterprise. They usually represent the functional, management, or reporting groups which exist within a Business Group. Perform the following steps to create a new business unit.

### Reference

*Oracle Applications System Administrator's Guide*, See Chapter 2, Managing Oracle Applications Security

### Prerequisites

None

### Responsibility

US HRMS Manager or US Super HRMS Manager

### Navigation

Work Structures > Organization > Description

### Steps

1. Click **New** in the Find Organization window.
2. Enter the name for the Organization
3. Select Business Unit from the list of values (LOV) in the Type field.

   The current date populates the From Date field.
4. Enter the Organization location details from the LOV.
5. Save your work.
6. In the Organization Classification region, select the classification from the LOV.
7. Select the Enabled check box.
8. Save your work.
9. Click **Others** for additional information on the classification you selected.
10. Save your work.

### 2.2.6 Creating a Customer

Perform the following steps to create a new customer, with an address and contact information in the Oracle ERP Accounts Receivables application.

#### Reference

*Oracle Receivables User's Guide*, see Chapter 3, Customers

#### Prerequisites

None

#### Responsibility

Receivables Manager

#### Navigation

Customers > Standard

#### Steps

1. In the Find/Enter Customers window, select Person from the Customer Type drop-down list.
2. Enter the name of the customer in the Name column.
3. Click **Find** to verify if the customer already exists.

   As this customer does not exist, the New button is enabled in the Decisions window.
4. Click **New**.

   The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

   The Customer Addresses window opens.
6. Fill in the necessary information. Yellow fields are mandatory.
7. In the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
   - Usage: Marketing
   - Location: 6op9

- Primary: Yes

8. On the Contacts: Telephones tab, enter a new contact and phone number.
9. Save your work.

#### Verify the Information

To verify that the process worked properly, perform the following steps.

1. Open the Customer-Standard window again.
2. Enter the company name you entered above.
3. Click **Find** to query for the record you created in the Match Results window.
4. If the record is found, click the Contacts: Telephone tab.
5. Place the cursor in the Last Name field.
6. From the menu, select View > Query by Example > Enter.
7. Enter the contacts last name as the search criteria.
8. Navigate to View > Query by Example > Run.

   If the record for your contact name populates in the form, then you have successfully created a customer with an address and a contact person for the customer.

### 2.2.7 Creating a New Organization

Perform the following steps to create a new organization, with an address and contact information in the Oracle ERP Accounts Receivables application.

#### Reference

*Oracle Receivables User's Guide*, See Chapter 3, Customers

#### Prerequisites

None

#### Responsibility

Receivables Manager

#### Navigation

Customers > Standards

### Steps

1. In the Find/Enter Customer window, select Organization from the Customer Type drop-down list.
2. Enter the name of a test corporation in the Name field.
3. Click **Find** to ascertain if the customer already exists.

   As this customer does not exist, the New button is enabled.
4. Click **New**.

   The Customer-Standard window opens.
5. On the Address tab, click **New** to create a new address.

   The Customer Addresses window opens displaying the same business purpose table as on the first tab.
6. Fill in the necessary information. Yellow fields are mandatory.
7. In the Business Purpose tab, fill in the Usage, Location and select the Primary check box. For example:
   - Usage: Marketing
   - Location: 6op9
   - Primary: Yes
8. In the Contacts: Telephones side navigation link, enter a new contact and phone number.
9. Save your work.

## 2.2.8 Creating a Workflow With Notifications

Perform the following steps to create and run a workflow with notifications.

### Reference

*Oracle Workflow Guide 2.5*, see Chapter 3, Defining a Workflow Process and Chapter 4, Defining Workflow Process Components

### Prerequisites

None

### Responsibility

Workflow Administrator

### Navigation

Workflow >Launch Processes

### Steps

1. In the Launch Processes window, in the Item Type column, click **Document Management**. If you have renamed the item types, this option appears in the Internal Name column as WFDM.

   The Initiate Workflow-WFDM page opens.

2. Enter values in the following fields:

   - Item Key: Enter your name plus a sequence number (for example, jdoe1001)
   - User Key: You may copy the value in the Item Key field
   - Process Name: Enter Document Review
   - Process Owner: Your logged in user name populates automatically
   - Send Document: Leave blank
   - Document Owner: Select a valid resource name
   - Document Reviewer: Choose a value from the list of values
   - Comments: Enter Workflow Verification
   - Response Document: Leave blank

3. Click **OK**.

   The Activities List page opens to show workflow statuses. The status of the workflow you just initiated should be Active.

4. If the status of the workflow is Error, click **Exception** in the Result column to see an explanation of the error.

5. Click **View Diagram** to see a graphical representation of the workflow process.

   Leave the View Diagram window open as you continue to check the workflow.

6. Save your work.

### To Review the Progress of a Workflow

Use the following procedure to verify that the Workflow notification is sent.

### Steps

1. Login to your Personal Home Page.
2. In the list of Self Service Application, choose the Workflow User Web Application responsibility.
3. In the Navigator, choose Workflow >Find Notifications.

   The Find Notifications page opens.
4. In the Type field, enter Document Management. In the To field, enter the document reviewer.
5. Click **Find**.

   The Worklist window opens.
6. Click **Subject** to open the notification.

   If you see the notification, then workflow is set up correctly.
7. Click **Approve** to return to the Worklist window.

### Further Verification

You may go back to the View Diagram window that you opened earlier. Click **Reload** in the browser window to refresh the contents of the window. After the workflow process completes successfully, you can see a green line from the Start icon to the End (Approve) icon.

## 2.2.9 Defining Categories

You can use categories and category sets to group items for various reports and programs. Perform the following steps to define categories.

---

**Note:** Category sets may be used as a means to develop custom lists of items on which to report and sort. You can also create other category sets such as John's Priority or Jane's Priority, with categories like high, medium, and low.

---

### Reference

*Oracle Inventory User's Guide*, See Chapter 4, Item Setup and Control

### Prerequisites

The categories you assign to a category set must have the same flexfield structure as the set itself. This is true even if you choose not to validate the category list.

### Responsibility

Inventory

### Navigation

Setup > Items > Categories > Category Sets

### Steps

1. Select the appropriate organization name in the Organization window, if necessary.
2. In the Category Sets window, enter a unique category set name and description information.
3. Enter a flexfield structure.
4. Select a control level.
   - Master Level: Item assigned to this category set has the same category value in all organizations where it is assigned.
   - Org Level: Item assigned to this category set may have a different category value in each organization where it is assigned.
5. Select a default category.

   This is the default category used when assigning an item to the category set. For example, a category set may have a default category called New. After an item is assigned to New, you can override the default category and choose another relevant category for each item.
6. Decide whether or not an item can be assigned to multiple categories within this category set.
   - Enable: You can assign an item to multiple categories within a category set. For example, you may define a Hazard category set. In this case, an item may be assigned to both the Poison and Corrosive categories.

- Not Enable: You can assign an item to exactly one category. For example, you may define a Web Display category set. In this case, an item can be assigned to only one default display category.

7. Decide whether or not to enforce the list of valid categories.
   - Enable: You can assign an item only to those categories defined as valid categories for this category set. For Oracle Purchasing, this check box is not applicable, and you can assign items only to categories defined as valid for this category set.
   - Not Enable: You can assign an item to any defined category that uses the same flexfield structure as this category set.
8. Select a list of valid categories.

   The list of values here includes only categories that use the same flexfield structure as the category set you are defining.
9. Save your work.

## 2.2.10 Defining Products and Platforms

You define and rate products and platforms in Oracle Inventory in order to set resource skill levels in the HTML Resource Manager. See the *Oracle Inventory User's Guide*, See Chapter 5, Items for more information on how to define products and platforms.

### Reference

*Oracle Inventory User's Guide*, see Chapter 5, Items

## 2.2.11 Defining Unit of Measure Classes

Perform the following steps to define a unit of measure class.

### Reference

*Oracle Inventory User's Guide*, See Chapter 3 Units of Measure

### Prerequisites

None

#### Responsibility

Inventory

#### Navigation

Setup > Units of Measure > Classes

#### Steps

1. In the Units of Measure Classes window, select File > New.
2. Enter a unique name for the unit of measure class.
3. Enter a description for the UOM class.
4. Define the base unit of measure for this class.
5. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
6. Select the "inactive on" date from the date picker.
7. Save your work.

### 2.2.12 Defining Units of Measure

Units of measure are used by a variety of functions and transactions to express the quantity of items. The values defined in the Units of Measure window provide the list of values available in unit of measure fields in other windows. Units of measure are not organization–specific. Perform the following steps to define units of measure.

#### Reference

*Oracle Inventory User's Guide*, See Chapter 3 Units of Measure

#### Prerequisites

At least one unit of measure class must exist.

#### Responsibility

Inventory

#### Navigation

Setup > Units of Measure > Units of Measure

### Steps

1. With the Units of Measure window open, select File > New.
2. Enter a unique name for the unit of measure.
3. Enter a unique abbreviation for the unit of measure with a maximum length of three characters. Examples include, EA for each or HRS for hours.
4. Enter a Description for the UOM.
5. Select the check box if this is the base unit of measure for the unit of measure class.
6. Enter a unit of measure class.
7. Select an "inactive on" date from the date picker.
8. Save your work.

## 2.2.13 Creating a Supplier Contact

Set up suppliers in the Suppliers window to record information about individuals and organizations from whom you purchase goods and services. You can also enter employees whom you reimburse for expense reports. When you enter a supplier that does business from multiple locations, you store supplier information only once, and enter supplier sites for each location. You can designate supplier sites as pay sites, purchasing sites, RFQ only sites, or procurement card sites. For example, for a single supplier, you can buy from several different sites and send payments to several different sites. Most supplier information automatically defaults to all supplier sites to facilitate supplier site entry. However, you can override these defaults and have unique information for each site.

The system uses information you enter for suppliers and supplier sites to enter default values when you later enter transactions for a supplier site. Most information you enter in the Suppliers window is used only to enter defaults in the Supplier Sites window. When the system enters that information in a later transaction, it only uses supplier site information as a default, even if the supplier site value is null and the supplier has a value. If you update information at the supplier level, existing supplier sites are not updated.

When you enter a supplier, you can also record information for your own reference, such as names of contacts or the customer number your supplier has assigned to you. Perform the following steps to create a supplier contact.

### Reference

*Oracle Public Sector Purchasing User's Guide*, Chapter 5, Supply Base Management

### Prerequisites

- Verify that the supplier does not exist in the system. Use the Suppliers Report and Supplier Audit Report.
- Define the following lookups in the Oracle Purchasing Lookups window: Pay Group, Supplier Type, Minority Group.
- Define Supplier Types in the Oracle Payables Lookups window.
- If you have installed Purchasing, complete Purchasing setup.
- If you use Oracle Purchasing, define Supplier Types in the Oracle Payables Lookups window.
- If you use Oracle Purchasing, define FOB codes, Minority Groups, and Freight Terms codes in the Oracle Purchasing Lookups window.
- If you use Oracle Purchasing, define Ship Via codes in the Defining Freight Carriers window.

### Responsibility

Purchasing

### Navigation

Supply Base > Suppliers

### Steps

1. In the Suppliers window, enter a unique Supplier Name.
2. If the Supplier Number Entry option in the Financials Options window is set to Automatic, Payables automatically enters a Supplier Number for you. If this option is set to Manual, you must enter a unique Supplier Number.
3. (Optional) Enter the supplier's tax identification number in the Taxpayer ID field; for example, an individual's social security number, or a corporation or partnership's federal identification number/federal tax ID.
4. (Optional) Enter the value-added tax (VAT) registration number in the Tax Registration Number field if you are entering a VAT supplier.

If you want to prevent invoice or purchase order entry for this supplier after a certain date, then enter the date in the Inactive On field.

5. Enter supplier information in the appropriate tabs of the Suppliers window.
6. In the Suppliers window, choose the Sites button to navigate to the Supplier Sites window. Enter at least one supplier site name and address.
7. Save your work.

## 2.2.14 Defining Sales Credit Types

Order Management uses sales credit types to determine if the sales credit for an order is a quota or non-quota amount. Perform the following steps to define sales credit types.

### Reference

*Oracle Order Management User's Guide*

### Prerequisites

None

### Responsibility

Order Management Super User

### Navigation

Setup > Sales > Credit Types

### Steps

1. Navigate to the Sales Credit Types window.
2. In the Sales Credit Type window, enter the Credit Type Name and Description for the credit type.
3. Select the Quota check box if the sales credit type applies to revenue quota sales credit that you assign to sales people.
4. Select the Enabled check box to activate the sales credit type.
5. Save your work.

### 2.2.15 Setting Up Accounting Flexfields

Use descriptive flexfields to tailor General Ledger to fit your unique information needs. For example, you may want to collect additional information on budget organizations, such as the manager and the size of the organization. You can even define context–sensitive flexfields that prompt you for additional information based on your previous entries. Perform the following steps to set up accounting flexfields.

---

**Note:** You only need to set up accounting flexfields if you are using the Freight, Revenue, or Receivables Account fields, in the Resource Manager Receivables tab.

---

#### Reference

*Oracle General Ledger User's Guide*

#### Prerequisites

Use the Value Sets window to define any value sets you need.

#### Responsibility

General Ledger Super User

#### Navigation

Setup > Financials > Flexfields > Descriptive > Segments

#### Steps

Consult the following manuals for more information:

- *Oracle General Ledger User Guide*
- *Oracle Applications Flexfields Guide*

## 2.3 Oracle Partners Dependencies

The following table lists the dependencies for Oracle Partners. The required dependencies must be implemented prior to the implementation of Oracle Partners.

The dependent CRM foundation modules must be implemented in full. Any dependent applications must be set up in full if you have purchased a license for that application. If you have not purchased a license, then you need to only set the application up to the extent allowed by the shared license which comes free of charge with Oracle Partners.

| Application or Module |
|---|
| Human Resources (HRMS) |
| CRM Foundation Resource Manager |
| CRM Foundation Task Manager |
| CRM Foundation Notes |
| CRM Foundation Tasks |
| One to One Fulfillment |
| Oracle Sales Online |
| Oracle *i*Support |

## 2.4 Mandatory Dependencies

Oracle Partners 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.

## 2.5 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

## 2.6 Dependency Verification

Prior to the implementation of Oracle Partners you must:

1. Verify that Oracle E-Business Suite Enterprise database has been properly installed. If not, install the database according to the procedure described in *Oracle E-Business Suite Certified Configuration Installation Guide*.
2. Verify that Oracle Partners 11*i* is properly installed.

# Part II

# Implementing Oracle Partners

This section contains the following chapters:

# 3 Implementation Overview

The following is general information regarding basic concepts used during implementation. Oracle strongly recommends that you implement Oracle Partners in the order listed:

- Section 3.1, "Process Description"
- Section 3.2, "Profile Options"
- Section 3.3, "Lookups"
- Section 3.4, "Concurrent Manager Programs"

## 3.1 Process Description

Each implementation section of this guide covers the settings required to implement Oracle Partners. When the step includes steps performed in another application such as Oracle CRM Application Foundation, the relevant implementation guide is referenced.

## 3.2 Profile Options

The procedure for setting up and changing profile options is the same for all Oracle Applications. For a detailed description of the procedures, see *Oracle Applications System Administrator's Guide*.

Profile options may be set at four different levels:

**Site:** The site level setting affects the entire Oracle E-Business Suite.

**Application:** When a profile option is set at this level, it overrides the site level setting for the particular application.

**Responsibility:** The responsibility level setting affects users of a given responsibility. When a profile option is set at this level it overrides the application level setting for users of the particular responsibility.

**User:** Settings at the user level affect the individual user only. When a profile option is set at this level it overrides the responsibility level setting for an individual user.

---

**Note:** Profile options belonging to Oracle Partners have the prefix of PV. During implementation, profile options relating to dependencies may be set as well.

---

## 3.3 Lookups

There are three types of Lookups:

- **System:** System lookups may not be modified or deleted, and may not have additional values added.
- **Extensible:** Extensible lookups may have additional values added to the list. Seeded extensible lookups may not be deleted.
- **User:** User lookups are completely modifiable. They may be modified and/or added to. Seeded user lookups, if any, may be modified or deleted.

---

**Note:** All levels of lookups may have their visible value, the text displayed to the user, modified.

---

## 3.4 Concurrent Manager Programs

Many of the processes that are involved with the operation of Oracle Partners require processes to run periodically or at certain times. These processes are referred to as Concurrent Manager Programs.

For information on concurrent programs, see Appendix D, "Concurrent Programs".

### 3.4.1 Administration Options

There are a number of administration options that are associated with the individual tabs in Oracle Partners and some that affect multiple tabs.

Many administration options choices are used, throughout the application, to populate drop-down menu selections with a list of values (LOVs).

# 4 Implementing Profile Attributes

The following sections in this chapter provides information regarding attributes used during implementation.



## 4.1 Overview

Attribute management provides important characteristic information on Oracle Partners business entities (partners, partner contacts, leads, opportunities, and so on) and helps companies increase knowledge of their partner's demographics, contacts and capabilities, such as, who they are, what they sell, where they sell, what industries they focus on, what certifications they have, and so on.

Thus, attribute setup is required to capture additional specific business information for a given business entity within Oracle Partners. The basic/core information about the specific Oracle Partners business entity is captured at the time the business entity is defined.

Vendors can now:

- Profile down to the partner contact level
- Create profile attributes with new types and display styles

- Track attribute value history and view snapshots of attribute values
- Create profile attributes that require validation
- Redesign view of attributes from the partner tab
- Allow attributes to be configured to be exposed to partners

### 4.1.1 Profile Down to the Partner Contact Level

Vendors have the ability to track and match partners based on attributes that might be at the contact level. Contact level attributes can be used for integration points with other modules such as iLearning.

When looking at a partner contact, vendors have the ability to look at contact level profile attributes. This enables the vendor to be familiar with their indirect channel more personally. Organization level attributes can be derived from these related contact values.

### 4.1.2 Profile Attributes with New Types and Display Styles

Profile attributes can be expanded to include many different types. This ensures better quality of data, and tighter integration with parts of the application like Enrollments.

Vendor Administrators can create profile attributes that have more sophistication in their values. This enables vendors to track partner profiles more completely, and lead to enhanced matching, searching, and reporting.

### 4.1.3 Attribute Value History and Snapshot of Attribute Values

Profile attributes are constantly being updated by either partners, vendors, or programatically. Vendors can now track changes since attributes impact partner matching, and might result in errors.

Vendors have the ability to see who made the change (user, or system updated), when the changes were made, and what the values are. For derived values, the attribute changes are logged, but not displayed. If the program is scheduled to run frequently, there might end up being too much data in the audit history to make it usable.

Vendors can view a partner's attribute values at any point in time. By choosing a date, the system returns a snapshot view of what the values were at that time.

### 4.1.4 Profile Attributes that require Validation

Some profile attributes might require the vendor to verify the partner's values that they entered. Notifications are sent to make sure that the vendor validates in a timely manner.

As a vendor updates an attribute value that has been checked as "Requires Validation", the appropriate channel manager is notified that an attribute needs to be validated. The vendor can view validation history, as well as perform validation by assigning a date, proof of validation, and possibly a note.

Proof of validation can be an attachment that can be uploaded into the system.

### 4.1.5 Attributes from the Partner tab

Attributes that are enabled for "Expose To Partner" check box in the Attribute Details page are exposed to partner users. Users can view histories for attribute values, as well as view a snapshot of values at one point in time.

### 4.1.6 Attributes to be Exposed to Partners

All attributes will not be exposed to partners. Derived value attributes might make sense to the vendor user, but would not necessarily make sense to the partner.

## 4.2 Setting Up Categories

The categories shipped with the product are General, Sales, and Resource attribute categories. New categories can be set up in forms, by adding new lookup values to the lookup type "Attribute Categories (PV_ATTRIBUTE_CATEGORY_TYPE)".

## 4.3 Setting Up Display Styles for Seeded Attributes

The configuration options for seeded attributes are limited to enabling/disabling seeded attributes, changing the attribute category and changing the display style.

Users can switch between multi-select and check box since they provide multi-select options. Users can switch between radio button and drop-down since they are single select options. Users cannot switch between multi-select and radio button, and so on because it will cause data issues on the back end. The "Percentage" display style does not have any seeded attributes.

Users can change the display styles as mentioned from attributes summary page or Attribute Details page by navigating to Administration tab > Partner horizontal navigation link > Attributes side navigation link.

The "Percentage" display style does not have any seeded attributes.

For information on seeded attributes, see Appendix C, "Seeded Attributes".

## 4.4 Setting Up LOV values for Seeded Attributes

Seeded attributes that are of type "list of values", have a display style of radio button, drop-down, multi-select, check box, and percentage. This may require the customer to define the range of values available for that attribute. LOVs are created within the UI itself. If a LOV attribute type is selected, users can create the LOV in the UI. The "Percentage" display style does not have any seeded attributes.

These fall into the LOV source of INTERNAL and LOOKUP.

For LOV source = INTERNAL, set up is done within the attributes administration module. Users can enter the attribute codes (values) by navigating to the Administration tab > Partner horizontal navigation link > Attributes side navigation link > View Values link in Summary Page.

For LOV source = LOOKUP, the lookup type is specified, otherwise the LOV source points to the table where the list of values are derived. Users can enter the attribute codes (values) based on its LOV source.

For information on the LOV set up, see the LOV setup required column in Table C–1 in Appendix C, "Seeded Attributes".

## 4.5 Setting Up Custom Attributes

Use attributes to create and track additional information about a partner 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 or remove attributes.

### Prerequisites

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Step

1. Click the **Profile Attributes** side navigation link.

   The Attributes - Overview page appears.

2. Click **Create**.

   The Create Attribute page appears.

3. Select an attribute type from the Attribute Type drop-down list.

   This determines how the values will be presented. The choices are:

   - List of Values
   - Derived
   - Text Box

4. Select a display style from the Display Style drop-down list.
5. Enter a name in the Name field.
6. Enter a description in the Description field.
7. Select a category from the Category drop-down list.
8. Select a Status as Active or Inactive.
9. Select the Expose to Partner check box to make the attribute visible in the partner tab.
10. Select the Requires Data Validation check box to send e-mail notifications to channel managers of that partner.
11. Select the appropriate Related To check box.

    The check boxes are entities for which the attributes have to be enabled. For example, if it is selected for Partner, the attribute is enabled for Partner Profile windows and users can set values of attributes for partners. The available entities are Partner, Partner Contact, Opportunity, and Lead.

12. Select a particular Country or accept the default as All.

13. Specify the types of partners to which this attribute applies:
    - Reseller
    - Original Equipment Manufacturer
    - Prospect
    - VAD
    - End User
    - All
14. Enable the attribute for either the Locator check box or the Matching Services check box.

    If the attribute type is LOV and text, the extra fields are No Of Lines (for Multi-Select and String display styles), Character Width (for String and currency display styles), Decimal Points (for Currency and Number display styles), Total (for Percentage display styles), and Value Type (for Number display styles).

    If the attribute type is Derived in the Other Information Section, a table is displayed with a text box to enter SQL text for all the entities that this attribute is checked for. Users can enter SQL text so that they can validate and update.
15. Click **Create**.
16. In the Attributes - Overview page, click the profile attribute name hyperlink.

    The Attribute Detail page appears.
17. Click **Profile Attribute Values** to add attribute values.

    The Attribute Details - Properties page appears.
18. Enter a value in the Attribute Value field.
19. Enter a description in the Description field.
20. Select the Inactive check box to make the attribute inactive.
21. Click **Apply** to save your changes.

## 4.6 Setting Up E-mail Notifications

For this release, custom attributes may be created and flagged as "require data validation". This means that whenever a partner user adds/updates an attribute value, e-mail notifications are sent to the channel managers of that partner if the attribute is defined as "require data validation". For e-mail notifications to be sent out:

- The profile "PV: Enable Workflow To send e-mails" must be set to Yes.
- The Workflow Notification Mailer program should be running.

# 5 Implementing Manual Partner Search

The sections in this chapter provides information on how to search for a partner manually while trying to route an opportunity to the partner.

- Section 5.1, "Overview"
- Section 5.2, "Implement Attributes"
- Section 5.3, "Setting Up Manual Matching Options"
- Section 5.4, "Setting Up Profile Options"
- Section 5.5, "Run Concurrent Programs"

## 5.1 Overview

The Manual Partner Search feature enables users to search for partners by specifying their own search criteria. Once the user is satisfied with partners found, they can be added to the partner assignment list of an indirect opportunity and then route it to the partners using the routing process.

## 5.2 Implement Attributes

Each of the search criteria that a user views, maps to an attribute. Only attributes that are active, enabled for matching (all seeded attributes are enabled for matching), and related to a partner are available to be used as search criteria.

For information on how to maintain or create seeded/custom attributes, see Chapter 4, "Implementing Profile Attributes".

## 5.3 Setting Up Manual Matching Options

With the Manual Matching feature, a list of attributes are compared against the available partners. To set up Manual Matching, select the attributes that should be compared and rank them in the order in which they should be compared.

When you set up the list of attributes to be used in manual matching, it is actually done at the responsibility level. That is, for each responsibility, you decide the attributes (search criteria) that should be enabled for that responsibility.

If there are no set ups done at the responsibility level, the user sees a list of all attributes that are active, enabled for matching and related to a partner.

### Prerequisites

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Step

1. Click the **Manual Matching Setup** side navigation link.

   The Partner Matching Options page appears.

2. Select a responsibility from the Responsibility drop-down list.
3. Enter a rank in the Rank field.

   The Rank number need not be unique.

4. Select an attribute from the Attribute drop-down list.

   This list is generated from the Attributes set up while creating attributes.

5. Click **Apply** to save your changes.

## 5.4 Setting Up Profile Options

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 5.5 Run Concurrent Programs

The following concurrent programs must be run:

- PV Refresh Attribute Text Table
- Spatial Information for Locations Batch Update

For more information, see Appendix D, "Concurrent Programs".

# 6

# Implementing Automatic Partner Matching

The following sections provide information on how to match partners using the partner matching engine:


- Section 6.1, "Overview"
- Section 6.2, "Implement Attributes"
- Section 6.3, "Setting Up Partner Matching Rules"
- Section 6.4, "Setting Up Profile Options"
- Section 6.5, "Run Concurrent Programs"


## 6.1 Overview

Automatic partner matching enables the matching of partners to indirect opportunities based on defined partner matching rules. The rule can be selected by the partner matching engine based on the criteria specified in the opportunity selection section of the rule, or the rule can be decided based on a profile option. The partners selected can then be added to the partner assignment list of an indirect opportunity and then routed to the partners using the routing process.

## 6.2 Implement Attributes

Similar to the manual search, each of the search criteria available in the rule definition maps to an attribute. Only attributes that are active, enabled for matching (all seeded attributes are enabled for matching) and related to a partner and an opportunity, are available to be used as search criteria.

For information on how to maintain or create seeded/custom attributes, see Chapter 4, "Implementing Profile Attributes".

## 6.3 Setting Up Partner Matching Rules

Automatic partner matching requires rules in order for the system to make the correct decisions.

### Prerequisites

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Steps

1. Click the **Partner Matching Rules** side navigation link.

   The Partner Matching Rules page appears.

2. Click **Create**.

   The Create Partner Matching Rule page appears.

3. Enter a name in the Name field.
4. Enter a description in the Description field.
5. Enter Start and End Dates.
6. Select a status of Active or Draft from the Status drop-down list.
7. Enter a value in the Precedence field.
8. Select a currency from the Currency drop-down list.
9. If the default owner is not correct, select a different owner.
10. Click **Create** to display the Partner Matching Details page.

    Drill down from the matching rule name till you come to the Rule Detail page and access links to the following pages from the context menu that is provided.

- Opportunity Selection
- Partner Selection
- Matching Criteria

- Geo-Proximity
- Tiebreak
- Routing

### 6.3.1 Add Opportunity Selection Criteria to the Partner Matching Rule

Use this procedure to add opportunity selection criteria to the partner matching rule. You can select attributes and assign a condition and a value to the attribute.

#### Prerequisites

Attributes must be set up and a partner matching rule must exist.

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Opportunity Selection link

#### Steps

1. Click **Add Attributes**.
2. The Attribute Page appears. On the Attribute Page complete the following:
    1. The first drop-down, lists the attribute categories. Select the category if you know it or select the blank option to display all attributes. This will cause the page to refresh with attributes that belong to the selected category.
    2. Now, select the attribute that needs to be added from the second drop down. This will again refresh the page with appropriate conditions for that attribute and the values. The conditions field displays different values depending on the attribute selected. The condition values supported are as follows:
    - Attribute of display style: Number or Currency or date
    - Condition values: Between, Equals, Greater Than, Greater Than or Equals, Is Not Null, Is Null, Less Than, Less Than or Equals, and Not Equals
    - Attribute of display style: Text
    - Condition values: Equals, Is Not Null, Is Null, and Not Equals

- Attribute of display style: Check Existance
- Condition values: Is Not Null, and Is Null

3. Select the appropriate condition.
4. The values section can render as a text field, or as a table or as a table with a LOV option.
   - If it is a text, enter appropriate values.
   - If it is a table, check the values that you wish to add.
   - If it is a table with an LOV option, use the LOV to add the values you need to add.

3. Click **Apply** to add this attribute or click **Apply And Add Another** to add this Attribute and display a new Attribute page.
4. Click **Cancel** to return to the Opportunity Selection page.

## 6.3.2 Add Partner Selection Criteria to the Partner Matching Rule

Use this procedure to add partner selection criteria to the partner matching rule. You can select attributes and assign a condition and a value to the attribute.

### Prerequisites

Attributes must be set up and a partner matching rule must exist.

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Partner Selection link

### Steps

1. Click **Add Attributes**.
2. The Attribute Page appears. On the Attribute Page complete the following:
   1. The first drop-down lists the attribute categories. Select the category if you know it or select the blank option to display all attributes. This will refresh the page with attributes that belong to the selected category.

2. Now, select the attribute that needs to be added from the second drop-down. This will again refresh the page with the appropriate conditions for that attribute and the values. The conditions field displays different values depending on the attribute selected. The condition values supported are as follows.
   - Attribute of display style: Number or Currency or date
   - Condition values: Between, Equals, Greater Than, Greater Than or Equals, Is Not Null, Is Null, Less Than, Less Than or Equals, and Not Equals
   - Attribute of display style: Text
   - Condition values: Equals, Is Not Null, Is Null, and Not Equals
   - Attribute of display style: Check Existance
   - Condition values: Is Not Null, Is Null
3. Select the appropriate condition.
4. The values section can render as a text field, or as a table or as a table with a LOV option.
   - If it is a text, enter appropriate values.
   - If it is a table, check the values that you wish to add.
   - If it is a table with an LOV, option use the LOV to add the values you need to add.

3. Click **Apply** to add this attribute or click **Apply And Add Another** to add this Attribute and display a new Attribute page.
4. Click **Cancel** to return to the Partner Selection page.

### 6.3.3 Add Matching Criteria to the Partner Matching Rule

In this step you relate attributes selected for the Opportunity to attributes selected for the partner.

#### Prerequisites

Attributes for both the opportunity and the partner must be defined and a partner matching rule must exist.

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Matching Criteria link

#### Steps

1. Select an Attribute from the drop-down list in the Opportunity Attribute column. The window will refresh as the Matching drop-down list is populated. The values in the Matching drop-down list are determined by the return type of the attribute selected in the Opportunity Attribute.
2. Select an operator from the Matching drop-down list.
3. Select a related Attribute from the Partner Attribute column. The attributes displayed in the drop-down list of Partner Attributes are attributes that have the same return type as the attribute selected in the Opportunity Attribute column.
4. Repeat steps 3 through 5 to add additional Matching Criteria to the Matching Rule.
5. Click **Apply** to save your changes.

### 6.3.4 Add Geographic Proximity to the Partner Matching Rule

In this procedure you assign a Geographic Proximity to the Partner Matching Rule.

#### Prerequisites

Attributes must be set up and a partner matching rule must exist.

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Geo-Proximity link

#### Steps

1. Enter a distance value in the Select Partner field.
2. Select a distance denomination of either miles or kilometers.

3. Enter a numeric value for the number of partners to select in the defined geographic proximity into the Select Nearest field.
4. Click **Apply** to save your changes

### 6.3.5 Add Tiebreak Criteria to the Partner Matching Rule

In this procedure you assign Tiebreak criteria to the Partner Matching Rule. The tiebreaking attribute is the attribute that will be compared if the opportunity and one or more partners compare equally.

#### Prerequisites

Attributes must be set up and a partner matching rule must exist.

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Tiebreak link

#### Steps

1. Enter a Rank number.

   The Attributes are compared in order of Rank.
2. Select an Attribute from the drop-down list in the Partner Attribute column.
3. Click **Apply** to save your changes.

### 6.3.6 Add Routing Information to the Partner Matching Rule

In this procedure you assign Routing information to the Partner Matching Rule.

#### Prerequisites

Attributes must be set up and a partner matching rule must exist.

#### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link > Routing link

### Steps

1. Select a type of routing for the Matching Rule from the following:
   - Joint
   - Multiple - Parallel
   - Multiple - Serial
   - Single
2. Select the Bypass Channel Manager Approval check box in order to skip Channel Manager Approval for this Partner Matching Rule.
3. Enter the Channel Manager Timeout in Days or Hours.
4. Enter the Partner Timeout in Days or Hours.
5. Click **Apply** to save your changes.

## 6.4 Setting Up Profile Options

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 6.5 Run Concurrent Programs

The following concurrent programs must be run:

- PV Refresh Attribute Text Table
- Spatial Information for Locations Batch Update
- Workflow Background Process - POL Automated Partner Matching

For more information on concurrent programs, see Appendix D, "Concurrent Programs".

# 7 Implementing Opportunity Routing

This chapter provides information on how to route an opportunity to a partner.



## 7.1 Overview

Opportunity routing is the process that routes the assignment of indirect opportunities, made by the vendor or VAD, to their selected partners. During opportunity routing, channel managers and partner contacts are identified. The assignment then passes through various stages of notifications and approvals before being presented to the partners. The routing process is complete once a partner accepts/rejects the assignment or the assignment is withdrawn.

In order to enable opportunity routing, the following setups need to be done.

## 7.2 Setting Up Timeouts

Timeouts are time periods during which an action is expected to take place. There are two timeout types:

- Channel Manager Timeout
- Partner Timeout

Channel Manager Timeout: 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

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Steps

1. Click the **Timeout Setup** side navigation link.

   The Timeout Setup page appears.

2. Select a timeout type from the Timeout Type drop-down list.

   The values are Channel Manager Timeout and Partner Timeout.

3. Select a country from the Country drop-down list.
4. Enter a value in the Timeout Period field.
5. Select the Remove check box to delete any existing timeouts.
6. Click **Apply** to save your changes.

## 7.3 Setting Up Status Notification

Oracle Partners provides a built-in workflow system that triggers automatic e-mail notifications to certain groups of people (that is as determined by their assigned role) at different stages in the opportunity and routing process. Notifications are sent out whenever the status changes. The status notification set up window defines which responsibilities should receive such e-mail notifications.

---

**Note:** The system checks for the appropriate e-mail 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

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Steps

1. Click the **Status Notification** side navigation link.

   The Status Notification page appears.

2. Select a status type from the Status type drop-down list.

   The values are Opportunity and Routing.

3. Select a status from the Status drop-down list.

4. Select if the following should receive notification upon a change in status for the following roles:

   - Partner
   - Channel Manager

- Account Manager
- Others

5. Select the Remove check box to remove any status notifications.
6. Click **Apply** to save your changes.

## 7.4 Setting Up Channel Types

Channel Types are used for prosecuting partner opportunities. Certain sales channels are made available to Oracle Partners by selecting them and marking them indirect. An indirect sales channel is one that is handled by a partner. There is one seeded sales channel for Oracle Partners which is the generic Indirect sales channel.

In addition, Sales Channels may be ranked with a precedence which will be used in the case of a tiebreak situation.

### Prerequisites

None

### Responsibility

Vendor Admin

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Steps

1. Click the **Channel Setup** side navigation link.

   The Channel Setup page appears.
2. Select a sales channel from the Channel drop-down list.
3. Select the Indirect check box to make the channel available for Oracle Partners.
4. Enter a value in the Precedence column to rank channels for the purposes of tiebreaking.
5. Click **Apply** to save your changes.

## 7.5 Setting Up Channel Managers

See *Oracle Sales Online Implementation Guide* (OSO) on how to setup a OSO user (salesrep). Users have to be given the Channel Manager JTF role.

## 7.6 Setting Up Partner Contacts

External users are classified under four different responsibilities: VAD User, VAD Administrator, Partner User and Partner Administrator. Each user must be set up in the Vendor's system so that the user can access Oracle Partners.

### Prerequisites

The user must be entered under the Person horizontal navigation link of the Customer tab.

### Responsibility

VAD User

VAD Administration

Partner User

Partner Administrator

### Navigation

Oracle Partners > Administration > Partner horizontal navigation link

### Steps

For information on how to create a contact, see "*Create a Contact*" in *Chapter 7, "Partner*" in *Oracle Partners User Guide*.

## 7.7 Corporate Open/Won Opportunity Bins

Perform the following steps to add bins to the partner user. These bins will be visible to the partner users.

### Prerequisites

None

### Responsibility

Partner User

Partner Admin

### Navigation

Oracle Partners > Profile > Oracle Partners

### Steps

1. Click the **Home Page** side navigation link.

   The Home Page Preferences page appears.

2. Click **Add New Rows**.
3. Select the Corporate Open Opportunities bin from the Bin Name LOV.
4. Select the Corporate Won Opportunities bin from the Bin Name LOV.
5. Select a bin number from the Bin Number LOV.
6. Select the Corporate Open/Won Bins Remove check box to remove the bins for vendor users and vendor admins, if they exist.
7. Click **Update** to save your changes.

## 7.8 Setting Up Profile Options

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 7.9 Run Concurrent Programs

The following concurrent programs must be run:

- Workflow Background Process - POL Assignment Routing
- PV Refresh of Partner Opportunity Bin Data
- Workflow concurrent program 'POL Notify Party'

For more information, see Appendix D, "Concurrent Programs"

## 7.10 Setting Up E-mail Notifications

For e-mail notifications to be sent out:

- The profile PV: Enable Workflow To send e-mails must be set to Yes.
- The Workflow Notification Mailer program must be running.

# 8 Implementing Locator Engine

The following sections provide information on how to match partners using the partner matching engine.

- Section 8.1, "Overview"
- Section 8.2, "Enable Attributes for Locator"
- Section 8.3, "Setting Up Profile Options"
- Section 8.4, "Run Concurrent Programs"

## 8.1 Overview

The locator engine allows the user to search for partners/resellers/VADs that are registered with Oracle Partners. 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 is installed and the URL would look like:

```
http://<machine_name>:port_number/OA_HTML/pvxLoctrSearch.jsp
```

The Locator engine uses the Oracle Partners database schema to retrieve the partner/reseller/VAD information. Please make sure that the Oracle Partners 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 by using the Admin > Attributes page.

## 8.2 Enable Attributes for Locator

Each of the search criteria the user views, maps to an attribute. Only attributes that are active, enabled for matching (all seeded attributes are enabled for matching), enabled for locator and related to partner are available to be used as search criteria.

For information on how to maintain or create seeded/custom attributes, see Chapter 4, "Implementing Profile Attributes".

## 8.3 Setting Up Profile Options

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 8.4 Run Concurrent Programs

The following concurrent programs must be run:

- PV Refresh Attribute Text Table
- Spatial Information for Locations Batch Update

For more information, see Appendix D, "Concurrent Programs".

# 9 Implementing Oracle iSupport

This chapter provides information on how to setup Oracle iSupport. This chapter contains the following section:

- Section 9.1, "Overview"

## 9.1 Overview

Oracle iSupport enables partner contacts to create service requests and get online help. The support tab is available for partners for knowledge management search, creating service requests, and so on.

For information about the set up of the necessary parameters for using the Service Request tab within Oracle Partners, see *Oracle iSupport Implementation Guide* and *Oracle iSupport User Guide*.

### 9.1.1 Setting Up Oracle iSupport

The Support tab provides access to the following horizontal navigation links:

- Ask me; used for Solutions Search for common problems
- View/Update; requests to view the created service requests and modify the existing service requests like changing the status, escalation and so on.
- Create Requests; used to create new service requests

#### Prerequisites

Setup the role for the log in user as IBU_REG_USER to access the Support tab.

Steps to setup the role are provided below:

Responsibility: JTF Administrator

Navigation: In the Registration Tab, Click **User Maintenance**.

Steps:

1. Search for a user with user ID or firstname or lastname from the LOV. Drilldown from the user to get the Roles button.
2. Click **Roles**.
3. Select the IBU_REG_USER from the Available Roles window.
4. Set up User Roles.
5. Click '>' to be selected into Assigned Roles window.
6. Click **Update** to save changes.

### Responsibility

Partner User

VAD User

Partner Admin

VAD Admin

### Navigation

Oracle Partners > Support

### Steps

For more information, see the *iSupport Implementation Guide*.

# 10

# Implementing Partner Programs

This chapter provides information on how to setup program profiles and consists of the following sections:

- Section 10.1, "Overview"
- Section 10.2, "Setting up Program Profiles"
- Section 10.3, "Run Concurrent Programs"
- Section 10.4, "Additional Setup Steps"

## 10.1 Overview

Programs enable vendors to create membership programs that offer special incentives and benefits for their channel partners. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, training, and so on. This tab offers the ability to:

- Create a partnership program and define program characteristics
- Edit a partnership program
- Develop links between programs to create parent and child relationships
- Define enrollment qualifications of a program
- Define vendor contact responsible for approving partner program enrollment
- Define the benefits of a program
- Define the payment terms of a program
- Define the terms and conditions associated to a program

- Display the number of partners enrolled in each program and allow drill down to specific partner data, and invite specific partners.

## 10.2 Setting up Program Profiles

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 10.3 Run Concurrent Programs

The following concurrent program is optional:

- PV: Close Ended Programs and Memberships

This concurrent program updates the status to "Closed" for all programs with program end date in the past of current system date.

For more information, see Appendix D, "Concurrent Programs".

## 10.4 Additional Setup Steps

The following steps have to be performed in addition to setting up program profiles and concurrent manager programs:

- Setting Up Locking Rules
- Setting Up Mandatory Rules
- Setting Up Program Approvers
- Program Overview Setup
- Setting Up Contracts
- Setting Up Offers
- Setting Up Price Lists
- Setting Up Benefits

### 10.4.1 Setting Up Locking Rules

Locking rules can be created to select fields that should be locked from any updates, once it is created.

As marketing objects transition from one status to another, certain aspects of the marketing object must be locked to prevent modification in the future. Locking rules determine fields that are no longer updatable as a marketing object achieves a new status.

#### Prerequisites

None

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner

#### Steps

1. Click the **Locking Rule** side navigation link.

   The Locking Rule page appears.

2. Select an object type from the Parent Object Type drop-down list.
3. Select an attribute from the Object Attribute drop-down list.
4. Select a status from the System Status drop-down list.
5. In the Locking Rule region, specify fields (on a program object) that should be locked in a particular program status.
6. Click **Update** to save your changes.
7. Click **Restore** if you do not want to save your changes.

### 10.4.2 Setting Up Mandatory Rules

Mandatory rules can be created to select fields that are required before a marketing object can be created.

Mandatory rules help the user interface respond to object transitions. For each marketing object, certain attributes are required to define it. The mandatory rules dictate which attributes of a marketing object are required.

#### Prerequisites

None

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner

#### Steps

1. Click the **Mandatory Rule** side navigation link.

   The Mandatory Rule page appears

2. Select an object type from the Parent Object Type drop-down list.
3. Select an attribute from the Object Attribute drop-down list.
4. In the Mandatory Rule region, specify mandatory fields (on a program object) using mandatory rules.
5. Click **Update** to save your changes.
6. Click **Restore** if you do not want to save your changes.

### 10.4.3 Setting Up Program Approvers

Approvers are defined by creating a program type through the administration section in Oracle Partners.

#### Prerequisites

None

#### Responsibility

Vendor Admin

#### Navigation

Oracle Partners > Administration > Partner Program Type > Create Partner Program Setup

#### Steps

1. Click the **Program Types** side navigation link.

   The Partner Program Types page appears.

2. Click **Create Type**.

   The Create Partner Program Type page appears.

3. Enter a name in the Partner Program Type Name field.
4. Enter a description in the Description field.
5. Select a partner type from the Partner Type LOV.

   Only partners of selected partner types, will be able to enroll in a program.

6. Enter a value in the Order field.
7. Select a type from the Type drop-down list.
8. Select an approver using the User/Role LOV.

   Approvers should have been provided the responsibility 'Workflow User Web Application' in order to enable them to approve/reject a program. When a user submits a program for approval, a notification will be sent to the approver that you selected for the program type.

   > **Note:** Program notifications are sent out using the generic framework developed by marketing called AMS GENERIC APPROVALS FRAMEWORK.
   >
   > For more information, see *Oracle Marketing Implementation Guide*.

9. Select a start date using the Start Date LOV.
10. Select an end date using the End Date LOV.
11. Click the Remove icon to delete an approver.
12. Click **Cancel** to go back to the Partner Program Type page.
13. Click **Apply** to save your changes.
14. Click **Revert** if you do not want to save your changes.

### 10.4.4 Program Overview Setup

Program overview content is stored in/retrieved from Oracle Content Manager (AME). If the profile value for 'IBC: Use Access Control' is set to No or Null, it does not need any extra setups to be done at AME. But, this option will enable any person who can access AME to change the content through AME UI.

If this profile which is available only at the site level, is set to 'Yes' (because of customer requirements for security in AME) access privileges have to be granted to all vendor users that can create/update/remove/approve program overview in AME windows.

Use the following steps to grant access privileges:

1. Create a JTA Resource Group, and include all the vendor users in that group.
   a. Log in to Forms Application with CRM Administrator responsibility.
   b. Click Resource Manager > Maintain Resources > Groups
   c. In Define Groups window, fill in the appropriate header information by giving suitable name to Resource Group, like "Vendor Users", and Description as "Group who can create/update/approve content in AME for Programs Overview".
   d. In the Members tab, fill in the resource names of vendor users.
   e. In the Usages tab, select Oracle Partners.
   f. Save the changes.
2. Grant access privileges this resource group in AME windows.
   a. Log in to HTML application with the user who has IBC Super User responsibility.
   b. Click on Foldering tab.
   c. Choose Group in Select drop-down, and fill in the details of above created resource group, and click **Go**, and select this resource group.
   d. For Folder Name of "PV Partner Programs Directory", select all the check boxes.
   e. Click **Submit**.
3. After implementation, if any new vendor users are added in the system, you need to add these users to above JTA resource group in order for them to create/update/approve Program Overview.

For more information, see *Oracle Content Manager Implementation Guide*.

## 10.4.5 Setting Up Contracts

Oracle Partners leverages the Oracle Contracts Core functionality to create and attach one or more contract templates for each partner program if partners are expected to sign the contract when they join a program. A contract template can be associated to a particular geography region within a partner program. Partners who subscribe to partner programs can review the terms and conditions associated with the contract template attached to this program and decide to accept, reject or print and fax the signed copy later.

For a contract to be available in the partner program module, users must create a Contract Template under the "Partner Contracts" category. Only contract templates created under "Partner Contracts" Category are available to use in Oracle Partners. While attaching a contract template in the partner program module, contract templates are displayed and not the actual contract. When a partner's enrollment is approved, a new contract is automatically created from the template by the application.

A new contract template can be created as follows:

### Prerequisites

None

### Responsibility

Contracts Administrator

### Navigation

Oracle Contracts > Contracts Navigator window > Tools

### Steps

1. Select the New Menu option to create a new contract template.
2. Select "Partner Contracts" as the category and click **Create**.
3. Enter a contract number to identify the template.
4. Select the Buy or Sell option for intent.
5. In the Details side navigation link, enter at least one group name.
6. Navigate to Actions > Save as Template.
7. Enter a Template Name.

   Optionally, you can enter the Adjustment.
8. Click **OK**.

#### Guidelines

In some situations you can open an existing contract and save it as a template. When you open a template within the Contract Authoring window you see the Template Name as a field instead of a Contract Number.

For more information on the Contracts Module, see *Oracle Contracts Core User Guide*.

### 10.4.6 Setting Up Offers

If offers functionality needs to be used (when certain discounts are offered for the enrollment fee from the Enrolled Partners window), the required Advanced Pricing setups need to be done.

For more information, see *Oracle Advanced Pricing Implementation Manual*.

### 10.4.7 Setting Up Price Lists

Different price lists can be associated to a program using the "Pricing & Payments" side navigation link. The side navigation link appears only when the 'Membership Fee Required' check box is selected for that program. Only pricelists created in Advanced Pricing/Order Management application can be associated here. New pricelists can be created by logging in to the applications and navigating to PriceList Setup window.

For more information, see *Oracle Advanced Pricing User's Guide*.

### 10.4.8 Setting Up Benefits

Different benefits can be associated to a program. Some of the benefits are seeded. The implementor can modify the seeded benefits and/or add new benefits using Lookups.

#### Prerequisites

None

#### Responsibility

Application Developer

#### Login

Log in to Oracle Forms

### Navigation

Oracle Forms > Lookups > Application Object Library

### Steps

1. Query for the 'PV_PROGRAM_BENEFITS' lookup type.
2. Add or modify the lookups.
3. Save your changes.

# 11

# Implementing Partner Enrollment

This chapter provides information on how to set up enrollment profiles and enrollment approvers. This chapter consists of the following sections:

- Section 11.1, "Setting up Enrollment Profiles"
- Section 11.2, "Run Concurrent Programs"
- Section 11.3, "Additional Setup Steps"

## 11.1 Setting up Enrollment Profiles

For information on profile options that have to be set, see Appendix B, "Profile Options".

## 11.2 Run Concurrent Programs

- PV: Send enrollment notifications to partner user. This concurrent program sends out following program related notifications to partners based on program definition
  - Renewal notifications: This notification is sent out to partners if their membership is about to expire or has expired. (based on program criterion)
  - Contract not received: This notification is sent out to partners if they have opted to fax a copy of the partnership contract and the vendor has not received it within specified time period.
- PV: Expire Ended Program Memberships, and Renew Early Renewed Program Memberships
  - This concurrent program will update membership status to 'Expired' for all partner organizations with membership end date (for one or more

programs) in the past of current system date, and will update the membership status to renew for all the early renewals whose start date is in past.

- PV: Process the errored enrollment requests for approval
  - Enrollment requests initiated by partners may not get routed for approval if the AME application errors out due to some reason. This concurrent program processes such enrollment requests and routes them to appropriate approver(s).

For more information, see Appendix D, "Concurrent Programs".

# 11.3 Additional Setup Steps

The following steps have to be performed in addition to setting up enrollment profiles and concurrent manager programs:

- Setting Up Address Validation
- Setting Up Order Management
- Setting Up Payment Server
- Setting Up Runtime Variables
- Setting Up Tax Rules
- Setting Up Enrollment Approvers using Oracle Approvals Management (AME)
- Setting Up Security for Enrollment Requests

## 11.3.1 Setting Up Address Validation

Receivables address validation system option needs to be set up as address validation is required for payment billing address to be validated on the fly against tax locations that are set up in Oracle Receivables.

For more information on how to set up the address validation system option, see the *Oracle Receivables User Guide*.

## 11.3.2 Setting Up Order Management

All the required Order Management setups need to be completed before using enrollment payment pages.

For information on the list of Order Management setups, see *Oracle Order Management Suite Implementation Guide* and *Oracle Order Management User Guide*.

### 11.3.3 Setting Up Payment Server

Payment server needs to be set up properly for using credit card payment method.

For information on how the payment server needs to be set up, see *Oracle iPayment Implementation Guide*.

### 11.3.4 Setting Up Runtime Variables

The jtt_cookie_path and jtt_cookie_domain java runtime variables need to be set up properly for transferring user cookie from https server to http server and vice versa. This is so that users need not explicitly enter user name and password again when switching from https to http and vice versa. This setup is needed only if payment pages need to be secure and rest of the pages non secure.

For information on how to use the java run time variables, see JTT documentation.

### 11.3.5 Setting Up Tax Rules

Tax rules need to be set up for calculating tax for membership fee.

For information on how rules should be set up, see the *Oracle Receivables Tax Guide*.

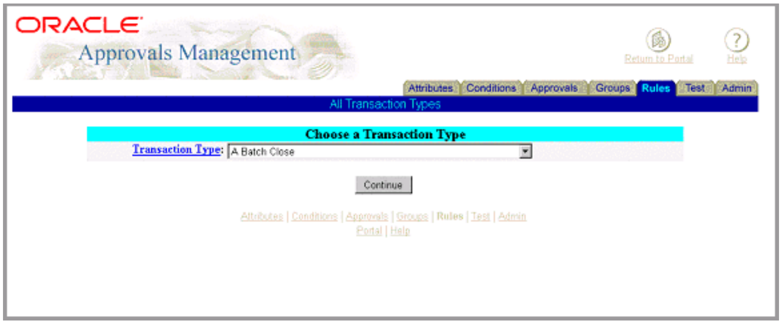
### 11.3.6 Setting Up Enrollment Approvers using Oracle Approvals Management (AME)

A partner joins a program by filling out all the required information in the enrollment form and at the end of the process, a thankyou page is displayed. At this point, the enrollment request is submitted for approval. A For Your Information (FYI) notification is sent by the system to the approver and the approver logs into the application and approves/rejects the request.

#### Setting up Approver for Enrollment requests

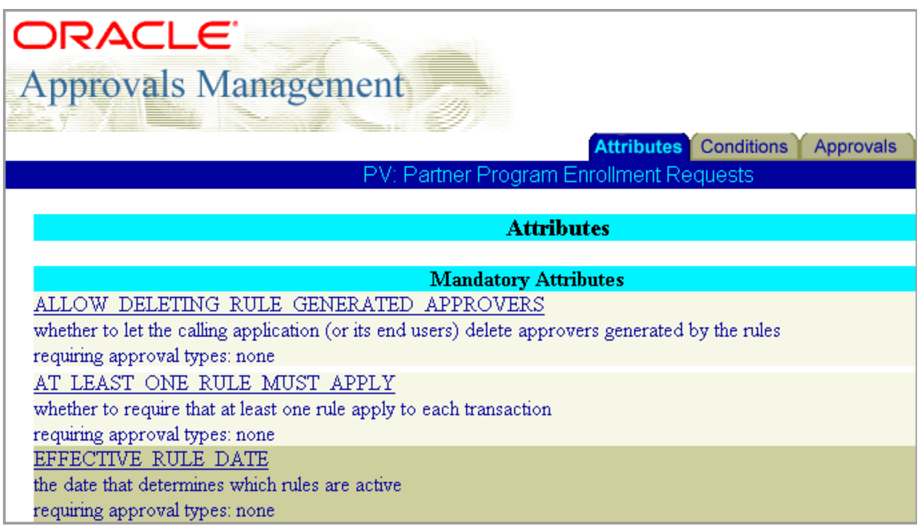
This has to be done through Oracle Approvals Management module.

1. First log in to self-service application as a user who has AME Application Administrator responsibility.
2. Click AME Application Administrator > Approvals. This brings up the AME page.




The Transaction Type used for Enrollment Approvals is PV: Partner Program Enrollment Requests (internally it is ENRQ).

### Attributes Tab




Click **Attributes** and select the above transaction type from the drop-down. You can see the mandatory and non-mandatory attributes pre-defined for the enrollment request approvals. You may not need to add new attributes. For information on adding new attributes, see *Oracle Approvals Management Implementation Guide*. You can only add non-mandatory attributes.

You can also look at how the existing non-mandatory attributes are defined and click **Add Attribute** and provide a new name. Be very careful if the attribute's value is based on a query. You would need to provide the query based on the syntax defined in the *Oracle Approvals Management Implementation Guide*.

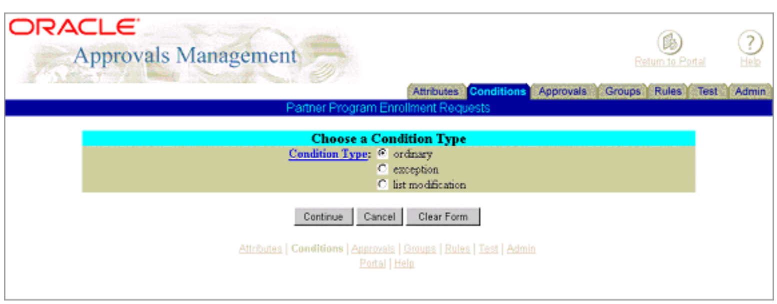
For example, a query for the Attribute COUNTRY.

Seeded attributes:

- Zip Code
- Program Name
- PV: PARTNER PROGRAM ENROLLMENT TYPE
- Country
- PROGRAM TYPE
- IS_END_USER
- IS_OEM
- IS_PROSPECT
- IS_RESELLER
- IS_VAD

### Conditions Tab

Click the Conditions tab and select the above transaction type from the drop-down. Click **Add Conditions** and select Ordinary.



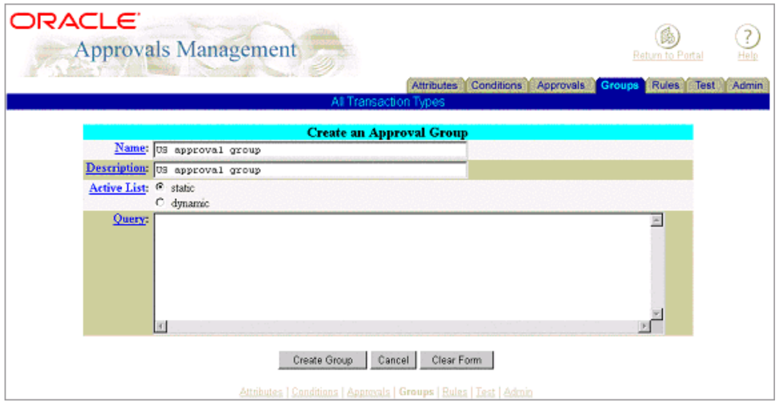

Select the attribute on which you want to set a condition. For example, select Program_Name and provide an attribute value. This should match exactly the program name your company has created through the Create Program window in the Oracle Partners application.

## Approval Tab

There is no set up required for this. But the approval type for enrollment approvals is approval-group chain of authority (chain of authority includes an approval group).

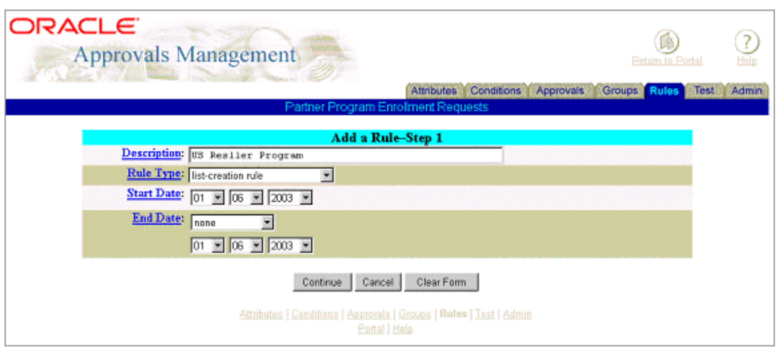

## Groups Tab

Click **Create Group**. This will take you to the detail window. Click **Add Approver**. Search for an approver and click **Continue** and then click **Create Member**. If there is more than one approver, pick the order in which the approvals has to be performed.

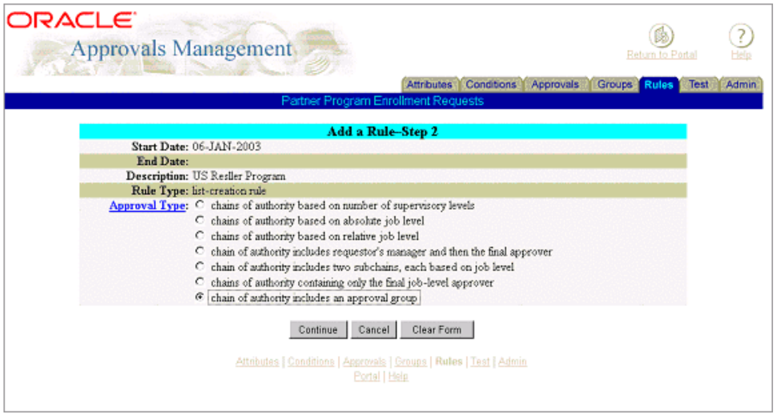



## Rules Tab

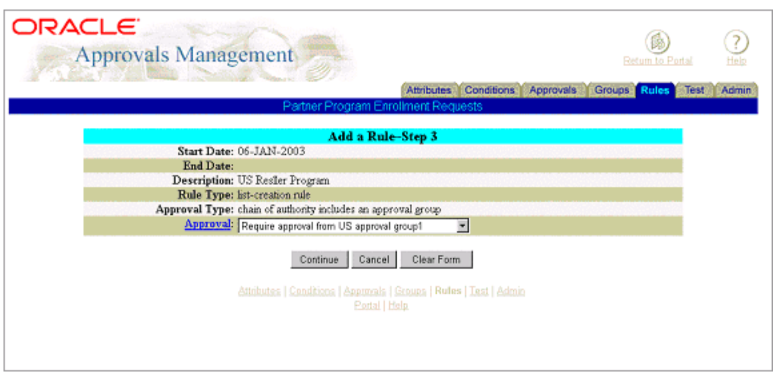
1. Click the Rules tab and select the above transaction type from the drop-down. Click **Add a Rule**.



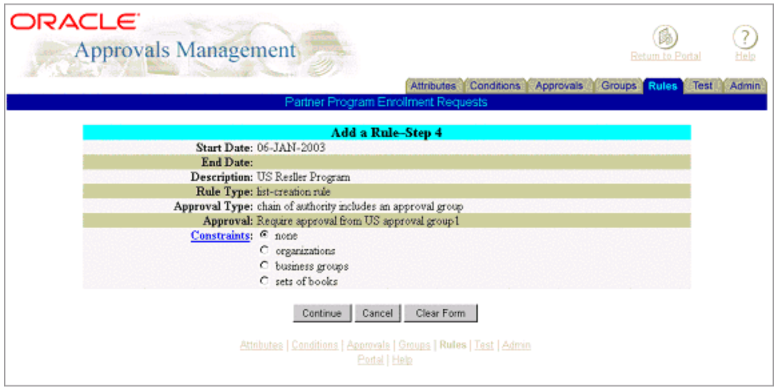

2. Enter a description and select Rule Type as list-creation-rule. Select the start date and end date appropriately. Click **Continue**.




3. Select Approval Type as 'Chain of authority includes an approval group' and click **Continue**.

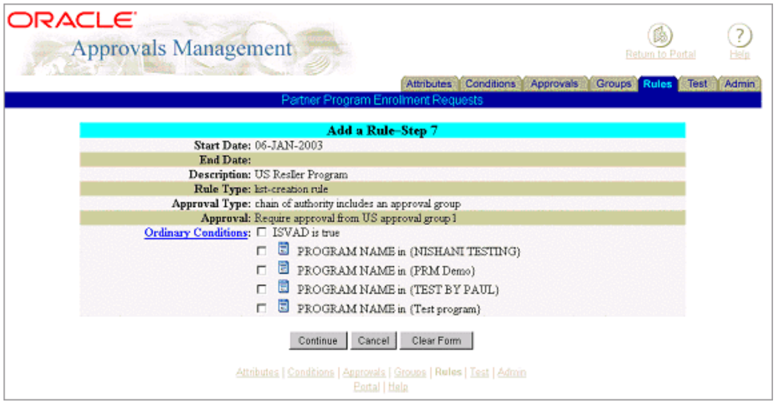



4. Select an Approval group from the drop-down and click **Continue**.




5. Select "None" for constraints and click **Continue**.


Select Ordinary-Condition attributes. Note that this is a multi-select box. So, if you are planning to create a rule based on more than one condition, select the attributes you are basing the conditions on and click **Continue**. This brings up a window that displays all the conditions created through the Conditions tab for all the selected attributes.

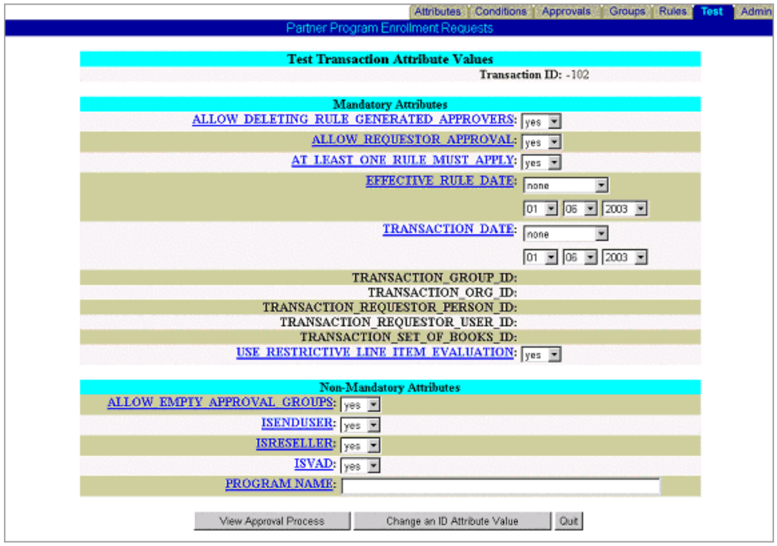



Select the conditions you want to associate with this rule and click **Continue**. A message "The rule you entered has been created" appears.

The partner enrollment request should now be routed to the approvers set up in the rule.

### Test Tab

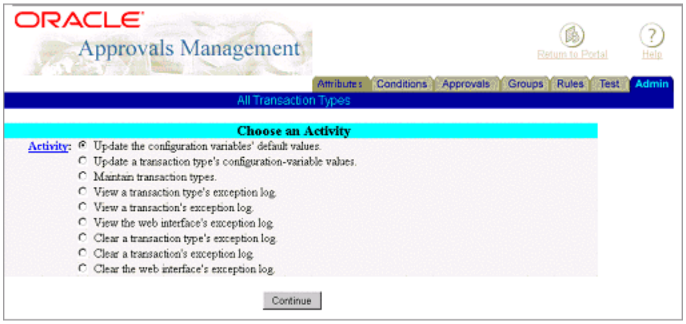
In the Test tab, select your transaction type and select "Create a test transaction". Click **Continue** and select Requestor Type as "None". Click **Continue** and the following window appears.




Provide the same attribute value that you gave in the conditions tab and check for the rule you defined in the List-Creation Rule. Click **View Approver List** to view the approver list.

## Admin Tab

There is a simple set up to define an admin user for your transaction type PV: Partner Program Enrollment Requests. This user will get a workflow notification from Oracle Approvals Management module, if there is any error in AME.




Select "Update a transaction types configuration-variable values" and click **Continue**. Click adminApprover: the person or user that AME identifies as the next approver when it raises an exception. Click **Continue** and query for an approver and assign the approver. The admin user should fix the issue in AME and run the concurrent program PV: Process the errored enrollment requests for approval. This re-submits the enrollment request so that the approval is routed to the correct business user.

## 11.3.7 Setting Up Security for Enrollment Requests

Administrators can see all the enrollment requests in the system, whereas, other users can only see the enrollment requests for which they are approvers, or the enrollment requests submitted by partners to which they have access to.

Administrator user is the user who has the resource role of "PV_VENDOR_ADMINISTRATOR". Associate this role to the resource by querying the resource.

### Prerequisites

Associate the "PV_VENDOR_ADMINISTRATOR" role to the resource by querying the resource.

### Responsibility

Vendor Admin

### Navigation

Resource Manager > Maintain Resources > Resources

### Steps

1. Fill in the resource details, and find the resource.
2. Click **Resource Details**.
3. In the Roles tab, associate the above role by adding a new row with role type as Oracle Partners, and Role as Partner Vendor Administrator.
4. Save the details.

# Part III

## Integration of Oracle Products

This section contains the following chapter:

- Chapter 12, "Oracle Partners Integrations"
- Chapter 13, "Verify the Implementation"

# 12

# Oracle Partners Integrations

Parts of Oracle Partners may not operate properly unless the following are not implemented. The following list displays all products integrated with Oracle Partners.

- Contracts
- Order Management
- Inventory
- iPayment
- Trade Management
- Pricing
- Oracle Content Manager
- Oracle Approval Management
- Territories
- Marketing: Potential partners can be targeted with marketing campaigns to convince them to enroll. Lead management is part of marketing.
- Sales Online: Opportunity Management and Forecasting
- iSupport: The Support tab is exposed to partners

# 13

# Verify the Implementation

This chapter contains information useful in verifying the implementation of Oracle CRM Application Foundation modules.

## 13.1 Oracle CRM Application Foundation Implementation Verification Tasks

After completing the implementation steps of the Application CRM Foundation module, run the entire suite of diagnostic tests available through the HTML Administrator Console.

### 13.1.1 Use the Diagnostic Tests

Implementors would most likely either verify using the Basic tab or the Advanced tab. In the Basic tab, you can run the following tests:

- RunAll
- UserTest
- AOLTests
- PropertyManager
- UserProfile
- AKData
- Security Manager

In the Advanced tab, you can modify the parameters used in the previously mentioned tests.

Each test generates a report if a problem is encountered. The report identifies the problem and provides a suggested resolution to the problem.

### 13.1.2 Verification Task List per Module

After you complete the configuration and set up of all the Oracle CRM Application Foundation modules, verify that you can perform the tasks outlined in the following table.

Table 13–1 lists the tasks to be performed.

***Table 13–1 CRM Application Foundation Verification List***

| JTF Module | Task | Reference |
|---|---|---|
| HTML Tech Stack | Login to HTML Applications as System Administrator | *Oracle CRM Technology Foundation Concepts and Procedures* |
| User Management | Register and approve a new user | *Oracle CRM Technology Foundation Concepts and Procedures* |
| Resource Manager | Creating an employee resource | *Oracle CRM Application Foundation Implementation Guide* |
| Resource Manager | Creating a group resource | *Oracle CRM Application Foundation Implementation Guide* |
| Resource Manager | Importing resources | *Oracle CRM Application Foundation Implementation Guide* |
| Resource Manager | Defining a resource group | *Oracle CRM Application Foundation Implementation Guide* |
| Resource Manager | Defining a resource team | *Oracle CRM Application Foundation Implementation Guide* |
| Territory Manager | Creating an individual territory | *Oracle CRM Application Foundation Implementation Guide* |
| Territory Manager | Using the Lookup Tool to find a salesperson | *Oracle CRM Application Foundation Concepts and Procedures* |
| Task Manager | Creating a task | *Oracle CRM Application Foundation Concepts and Procedures* |
| Notes | Creating a note for a task | *Oracle CRM Application Foundation Concepts and Procedures* |

**Table 13–1 CRM Application Foundation Verification List**

| JTF Module | Task | Reference |
|---|---|---|
| Assignment Manager | Assign a resource to a task | *Oracle CRM Application Foundation Concepts and Procedures* |
| Assignment Manager | Assign a resource to an escalated task | *Oracle CRM Application Foundation Concepts and Procedures* |
| Escalations | Escalate a task | *Oracle CRM Application Foundation Concepts and Procedures* |

You must be able to complete each task successfully, or your Oracle CRM Application Foundation modules will not work properly. If you are unable to complete a task successfully, then correct the problem before continuing.

# Part IV

## Appendixes

This section contains the following appendixes:

- Appendix A, "Acronyms"
- Appendix B, "Profile Options"
- Appendix C, "Seeded Attributes"
- Appendix D, "Concurrent Programs"

# A
# Acronyms

This appendix provides a list of acronyms used throughout this guide.

### AME
Oracle Approval Management

### AP
Accounts Payable

### AR
Accounts Receivables

### CRM
Customer Relationship Management

### DBA
Database Administrator. The person within an organization primarily is responsible for the deployment and maintenance of an Oracle database product.

### ERP
Enterprise Resource Planning

### GL
General Ledger

### GUI
Graphical User Interface

### HTML
Hyper Text Markup Language

### HR
Human Resources

### HRMS
Human Resources Management System

### JRE
Java Runtime Environment

### JSP
Java Server Page

### JTF
CRM Foundation modules

### LOV
The List of Values is a list that appears in various drop-down fields within Oracle Partners. These List of Values can be predefined or created from user entered information.

### MES
Marketing Encyclopedia System

### OCM
Oracle Content Manager

### OMO
Oracle Marketing

### OSO
Oracle Sales Online

**OTS**
Oracle TeleSales

**PIN**
Personal Identification Number

**PV**
Prefix associated with Oracle Partners

**QP**
Advanced Pricing

**SIC**
Standard Industry Code

**SQL**
Structured Query Language. Used to query databases.

**TCA**
Trading Community Architecture. Oracle's single customer database architecture for all types of customers.

**TM**
Trade Management

**UI**
User Interface

**UOM**
Unit of Measure

**URL**
Universal Resource Locator is the full name or path of a Web page or file location.

# B

# Profile Options

This chapter describes profile option settings that are required for successful implementation. Topics include:



## B.1 Setting Up Profile Options

Use the following procedure to set any profile option.

### Prerequisites

None

### Login

Log in to Oracle Forms

### Responsibility

CRM Administrator

### Navigation

Profile > System

### Steps

1. In the Find System Profile Values window, check the level(s) at which you want to set the profile option. The available levels are listed below:
   - **Site**: Indicates that profiles are set at the site level. This site level setting affects the entire database.
   - **Application**: If you select this level, choose the application from the Application LOV for which you want to set the profile option.
   - **Responsibility**: If you select this level, choose the responsibility from the Responsibility LOV for which you want to set the profile option.
   - **User**: If you select this level, choose the user from the User LOV for whom you want to set the profile option.
2. In the Profile field, enter the profile name, such as `IBE: Item Validation Organization`, or a wildcard search criterion such as `IBE%`.
3. Click **Find**.

   The System Profile Values form opens with the results of your search.
4. Verify or set the profile option(s) at the levels that you selected.

## B.2 Setting Up System Profiles

There are many system profile options in Oracle Partners. Many of the system profiles are from depending applications, such as Sales Online. The application abbreviation at the beginning of the profile name indicates the associated application.

### Prerequisites

None

### Login

Log in to Oracle Forms

### Responsibility

CRM Administrator

### Navigation

Functions > Profile > System

## Steps

1. Enter the profile name in the Profile Field and click **Find**.
2. Enter the appropriate value in the column corresponding to the level indicated.
3. Save your work.

Table B–1 lists the system profile options in groups, depending on the functionality they relate to.

***Table B–1 Profile Options***

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: Abandoned Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when a partner abandons an opportunity. The default is Yes. |
| PV: Active Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when an opportunity changes from routing to active status. The default is Yes. |
| PV: Allow Joint Selling By Partner | No | Site | Yes/No | If set to Yes, a partner may be able to add another partner or participate in joint selling. The default value is No. |
| PV: Bypass CM Approval for Campaign Routing | Yes | Site | Yes/No | Determine whether CM approval is required for partners matched by a campaign. This profile option is used in concert with PV: Enable Automatic Routing by Campaign. The default value is No. |
| PV: Common Currency for Rules Engines | Yes | Site | Any available currency | Base currency used for currency comparison in partner matching. If the currency specified for the rule is not the same as the base currency, it is converted to the base currency and then the comparison is performed. This profile is also used by the concurrent program PV Refresh Attribute Text Table. If not set, this value defaults to USD. |
| PV: Default Batch Assignment User | - | Site | A User | This user will be added to the sales team of an opportunity which failed to complete the full automated background Lead to Opportunity to Routing process. |

*Table B–1 Profile Options*

| Option | Required | Level | Setting | Effect/Limitation |
| --- | --- | --- | --- | --- |
| PV: Default CM TimeOut | - | Site | # of Hours | Sets the time period available to Channel Managers to review and approve partner matching and selection. If no response, the default response is Match Approved. |
| PV: Default Partner TimeOut | - | Site | # of Hours | Sets the time period available to Partner Contacts to accept the offered opportunity. If no response, the default response is Offer Declined. |
| PV: Default Routing Type | Yes | Site | Multiple-Parallel<br>Joint<br>Multiple-Serial<br>Single | Partners default assignment type. The default type is Single. |
| PV: Default Unassigned Opportunity TimeOut | - | Site | # of Days | Sets the time period an unassigned opportunity may have an Unassigned routing status. At the expiration of the time period, a concurrent manager program, PV Unassigned Opportunity Process After Timeout, will perform automatic matching and routing. |
| PV: Default Vendor Organization | - | All | Internal Vendor Organization | Select the Internal Vendor Organization to be used in establishing partner relationships. See Create Internal Organizations. |
| PV: Default Vendor User (Channel Manager) | - | Resp | A User | The default Channel Manager for opportunities for which a Channel Manager is not assigned. The default Channel Manager has full access to view opportunity detail and receives routing notifications. |
| PV: Display Submit Routing Button | - | All | Yes/No | Grant selected Vendor or VAD users the ability to route opportunities to partner. When set to Yes, a Submit Routine button is displayed on the Partner Channel page. This profile is not available to partner users. The default is No. |

*Table B–1 Profile Options*

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: Enable Automatic Routing by Campaign | - | Resp | Yes/No | Enables automatic routing based on campaigns. When the campaign field is completed, the system will add the associated partners to the sales team, opportunity routing list and start the routing process. The default is No. |
| PV: Enable Exchange Partner Flag | - | All | Yes/No | Enable the Exchange Partner check box to be displayed in the partner profile page. The default is Yes. |
| PV: Enable Partial Matching of Attributes | No | All | - | Enables the partner matching engine to return partners even if there is not an exact match for manual matching. The algorithm drops the lowest ranking search criteria and re-executes the search. This process is repeated until at least one partner is found or all search criteria are exhausted. This algorithm is also utilized by the concurrent program PV Refresh Attribute Text Table. |
| PV: Enable Sales Partner Flag | - | All | Yes/No | Enable the Sales Partner check box to be displayed in the partner profile page. The default is Yes. |
| PV: Enable Workflow to send e-mails | Yes | Site | Yes/No | If set to Yes, notifications are set via e-mail. The default setting is No. |
| PV: Enforce Address Filters in Partner LOV | Yes | Site | Yes/No | If set to Yes, in the partner LOV a second level filter page is displayed which will allow the user to search the partner based on name and address information. |
| PV: Java Class to Restrict ORG Access Privilege | - | Site | Java Class Filename | Customizable Java Class is available to restrict Partner/VAD users for accessing customer detail from the opportunity pages by clicking the customer link. The default logic provided checks the user against the ORG sales team for the customer before granting access. |

***Table B–1 Profile Options***

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: Locator Default Distance Unit | Yes | All | Distance Unit | Default distance unit for manual search. Also used for automatic matching if rule selected did not specify distance unit. This is also used by the reseller locator. The default value is Mile. |
| PV: Locator Distance | Yes | All | Numeric Value | The Reseller Locator will search for partners within this distance (default at site level is 10). |
| PV: Locator Maximum No of Partners | Yes | All | Numeric Value | The maximum number of partners returned when Reseller Locator is searching for partners. The default value for site is 15, other levels are defaulted to 20. |
| PV: Locator Partners Per Page | Yes | All | Numeric Value | The number of partners displayed per page. The default value is 10. |
| PV: Locator Proxy Port | Yes | Site | - | Proxy Server Port (default value is 80) |
| PV: Locator Proxy Server | Yes | Site | - | Proxy Server Profile (default value is `www.proxy.us.oracle.com`) |
| PV: Locator Server Timeout | Yes | All | Time in milliseconds | Timeout for the Elocation Request. The default value is 20000 milliseconds. |
| PV: Locator Server URL | Yes | Site | - | PV Locator URL used to get the service (default value is `http://elocation.us.oracle.com/servlets/lbs` |
| PV: Locator Skip eLocation Server | Yes | Site | Yes/No | If Yes, the system will not use the eLocation server and perform geo-proximity analysis based on radial distances only. |
| PV: Locator TCP Request Content Type | Yes | Site | - | Locator TCP request content type (default value is application/x-www-form-urlencoded) |

*Table B–1 Profile Options*

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: LOV Access Privilege | - | Site | Access<br>My<br>All | Restricts which contacts can be displayed in the partner contact LOV used in user registration and contact summary page.<br>For vendor login: Access, My can see only partner contacts for which the vendor user is on the sales team. All can see all partner contacts.<br>For partner login: Access, My can see only partner contacts for which the partner user is on the sales team. All can see all partner contacts for his organization.<br>For VAD login: Access can see only the partner contacts for which the VAD user is on the sales team (including indirectly managed partners). My can see all partner contacts for his organization regardless of whether the VAD user is on the sales team.<br>All can see all partner contacts for his organization and his indirectly managed partners. |
| PV: Matched Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when an opportunity is matched with a partner. The default is Yes. |
| PV: Matching Rule Selected by Engine | Yes | User | Yes/No | When this profile is set to Yes the Matching Rule is selected by the Rules Engine in automatic matching. The default value is No.<br>See Profile PV: Rule for Automatic Matching. |
| PV: Max Number of Matched Partners | Yes | Site | - | Maximum number of partners returned during partner matching (manual and automatic). If the value is not specified, the number of partners returned is 10. |
| PV: Maximum Users | - | Site | Numeric Value | Limits the number of users a partner may have. The default is 100. The default is 100. |

***Table B–1 Profile Options***

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: Offered Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when an opportunity changes from matched to offered status. The default is Yes. |
| PV: Recycled Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when approval is declined by all channel managers. The default is Yes. |
| PV: Require Opportunity Contact for Manual Routing | - | Resp | Yes/No | When set to Yes, a contact name for the opportunity is required for manual and batch routing to start. If set to No, a contact name is not required. The default is No. |
| PV: Require Vendor User (CM) Approval for Manual Routing | - | Resp | Yes/No | This setting determines the display of the Bypass Channel Manager Approval flag. If set to Yes, the check box is not displayed. If set to No, the check box is displayed. If set to No, the user may bypass the channel managers approval and route the opportunity directly to partner contacts for review and acceptance. The default is Yes. |
| PV: Restrict Sales Team Partner Contact LOV | - | Site | Yes/No | For customer external sales team, if Y, restrict the display of contacts to those partners for which the sales team member has access. |
| PV: Rule for Automatic Matching | Yes | User | Yes/No | If the profile, PV: Matching Rules Selected by Engine is set to No, this profile is used to determine which rule to use for automatic matching. |
| PV: System Login URL | | Site | URL | Enter the system login URL to be displayed in e-mail notifications. |
| PV: Trace for Auto Matching | No | All | Yes/No | If set to Yes, automatic partner assignment process trace will be displayed in the UI for debugging. The default value is No. |
| PV: Unassigned Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification for a new unassigned opportunity. The default is Yes. |

*Table B–1 Profile Options*

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| PV: User Framework | - | Site | Yes/No | If set to Yes, the system will use the JTF User Management Framework for registration of external users. The default is Yes. |
| PV: Withdrawn Notification Flag | - | User | Yes/No | If set to Yes, the user will receive e-mail notification when an opportunity changes from offered to withdrawn status. The default is Yes. Default to Y if not set. |
| PV: Enable Web Marketing | - | Site, Resp and Appl | Yes/No | This is used to enable eMarketing Web advertisements in the home page. It is required if Web marketing advertisements need to be exposed to Oracle Partners users. |
| AMS: System Timezone | Yes | Site | - | Timezone where system programs and concurrent manager programs run. |
| Applications Server-Side Proxy Host and Domain | NO | Site | Applications Server-Side Proxy Host and Domain | This is used by the TCA concurrent program, Spatial Information for Locations Batch Update. |
| HZ: Spatial Provider URL | Yes | All | A URL | A URL for Spatial Information on Location (Default at site level is `http://elocation.oracle.com/elocation/lbs`). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update. |
| HZ: Web Server Proxy Host Name | No | All | Web Server Proxy Name | This is used by the TCA concurrent program, Spatial Information for Locations Batch Update. |
| HZ: Web Server Proxy Port | No | All | Web Server Proxy Port | This is used by the TCA concurrent program, Spatial Information for Locations Batch Update. |

***Table B–1 Profile Options***

| Option | Required | Level | Setting | Effect/Limitation |
|---|---|---|---|---|
| OS: Auto Convert Lead to Opportunity | Yes | Site | Yes/No | If Yes, the system converts indirect leads to opportunities and perform automated rule-based partner assignment. |
| OS: Customer Access Privilege | Yes | Resp | Sales Team | This profile option must be set to Sales Team for the following responsibilities:<br>VAD Admin<br>VAD User<br>Partner Admin<br>Partner User |
| OS: Opportunity Access Privilege | Yes | Resp | Sales Team | This profile option must be set to Sales Team for the following responsibilities:<br>VAD Admin<br>VAD User<br>Partner Admin<br>Partner User |
| OSO: Default Sales Group and Role | Yes | Site | User Defined | Default Sales Group and Role |

# B.3 Oracle Partners Dependent Product Profile Options

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

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

**Oracle iSupport:** The following mandatory profile options must be set up within iSupport. See *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

## B.4 Oracle Partners 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

Table B–2 describes all the profile options in Oracle Partners.

***Table B–2 Profile Options***

| Module | Profile Name | Level | Default | Default value | Description |
|---|---|---|---|---|---|
| Locator | PV: Locator Proxy Port | SARU | None | - | Proxy Server port number |
| Locator | PV: Locator Proxy Server | SARU | None | - | Proxy Server address |
| Locator | PV: Locator Server URL | SARU | Site | `http://elocation.oracle.com/servlets/lbs` | PV Locator URL used to get the elocation service |
| Locator | PV: Locator Skip eLocation Server | SARU | Site | N | If `Y', system will skip eLocation server and perform geo-proximity analysis based on radial distances only |
| Locator | PV: Locator TCP Request Content Type | S | Site | application/x-www-form-urlencoded | Locator TCP request content type |
| Locator | PV: Locator Distance | SARU | Site | 10 | The Reseller Locator will search for partners within this distance |

*Table B–2 Profile Options*

| Module | Profile Name | Level | Default | Default value | Description |
|---|---|---|---|---|---|
| Locator | PV: Locator Default Distance Unit | SARU | Site | mile | Default distance unit used for manual search. Also used for automatic matching if rule selected did not specify distance unit. This is also used by the reseller locator |
| Locator | PV: Locator Maximum No Of Partners | SARU | Site | 15 | The Maximum no of partners returned when Reseller Locator is searching for partners. If not set, default to 20 |
| Locator | PV: Locator Partners Per Page | SARU | Site | 10 | No of partners that can be displayed per page in reseller locator. If not set, default to 10 |
| Locator | PV: Locator Server Timeout | SARU | Site | 20000 | Timeout for ELocation Request used in reseller locator |
| Manual Matching | PV: Enable Partial Matching of Attributes | SARU | None | - | Enables the partner-matching engine to return partners even if there is not an exact match for manual matching. The algorithm used is if no partners are returned for the search conditions specified, the lowest ranked condition is dropped and the search engine will perform the search again. This process continues until at least one partner is found or all the search conditions are exhausted. Default to N if not specified. |
| Both Matching | PV: Common Currency for Rules Engines | SARU | None | - | Base currency used for currency comparison in partner matching. If the currency specified for the rule is not the same as the base currency, it is converted to the base currency and then the comparison is done. The concurrent program PV Refresh Attribute Text Table also uses this. If not set, default to USD. |
| Both Matching | PV: Max Number of Matched Partners | SARU | Site | - | Maximum number of partners returned during partner matching (manual and automatic). If value is not specified, it defaults to 1000. |
| Both Matching | PV: Skip Elocation for Partner Matching Service | SARU | None | - | If Y, system will skip eLocation server and perform geo-proximity analysis based on radial distances only. System will default to N if value is not set. |

*Table B–2 Profile Options*

| Module | Profile Name | Level | Default | Default value | Description |
|---|---|---|---|---|---|
| Auto Matching | PV: Matching Rule Selected By Engine | SARU | None | - | When this profile is Yes the Matching Rule is selected by the Rules Engine in automatic matching, if it is N or not set, it defaults to N. |
| Auto Matching | PV: Rule for Automatic Matching | SARU | None | - | If profile PV: Matching Rule Selected By Engine is N, this profile is used to determine which rule to use for automatic matching. |
| Auto Matching | PV: Trace for Auto Matching | SARU | None | - | If set to Yes automatic partner assignment process trace will be displayed in the UI for debugging. If not specified, it default to N. |
| Routing | PV: Unassigned Opportunity Timeout (Days) | S | Site | 10 | Number of days indirect Opportunity has stayed unassigned. Used by concurrent program 'PV - Unassigned Opportunity process after timeout'. |
| Routing | PV: Abandon Notification flag | U | None | - | User can enable/disable notification when opportunity is abandoned. Default to Y if not set. |
| Routing | PV: Active notification flag | U | None | - | User can enable/disable notification when partner accepts opportunity. Default to Y if not set. |
| Routing | PV: Allow Joint Selling By Partner | S | Site | N | Enable/disable joint selling by VAD with their partners. Determines whether routing type Broadcast-Joint can be selected by VAD. |
| Routing | PV: Bypass CM Approval for Campaign Routing | SAR | Site | Y | Determine whether CM approval is required for partners matched by a campaign. This profile option is used on concert with PV: Enable Automatic Routing by Campaign. The default is No |
| Routing | PV: Default Batch Assignment User | SR | None | - | This user will be added to the salesteam of an opportunity which fails to complete automated background partner routing. |
| Routing | PV: Default CM Timeout | S | Site | 24 | Default channel manager timeout in hours if not specified at the country level. |
| Routing | PV: Default Partner Timeout | S | Site | 24 | Default partner timeout in hours if not specified at the country level. |

*Table B–2 Profile Options*

| Module | Profile Name | Level | Default | Default value | Description |
|---|---|---|---|---|---|
| Routing | PV: Default Routing Type | SARU | Site | SINGLE | Default Assignment Type used by background partner routing. |
| Routing | PV: Default Vendor User (Channel Mgr.) | SAR | None | - | Default Channel Manager used if none found for partner. |
| Routing | PV: Display Submit Routing Button | SARU | Site | N | Enable/disable ability for user to submit/withdraw assignment routing. |
| Routing | PV: Display Submit Routing Button | SARU | App | Y | Oracle Partners profile to enable user to submit routing. |
| Routing | PV: Enable Automatic Routing by Campaign | SAR | Site | N | Enable/disable automatic assignment routing in campaign-based partner routing. If N, partners are added to opportunity salesteam. |
| Routing | PV: Enable Workflow To send e-mails | SAR | Site | N | Enable/disable e-mail notification in Oracle Partners. |
| Routing | PV: Matched notification flag | U | None | - | User can enable/disable notification when opportunity is matched. Default to Y if not set. |
| Routing | PV: Offered notification flag | U | None | - | User can enable/disable notification when opportunity is offered to partner. Default to Y if not set. |
| Routing | PV: Recycled notification flag | U | None | N | User can enable/disable notification when opportunity is recycled. Default to Y if not set. |
| Routing | PV: Require Opportunity Contact for Manual Routing | SAR | Site | N | Allow/disallow assignment routing if there are no opportunity contacts. |
| Routing | PV: Require Vendor User (CM) Approval for Manual Routing | SAR | Site | Y | Default for the 'Bypass channel manager approval' check box. |

***Table B–2 Profile Options***

| Module | Profile Name | Level | Default | Default value | Description |
|---|---|---|---|---|---|
| Routing | PV: System Login URL | S | None | - | URL sent with the workflow notification |
| Routing | PV: Unassigned notification flag | SARU | None | - | Unassigned notification flag |
| Routing | PV: Withdrawn notification flag | U | None | - | User can enable/disable notification when opportunity is recycled. Default to Y if not set. |

## B.4.1 Setting up Program Profiles

Table B–3 lists the profiles required to be set up for partner programs.

*Table B–3 Program Profiles*

| Option | Required | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| PV: Concatenated Inventory Flex Segments for Program | Yes | Resp/Appl/Site | Free flow text | This value is used to populate the key flexfeild segment values while creating the program as an inventory item internally. The value should be in the following format: Segment1.Segment2.Segment3.Segment4 etc. Etc.is just to denote as many segments as implemented. Here Segment1, 2,3… should be the values of the key flexfield segments that will be used for inventory item creation from program. '.' is delimiter that should be used along with these segments.One of the segment values should have the code PV_PRGM_FLEX_CODE. This code will be replaced with first five characters of program name concatenated with program_id while creating the inventory item. So, for example, the value could be US.SOFTWARE.EBUS.PV_PRGRM_FLEX_CODE where US, SOFTWARE are key flexfield segment Values, and '.' is delimiter. |
| AMS : Item Validation Master Organization | Yes | Site/Appl/Resp/user | Organization Name | Inventory Organization in which program will be created as inventory item. |

*Table B–3 Program Profiles*

| Option | Required | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| PV: System Login URL | Yes | Site | `http://servername:port/OA_HTML/jtflogin.jsp` | This url is embedded in the program/enrollment related workflow notification sent to partner and vendor users. Clicking on the link will take you to the login page through which approver can view the details of the program. |
| PV:Self Service URL with Workflow Notification | Yes | Site | `http://servername:port/OA_HTML/US/ICXINDEX.htm` | This url is embedded in the program approval request notification sent to vendor users. |
| PV: Is External Responsibility | - | Responsibility | Yes/No | If this profile is set to 'yes' for a given responsibility, system will display this responsibility in the LOV on the program benefits page. If this profile is set to 'no' for a given responsibility, system will not display this responsibility in the LOV on the program benefits page. |
| IBC: Use Access Control | No | Site | Null or No | Setting value to 'No' or 'Null' skips the security check in Oracle Content Management while creating the content for program through Summary window.<br><br>See also Program Overview Setup in Chapter 10, "Implementing Partner Programs". |

***Table B–3 Program Profiles***

| Option | Required | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| QP: Source System Code | Yes | Site/Appl/User | "Oracle Pricing" at Oracle Partners application level | Oracle Pricing: This value means only the price lists that are created from 'Oracle Pricing' product will be recognized while associating the price lists with Partner Program object. |

## B.4.2 Setting up Enrollment Profiles

Table B–4 lists the profiles required to be set up for program enrollments.

***Table B–4 Enrollment Profiles***

| Option | Required | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| PV: Default Enrollment Request Approver | Yes | Site/Application | - | When AME does not return an approver, the enrollment request would be in queue of this approver. |
| PV: Program Enrollment Request Reminder Notification Duration | Yes | Site/Application | 15 | Reminder duration in days. If action is not taken within this interval, reminder notification will be sent after every interval. |

*Table B–4 Enrollment Profiles*

| Option | Require d | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| PV: Allow Approval Without Contract | Yes | Site | Yes/No | Yes: During enrollment request approval, system will allow approver to approve the request even though the contract is not signed (online or hardcopy) by the partner.<br><br>No: During Enrollment request approval, system will not allow approver to approve the request if the contract is not signed (online or hardcopy) by the partner. |
| PV: Default Salesperson used for Orders | Yes | Site | Should be the salesperson name picked up from the LOV. | This person will be associated while creating the order in Order Management for partner enrollment. You can select a dummy salesperson if you do not want the sales quota to be associated to this salesperson for partner enrollments. |
| PV: Order Cancel Reason | Yes | Site | All the available cancel reason codes from OM cancel lookup (CANCEL_ CODE) | This profile option value is used as cancel reason when an order needs to be cancelled either because a partner user cancelled an enrollment request when he is in the payments section or because the approver rejected a enrollment request submitted by a partner. |
| PV: Non Shippable Order Transaction Type For Partner Program Enrollment Requests | Yes | Site | All the available transaction types for ORDER type (OE_ORDER_ TYPES_V view) | Since the orders are non shippable and invoiceable orders, profile option value has to be one of the BILL ONLY transaction types with invoice option enabled. This is used as transaction type for creating orders. |

*Table B–4 Enrollment Profiles*

| Option | Required | Level | Available setting choices | Effects of profile option and what limitations it places on the application or on other settings |
|---|---|---|---|---|
| PV: max number of credit card authorization | No | Site | A number is expected | If credit card authorization fails for these many times consecutively, partner will not be allowed to change payment information. Instead, we redirect user to home page. If this profile value is not set, the number is defaulted to 3. |
| OM: Payment method for Credit Card Transactions | Yes | Site, Application,Responsibility, and user | Default method for credit card transactions | This credit card transaction method is used to figure out merchant ID from Receivables, which is required when getting credit card authorizations from iPayment. |
| PV: Secure URL | No | Site | This profile option needs to be set to secure server and port that should be used in payment pages | If this profile is set, payment pages will use this secure (https) server and port. Otherwise, the regular port in payment pages will be used. Example of this profile option value: `http://qapache.us.oracle.com:2000/OA_HTML/` |
| PV: Non Secure URL | No | Site | This profile option needs to be set to non secure server and port that should be used after processing payment | If the profile is set, the server and profile mentioned will be used to switch to non secure url once payment has been processed. Otherwise, the same port that is used in payment pages will be used. Example of this profile option value: `http://qapache.us.oracle.com:1111 /OA_HTML/` |

# C

# Seeded Attributes

For LOV Source = INTERNAL, setup is done within the attributes administration module. For LOV Source = LOOKUP, the lookup type is specified. Else, LOV Source points to the table where the list of values are derived.

Table C–1 describes all the seeded attributes in Oracle Partners.

***Table C–1 Seeded Attributes***

| Attribute Name | Category | Display Style | LOV setup required | LOV Source | Enabled for |
|---|---|---|---|---|---|
| Functional Expertise | General | Multi-select | - | AS_INTEREST_TYPES_VL, AS_INTEREST_CODES_VL | Partner |
| Partner Types | General | Check box | Y | INTERNAL | Partner |
| Country | General | Multi-select | - | FND_TERRITORIES_VL | Lead, Opportunity, Partner |
| Industry | General | Multi-select | Y | LOOKUP ( PRM_IND_CLASSIFICATION_TYPE) | Opportunity, Partner |
| Geographic Coverage | General | Multi-select | Y | INTERNAL | Opportunity, Partner |
| Additional Channel Offering | General | Multi-select | Y | INTERNAL | Lead, Opportunity |
| Partnership Activity | General | Multi-select | Y | INTERNAL | Opportunity, Partner |
| Partner Name | General | Text box | - | - | Partner |
| Campaign | General | Long LOV | - | AMS_P_SOURCE_CODES_V | Lead, Opportunity, Partner |

*Table C–1 Seeded Attributes*

| Attribute Name | Category | Display Style | LOV setup required | LOV Source | Enabled for |
|---|---|---|---|---|---|
| Capacity Rating | General | Single-select | Y | INTERNAL | Opportunity, Partner |
| Partner Level | General | Single-select | Y | INTERNAL | Partner, Opportunity |
| State | General | Multi-select | - | AR_LOCATION_VALUES | Lead, Opportunity, Partner |
| Customer Name | General | Long LOV | - | AS_CUSTOMER_LOV_V | Opportunity, Lead |
| Customer Address Specified | General | Existence Check | - | - | Lead |
| Customer Annual Revenue | General | Currency | - | - | Partner, Opportunity, Lead |
| Primary Contact Specified | General | Existence Check | - | - | Lead |
| Contact Role | General | Single-select | - | AS_LOOKUP (LEAD_ CONTACT_ROLE) | Lead |
| Purchase Timeframe | General | Single-select | - | AS_LOOKUP (DECISION_ TIMEFRAME) | Lead |
| Budget Status | General | Single-select | - | AS_LOOKUP (BUDGET_ STATUS) | Lead |
| Lead Score | General | Numeric | - | - | Lead |
| Lead Status | General | Single-select | - | AS_STATUSES_VL | Lead |
| Total Budget | General | Currency | - | - | Opportunity, Lead |
| Product Interest | General | Multi-select | - | AS_INTEREST_TYPES_VL, AS_INTEREST_CODES_VL | Opportunity, Lead |
| Purchase Quantity - Product | General | Numeric | - | - | Lead |
| Purchase Amount - Product | General | Currency | - | - | Lead |

**Table C–1 Seeded Attributes**

| Attribute Name | Category | Display Style | LOV setup required | LOV Source | Enabled for |
|---|---|---|---|---|---|
| Response Channel | General | Single-select | - | AS_LOOKUP (VEHICLE_ RESPONSE_CODE) | Lead |
| Project | General | Long LOV | - | AS_SALES_LEADS | Lead |
| Qualify Flag | General | Single-select | - | AS_LOOKUPS (FLAG) | Lead |
| Lead Rating | General | Single-select | - | AS_SALES_LEAD_ RANKS_VL | Lead |
| Sales Channel | General | Single-select | - | ASO_I_SALES_ CHANNELS | Opportunity, Lead |
| Creation Date | General | Date | - | - | Lead |
| Total Purchase Amount - Product | General | Currency | - | - | Opportunity, Lead |
| Total Purchase Amount - Solutions | General | Currency | - | - | Lead |
| Purchase Quantity - Solutions | General | Numeric | - | - | Lead |
| Purchase Amount - Solutions | General | Currency | - | - | Lead |
| Primary Contact Phone Specified | General | Existence Check | - | - | Lead |
| Area Code | General | Text box | - | - | Lead |
| COUNTY | General | Text box | - | - | Lead |
| PROVINCE | General | Text box | - | - | Lead |
| CITY | General | Text box | - | - | Lead |
| POSTAL CODE | General | Text box | - | - | Lead |
| PRIMARY CONTACT E-MAIL ADDRESS SPECIFIED | General | Existence Check | - | - | Lead |
| Opportunity Status | General | Single-select | - | AS_STATUSES_VL | Opportunity |

*Table C–1 Seeded Attributes*

| Attribute Name | Category | Display Style | LOV setup required | LOV Source | Enabled for |
|---|---|---|---|---|---|
| Sales Stage | General | Single-select | - | AS_SALES_STAGES_ALL | Opportunity |
| Close Date | General | Date | - | - | Opportunity |
| Offer | General | Long LOV | - | AMS_P_SOURCE_CODES_V | Opportunity |
| Win Probability | General | Single-select | - | AS_FORECAST_PROB_ALL_VL | Opportunity |
| Sales Methodology | General | Single-select | - | AS_SALES_METHODOLOGY_V | Opportunity |
| Customer/Account_Type | General | Single-select | - | LOOKUP (CUSTOMER_ACCOUNT_TYPE) | Opportunity, Lead |
| Routing Status | General | Single-select | - | LOOKUP (PV_ROUTING_STAGE) | Opportunity |
| Customer Category | General | Single-select | - | LOOKUP (CUSTOMER_CATEGORY) | Opportunity, Lead |
| Classification | General | Single-select | - | AS_INTEREST_TYPES_VL, AS_INTEREST_CODES_VL | Opportunity |
| Partner Enrollment Date | General | Date | - | - | Partner |
| VAD Relationship Exists | General | Existence Check | - | - | Partner |

# D

# Concurrent Programs

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 specific roles available in Territory Manager, Channel Manager and Partner Contact.
- While setting up a partner territory, 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.

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

### Prerequisites

None

### Login

Log in to Oracle Forms

### Responsibility

CRM Administrator

## Navigation

Setups > Concurrent Requests

## Steps

1. Click **Submit a New Request**.

Table D–1 lists the concurrent manager programs and their descriptions.

***Table D–1 Concurrent Manager Programs***

| Concurrent Manager | Required | Description |
|---|---|---|
| PV Refresh Attribute Text Table | Yes | This program allows the attribute details for a particular partner to be used in the matching process. |
| PV Unassigned Opportunity Process After TimeOut | Yes | 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 | Yes | This program refreshes the materialized view used in Home page to display the partner opportunity Bin. |
| PV Close Ended Programs and Memberships | Optional | The concurrent program updates status to 'Closed' for all programs with program end date in the past of current system date. |
| PV Expire Ended Program Memberships, and Renew Early Renewed Program Memberships | Optional | This concurrent program will update membership status to 'Expired' for all partner organizations with membership end date (for one or more programs) in the past of current system date, and will update the membership status to renew for all the early renewals whose start date is in past. |
| PV Process the errored enrollment requests for approval | Optional | Enrollment requests initiated by partners may not get routed for approval if the AME application errors out due to some reason. This concurrent program processes such enrollment requests and routes them to appropriate approver(s). |

**Table D–1 Concurrent Manager Programs**

| Concurrent Manager | Required | Description |
|---|---|---|
| PV Send enrollment notifications to partner user | Yes | This concurrent program sends out following program related notifications to partners based on program definition.<br>Renewal notifications: This notification is sent out to partners if their membership is about to expire or has expired. (based on program criterion)<br>Contract not received: This notification is sent out to partners if they have opted to fax a copy of the partnership contract and the vendor has not received it within specified time period. |
| Spatial Information for Locations Batch Update | Yes | Acquire latitude and longitude values for locations in the TCA registry. For addresses that already have spatial data, the program updates the records with the latest information from eLocations. (See *Oracle Trading Community Architecture eLocations Spatial Data Integration User Guide*.) |
| Workflow Background Process - OMO Triggers | Optional | In order to implement triggers, Workflow Background Process must be run for the item type OMO Triggers. Note that System Administrator (or any other user running this program), will require the proper JTF resource and be added to the Fulfillment Server Group in order to send e-mail through triggers. |
| Workflow Background Process - POL Assignment Routing | Yes | Process channel manager time-out and partner time-out activities in opportunity routing.<br>Item_type: POL Assignment Routing<br>Process Deferred: N<br>Process Timeout: Y<br>Process Stuck: N |
| Workflow Background Process - POL Automated Partner Matching | Yes | Perform automated partner matching and routing of converted opportunities to partners.<br>Item_type: POL Automated Partner Matching<br>Process Deferred: Y<br>Process Timeout: N<br>Process Stuck: N |

*Table D–1 Concurrent Manager Programs*

| Concurrent Manager | Required | Description |
|---|---|---|
| Workflow Background Process - POL Notify Party | Yes | Send e-mail notifications to channel managers when partner creates opportunities.<br>Item_type: POL Notify Party<br>Process Deferred: Y<br>Process Timeout: N<br>Process Stuck: N |

# Glossary

### activity

An activity is a business action performed by an agent such as sending a fax, updating a service request, or creating a note.

### approval

An optional feature in User Management, approval is where approvers can reject or approve new user accounts. In the User tab, the System Administrator Console provides windows so you can view, create, modify, delete, enable, and disable approvals, including those for specific organizations.

### approval flow

The approval flow is a predefined flow of steps required to approve user registration or service enrollment requests in User Management.

### Assignment Manager

The Assignment Manager is a tool that helps you assign resources to a task or a document.

### assisted assignment option

The Assisted Assignment option is used to assign a resource to a task or a document based on predefined criteria in the Assignment Manager.

### attachment

An attachment is any document associated with one or more application modules. You can view attachments as you review and maintain a module. For example, operating instructions, purchase order, notes, item drawings, presentations, or an employee photo can be an attachment.

### attribute

Additional characteristics, traits or descriptions about an object (that is Partner, Opportunity) in the system. Attributes are user-configurable and can be added anytime.

### automatic assignment

Automatic Assignment refers to the matching of territories to resources resulting in a "Winning Territory" in Territory Management.

### Business Rule Monitor (BRM)

The Business Rule Monitor is the engine that monitors documents over time against user-defined business rules.

### business rule workbench

The Business Rule workbench is used to define a business rule in BRM.

### business user

A business user is a typical B2B user, associated with an organization. Generally, the primary user(s) of the same organization approves these users.

### campaign

A marketing effort comprising many number of different techniques for reaching customers or prospects.

### calendar

Calendar is a tool to effectively manage your daily activities, appointments, and tasks.

### collateral

Collateral is a static fulfillment document that does not contain merged data. It is usually some sort of marketing brochure or some other document. It is sent in an e-mail as an attachment. It is often called a deliverable in the marketing applications.

### concurrent manager

The concurrent manager is a process manager that coordinates the processes generated by users' requests to run various data-intensive programs. An Oracle applications product group can have several concurrent managers.

### contact

A contact contains information about a person and how to locate them such as, their phone number and e-mail address.

### control tower

The Control Tower is a window in Field Service where you can view resource availability or assign resources to a task.

### customer

Customers are typically primary users, Business to Business (B2B) users, business to Customer (B2C), and (individual) users.

### customer relationship escalation

A customer relationship escalation is an escalation document that escalates multiple support requests, defects, or tasks.

### customization

Customizations are enhancements to an Oracle Applications system made to fit the needs of a specific user community.

### database monitor

The database monitor checks the database activity following a database crash or disconnect from the database in Fulfillment. This monitor temporarily shuts down the Fulfillment server into a sleep mode until connection to the database can be re-established.

### defect

A defect is a document that tracks product problems and resolutions in Escalation Management. A defect can be escalated without an associated service request. It is escalated Oracle Quality Online (OQO), formerly known as the Defect Management System.

### detail window

A Detail window displays information about a specific open request, campaign, or output device in Fulfillment.

### dynamic mode

Dynamic qualifiers are used to control the number of territories after creating a mass number of territories in Territory Management. The values of both transaction and resource dynamic qualifiers are exclusively mixed together while assigning them to the new territories.

### effective dates

Effective dates are the dates a territory, member assignment, and so on, is effective, or to be in use.

### employee

An employee is a resource type that represents a person who is hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).

### enrollment

Enrollment is a set of add-on services that you can receive during or after registration in User Management. One enrollment corresponds to zero or one responsibility, zero or one template, zero or one approval and zero or more roles. Enrollments are application specific and can be tied to user types.

### Escalation Management

Escalation Management is a tool used to reprioritize, reassign, and monitor a situation to a satisfactory completion.

### escalation

To escalate something, such as a process means to increase in extent or intensity.

### escalation plan

An escalation plan is a series of follow up tasks that are attached to the escalation document.

### escalation territories

Escalation territories provide you with the ability to define the escalation path in the event of exceptions. This is necessary for all administrative purposes and accountability purposes. Territory based escalation definition will provide you with the multi-level escalation path for each territory. When defining a territory, the user has the option of designating the escalation territory. An escalation territory must be defined with the escalation flag checked before it will be present in the Escalation list of values (LOV).

### explicit enrollment

Explicit enrollments are enrollments that you manually register for during the registration process from the "Register Here" link in User Management.

### form

Forms are a logical collection of fields, regions, and graphical components that appears on a single window. Oracle applications forms resemble paper forms used to run a business. You enter data by typing information in the form.

### forms server

A Forms server is a type of application server that hosts the Forms server engine. It mediates between the desktop client and the database, providing input windows for the Forms-based products on the desktop client and creating or changing database records based on user actions.

### framework

A framework is a collection of collaborating classes. The interaction framework dictates the architecture. It defines the overall structure, its partitioning into classes and objects, the key responsibilities, how the classes and objects collaborate, and the thread of control.

### Fulfillment

Fulfillment is a tool used to automate the way you send information to customers. It provides the ability to immediately satisfy a customer’s requests for information, literature, and other correspondence.

### fulfillment administrative console

Fulfillment Administrative Console is used to configure fulfillment servers, group, templates, queries, and locate request statuses and histories.

### fulfillment administrator

A fulfillment administrator is a person at a management level who is responsible for creating and managing Fulfillment functions.

### fulfillment agent

An agent or user is the person who initiates a Fulfillment request from within a CRM application. Agents usually interact directly with customers, either on the phone or face-to-face. In Web-based self-service applications, a customer or prospect may be the requesting agent.

### fulfillment agent windows

The fulfillment agent's windows is set of agent Java Server Pages (JSPs) that are provided to CRM applications for creating basic Fulfillment requests.

### fulfillment request

A fulfillment request is the entity that is created when a request is passed to fulfillment APIs. If a request is successful, then an e-mail is generated.

### fulfillment server

The Fulfillment server (or engine), a Java-based multi-threaded server, processes the requests, merges data into master documents, dispatches final output, and logs completed request in fulfillment history table, as well as, write to Interaction History tables if the party ID is passed.

### fulfillment server monitors

The Fulfillment server has a set of internal monitors each with a specific task to ensure proper functioning of the Fulfillment server, including: process monitor, request monitor, command monitor, remote monitor, database monitor, and schedule monitor.

### full access

Full Access provides you with the ability to read and edit, and delete a record. This access type does not include the capability of granting access to others.

### Gantt Chart

The Gantt chart provides a graphical overview of the scheduled tasks for resources.

### geography

Used to define the geographical breakdown and hierarchy used by an organization.

### group

A group is a set of agents or users usually related by a workgroup, function or department. Each user must belong to at least one group. These groups are associated with a Fulfillment server.

### GUI

An interface used with personal computers and workstations that allows the user to access fields and regions of the window with a pointing device, typically a mouse. The acronym is pronounced "goo-ee".

### Home

The Home tab is the first tab the user sees when they log onto Oracle Partners. The Home tab contains a number of bins and available reports as well as links in certain bins to recently accessed marketing objects.

### HTML (hypertext markup language)

HTML is a simple language used to format documents, predominantly for viewing with a Web browser. Portions of text or images, called hypertext, can be associated with other documents.

### HTTP (Hypertext transfer protocol)

The TCP/IP-based network protocol used to transmit requests and documents between an HTTP server and a Web browser.

### HTTP listener

An HTTP listener is a program on an HTTP server that accepts and processes incoming HTTP requests from Web browsers.

### implicit enrollment

These are enrollments that a user is automatically signed up for during the registration process from the "Register Here" link In User Management. The user is not asked to register for these enrollments. Instead, they are automatically attached to the user upon registration.

### individual user

An individual user is an individual with no relationship to an organization in User Management. Generally, no approval is required for this type of user.

### integration points

Fulfillment integrates with other application products through APIs included with the core Fulfillment product.

### intelligent assignment option

The intelligent assignment option is used to assign the resource with the lowest cost to a task in the Assignment Manager.

### interaction

An interaction is a touch point that occurs between a customer, a customer system, a resource, or a resource system. An example of a touch point is a phone call between an agent and a customer. Interactions include activities, media, and media items.

### Interaction History (IH)

IH provides CRM applications with a common framework for capturing and accessing all "interaction" data associated with customer contacts. IH acts as the central repository and provides a consistent API for tracking all automated or agent-based customer interactions.

### items

Items can be master documents, collateral, or attachments in Fulfillment. Items are inserted in the body of an e-mail. Items are selected from the list of all possible documents and collateral material available to the user from Fulfillment templates.

### JAR (java archive) file

JAR files are a collection of Java classes compressed into files for faster download to a desktop client.

### Java class

Java Classes are components of a Java program that define objects and operations performed on objects. A Java class also identifies an operating system file that contains a program or part of a program written in Java.

## Jinitiator

Oracle Jinitiator enables end users to run Oracle Developer Server applications directly within Netscape Navigator or Microsoft Internet Explorer on the Windows 95, 98, or 2000 and Windows NT 4.0 platforms. Implemented as a plug-in (Netscape Navigator) or ActiveX component (Microsoft Internet Explorer), Oracle JInitiator allows you to specify the use of Oracle's Java Virtual Machine (JVM) on Web clients instead of having to use the browser's default JVM.

## JSP

Java server pages are an extension to the Java servlet technology that was developed by Sun as an alternative to Microsoft's ASPs (Active Server Pages). JSPs have dynamic scripting capability that works in tandem with HTML code, separating the page logic from the static elements - the actual design and display of the page.

## JTF_APPROVER Permission

JTF_APPROVER Permission gives you access to view requests assigned to you.

## JTF_PRIMARY_USER Responsibility

The JTF_PRIMARY_USER responsibility gives the Primary User access to approve requests.

## JTF_PRIMARY_USER_SUMMARY Permission

The JTF_PRIMARY_USER_SUMARY permission, which is part of the JTF_PRIMARY_USER role, gives a user access to view requests assigned to them and the Universal Primary User Approver for your organization.

## JTF_REG_APPROVAL Permission

The JTF_REG_APPROVAL Permission combined with the JTF_SECURITY_ASSIGN_ROLE Permission gives you system administrator access to User Management. With this permission, you can view and respond all requests in the system.

## JTF_SECURITY_ASSIGN_ROLE Permission

The user, who has the JTF_SECURITY_ASSIGN_ROLE permission combined with the JTF_REG_APPROVAL Permission gives you system administrator access to User Management. With this permission, you can view and respond to all requests in the system.

### Link

A hyperlink to another Page.

### master document

A Master Document is a static or dynamic HTML, PDF, or zip file in Fulfillment.

### media

In Interaction History, media represents the communication channel through which an activity takes place. Examples can include: the phone, the fax machine, an ATM, or a cell phone.

### media device

A media device is a type of media controller that resides outside of software. Not all media have media devices in Interaction History. An example of a media device is a phone.

### media item

Media items represent a communication occurrence that is handled by a CRM application or user. They are generated by a customer directly, the agent, the system, or a CRM application and can be inbound or outbound. Media items are multiple types of communication associated with an interaction. They are generated by a customer, the system, or an application and can be inbound or outbound.

### media item life cycle

A Media Item Life Cycle is a unit of time associated with the handling of a media item in Interaction History. For example, a call that is in the ACD queue for 10 seconds, the IVR for 20 seconds, worked by agent "JSMITH" for 45 seconds and then by agent 'JDOE' for 20 seconds has four segments in its lifecycle.

### media meta data

Media Meta Data is data that is associated with a particular type of media. The information adds additional context to the media or provides information on how to gain access to the media. Examples of media meta data include IVR, ANI, DNIS for telephone calls, and To, From, Subject, and Classification for e-mails.

### media provider

A media provider is the source or entry point of media into a call or service center. It can be the creator of the media of the gateway by which media enters the system.

Often it will provide a staging area for the media to reside in until it is ultimately delivered to the consumer. Examples of media providers are ACD queues, predictive servers, and e-mail servers.

### media type

A media type describes the broad classification that a media item can be grouped into in Interaction History. Media that fall into a single media type typically have the same media provider, queuing, and media controller. Examples of media types are e-mail, inbound telephone calls, outbound telephone calls, mail, ATM, and faxes.

### membership level

Particular levels of participation within a partner program. Membership levels exist within a partner program and can offer partners special incentives and benefits.

### merchant administrator (system administrator)

The merchant or system administrator is the main administrator of a company who approves requests for primary, business, and individual users. This administrator, who has the JTF_REG_APPROVAL permission, sees all the pending requests to be approved and is able to approve them.

### merchants

Merchants refer to the implementor of the Oracle E-Business Suite. This term is used to clear up any confusion with the term “customers”, which refers to customers of a business using Oracle products as opposed to those implementing the product.

### merged Data

Merged data is a the specific chunk of data that has been taken from several sources and merged together in Fulfillment. For example, if a company wants to send a thank you e-mail to everyone that has inquired about their company, the resulting merged data is the query retrieving all customers that have inquired about the company.

### Multi Org

Used to describe the capacities of Oracle products to accommodate multiple organizations in multiple countries with differing currencies and languages.

### notes

Notes is a tool that provides additional text locations where you can specify more detail, if needed. A note can be added to a task.

### note status

There are three statuses available for notes:

- Private: Only the creator can view it.
- Public: The creator and others can read or write to it.
- Publish: Publishable over the Internet. Everyone can view it.

### note text

A large type note, such as a customer's letter or directions.

### note type

Note types are selected up from the lookup tables. You can add note types through the setup window. They provide a further categorization to the notes based on a user's individual needs. Also, a note type can be tied to a source type and such note types are visible only to that mapped source. Therefore, you must choose between the entire note types that have been defined for your source and those which do not have any source type attached to them.

### number of winners

The Number of Winners field is used to specify the maximum number of potential winning territories in Territory Management.

### object

An object is any identifiable individual or thing. It can be physical, such as a telephone or PBX, or an abstract concept, such as a market campaign in Interaction History.

### OMO

OMO is an acronym for Oracle Marketing.

### OSO

OSO is an acronym for Oracle Sales Online.

### other/TBH

Other/THB is the only resource that is created and not imported in the form-based version of Resource Manager. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.

### output

The output is the delivery medium of a Fulfillment request. Currently, only e-mail is supported.

### Owner

The owner of an Object.

### partner

A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits.

### partner type

A type of partnership with specified terms and conditions, i.e. Value-Added Distributor (VAD), Value-Added Reseller (VAR), System Integrator (SI), ISP (Independent Software Provider), Supplier, Manufacturer, and so on.

### party

A party is a person, group, or organization and is owned by TCA. Party relates to an employee, customer, or organization that can be related to a task.

### Page

A HTML page viewed in a browser.

### Personalize

A function that allows a user to customize many different pages to accommodate his specific needs.

### platform

Within a resource category, there could be numerous platforms in skills management. A resource can be rated individually for each of those platforms. Platforms can be rated with the following: Foundation, intermediate, skilled, advanced, expert, or N/A.

## PL/SQL

PL/SQL is a procedural extension of SQL that provides programming constructs such as blocks, conditionals, and functions.

## port

In TCP/IP and UDP networks, a port is an endpoint to a logical connection. The port number identifies what type of port it is. For example, port 80 is used for HTTP traffic.

## primary user

A primary user is a designated person of an external organization, like a business partner, who is responsible for some administrative functions on behalf of the external organization in User Management. In the case of registration the primary user is responsible for managing the registration and maintenance of users, accounts, and enrollments. Primary users of different parties may have access to different responsibilities and they may be granted different access rights.

## problem code

Within a category in skills management, there could be numerous problem codes. A resource can be rated individually for each of those problem codes. Problem codes can be rated with the following: Foundation, intermediate, skilled, advanced, expert, or N/A.

## process monitor

The process monitor observes the states of the internal server processes that process the Fulfillment Requests. This monitor makes sure that the correct number of processes are allocated for performing work on the internal request queue.

## product

Within a category in skills management, it is possible to have numerous products. A resource can be rated individually for each of those products. A product can be sub-divided into components. Products can be rated with the following: foundation, intermediate, skilled, advanced, expert, or N/A.

## profile option

A profile option is a set of changeable attributes that affect the way Oracle applications appear and how they function.

### program

Programs enable vendors to create membership programs that offer special incentives and benefits for their channel partners. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, training, and others.

### prospect

A prospect is a person who is a candidate to purchase a product or service in Fulfillment.

### proxy server

A server that sits between a client application, such as a Web browser, and a real server. It intercepts all requests to the real server to see if it can fulfill the requests itself. If not, it forwards the request to the real server.

### qualifiers

Qualifiers are used to define Territories in Territory Management.

### query

A query is a SQL statement or list created by the administrator (or an external other) that is used to merge specific data with a master document in Fulfillment. Queries can be used for batch lists, mass mailings, or mail blitzes.

### rank

Rank is used to specify the priority of a territory among territory random selection. In Territory Management. It is used with number of winners.

### read-only

Read-only access provides you with read-only capability. You cannot edit or delete any information.

### Record

A collection of related fields. All of the fields in a record contain data relating to a single item.

### reference

A reference occurs when one task relates to another document. For example, a task can be related to a service request.

### reference document

A reference document is a document that is linked to an escalation document in Escalation Management. For example, a service request (number 9229) is escalated to Jane Doe in escalation document (number 11749). This service request (number 9229) is a reference document.

### reference type

A reference type specifies whether a reference document is escalated or used to provide additional information in Escalation Management.

### registration

Registration is the process by which any user gains some access to the application's functionality.

### registration self-service administration UI

The registration self-service Administration UI is used by system administrators, and at times Primary users, to maintain external organization or internal group, users, parties, and accounts in User Management.

### registration self-service user UI

The Registration self-service user UI is used by the primary, individual, or business users to register themselves in User Management.

### registration templates

Applications require varying pieces of information to register different types of users in User Management. Registration Templates refer to JSP files that are used to capture the registration information that is special to a particular User Type or Enrollment.

### remote monitor

Its function is to monitor commands received through the fulfillment server's command port. This port is set in the fulfillment server start script with the flag "-Dengine.CommandPort=#####". Without this command port, this monitor will not run.

### repeating task

A repeating task is repeated in specified time increment such as daily, weekly, monthly, or yearly.

### request monitor

The request monitor checks the Advance Queue (AQ) for incoming Fulfillment Requests and places them, in a self-limiting fashion, into an internal request queue where they can be fed into the processes.

### request owner

The request owner is the current approver based on the approver list and current state of workflow defined for a given approval in User Management. The request owner is only able to approve the requests which they currently own. This user should have "JTF_APPROVER" permission. The request owner is tied to the JTF_UM_APPROVAL_OWNER profile option.

### resource

A resource is the basic element of the Resource Manager and is defined as people, places and things.

### resource category

There are five types of resources defined in Resource Manager: party, employee, partner, supplier contact, other/to be hired (TBH).

### resource component

Within a product in skills management, there are numerous components. A resource can be rated individually for each of those components. Components can be rated with the following: foundation, intermediate, skilled, advanced, expert, or N/A.

### Resource Manager

The Resource Manager is a tool used to define, access, and maintain all CRM and ERP Resources.

### resource qualifiers

Resource Qualifiers are the criteria used specifically in selecting resources in Territory Management.

### resource skill category

A resource skill category is the highest level that a resource can be rated in relation to skills management. If a resource is rated at the category level, and not rated at any one of the product, platform, or product code levels, it does not imply the resource is also rated at those levels. Categories can be rated with the following: Foundation, intermediate, skilled, advanced, expert, or N/A.

### responsibilities

Responsibilities are groupings of application menus that determine the user interface accessible to a particular user.

### role

Roles are groupings of permissions, which are page level and function level granular privileges used to maintain application security.

### role type

A **role type** is a collection of roles associated with a particular CRM module.

### schedule monitor

The schedule monitor observes the configured activity schedule for the fulfillment server. The fulfillment server can be configured for active and inactive scheduling throughout a day. When it is scheduled to be inactive, the fulfillment Server enters a sleep state until the beginning of the next activity period. This monitor only runs if the fulfillment server has been configured with a startup time and shutdown time in the fulfillment administration console.

### self-service registration

Rather than asking an administrator to register users manually, users can register themselves through a self-service UI in User Management. Self-service registration includes UI and the background processes used to complete the registration process. This involves assigning users the correct data and UI access privileges.

### service request

A service request is a document that tracks information about a customer's product and service problems.

### servlet

A servlet is a Java program executed on an HTTP server, rather than downloaded to a desktop client.

### skills management

Skills Management provides the ability to add a new skill rating to a resource in the Resource Manager. The resource can update and maintain their skill rating, attach a numeric value to each skill level, and change the actual name of each skill level.

### source

A source is the originator of the note. For example, if the notes are entered from a service request application, then the source of the note is Service Request. Sources are pre-defined.

### source object

The source object is the originator of the task, note, or appointment; for example, sales, service, or contract.

### Spreadtable

A spreadtable is the user interface component that contains row, columns, and column headers set in a grid that can be embedded into an Oracle form.

### SQL (structured query language)

SQL is an internationally standard language used to access data in a relational database. The acronym is pronounced "sequel."

### SQL*Plus

SQL*Plus is an Oracle tool used to submit SQL statements to an Oracle database server for execution. It has its own command language.

### SQL script

A SQL script is a file containing SQL statements that you run with a tool such as SQL*Plus to query or update Oracle data.

### static mode

Static qualifiers are used to transfer the qualifier's values to every new territory no matter if it is a transaction or a resource qualifier after territory mass creation in Territory Management. Therefore, you can treat the values of the static qualifiers as the required values for every new territory.

### Status

Statuses are assigned to various marketing objects to let users and the system know the state of the object. Changes in status may be affected by the user or may be affected by the system, particularly those status changes requiring approval.

### summary window

Summary windows contain lists of things such as all open fulfillment requests, all available campaigns, or all output devices on a server.

### supplier contact

A supplier contact is the contact information for a person or agency that sells raw material or goods in the Resource Manager. Supplier resources can be imported as resources from the purchasing (PO) application.

### horizontal navigation link

Some tabs have further divisions called horizontal navigation links. Horizontal navigation links, if any, are displayed horizontally underneath the tabs.

### Summary Page

Summary pages, which are a list of marketing objects, appear under many tabs and horizontal navigation links. To view a marketing object's details, click the object's name.

### system administrator

The system administrator is the person who manages administrative tasks in Oracle Applications, such as registering new users and defining system printers, using the system administrator responsibility.

### Tab

Main divisions within the user interface of Oracle Partners.

### task

A task is a discrete unit of work that is assigned to one or more individuals. Tasks are managed by the Task Manager. Tasks are often scheduled events and have defined expirations.

### task assignee

An assignee is the person that is assigned to a task, which can include the owner. An assignee can accept, refuse, or reassign the task.

### task category

A task category as a way of organizing tasks. For example, the task can be a phone call and the category could be call back customer.

### task creator

The creator is the originator of the task and defaults to the owner. However, the owner can be modified.

### task template

A task template is a skeleton or surrogate task.

### task group templates

A task group template is a grouping of different task templates defined during setup.

### Task Manager

Task Manager is a tool used to manage tasks throughout other applications. Task Manager provides a mechanism for tasks to be created, assigned, managed, sorted, and prioritized to provide timely response to customer issues.

### task owner

An owner is the person (resource) that creates and is responsible for the task.

### task type

A task type defines the nature of the task such as a callback or a meeting.

### TCA or Trading Community Architecture

Oracle's single customer database architecture for all types of customers.

### TCP/IP (transmission control protocol / internet protocol)

A widely used industry standard networking protocol used for communication among computers.

### template

A template is an e-mail package containing electronic brochures, newsletters, or other customer-oriented information that an agent sends to customers in response to a request for information in Fulfillment. For example, an agent may use a specific template that contains a thank you letter and a brochure of the company.

### template handler

Template handlers refers to how the data flow built by other application teams occur among registration and how they are associated with enrollments and user types in User Management.

### territory

A territory is an organizational domain with boundaries defined by attributes of customers, products, services, and resources in Territory Management.

### territory administrator

This person administers the specific and periodic duties of Territory Management.

### territory assignment engine (TAE)

After territories are defined, each module can call a standard API to get a set of qualifying employees for a transaction. The API in turn calls the TAE to figure out the qualified Territories that are returned to the API, which then figures out the qualifying resources.

### Territory Manager (TM)

Territory Manager is a tool that helps manage territories.

### territory templates

A territory template is used to create many similar territories simultaneously. They can be based upon territory types in Territory Management.

### territory type

Territory Types are used to group transaction qualifiers when creating territories. In usage, territory types are based on the specific business need in Territory Management. Consequently, territory types can be defined to organize the business. Types are also able to be based on usage, such as, Marketing, Sales, and Service. A territory type can be based also upon customer and product. Another example can include customer type and location.

### Thin Client Framework (TCF)

The Thin Client Framework server is a middle tier process that enables certain Java components of the Oracle Applications user interface to communicate with the middle tier and database tier.

### tier

A set of machines that perform similar tasks. Client/server is a two-tier architecture, with machines on the client tier connecting to machines on the server tier. Internet Computing Architecture consists of three tiers. In Release 11i, machines on the desktop client tier communicate with machines on the application tier, which in turn, communicate with each other and with machines on the database tier.

### top-level territory

A top-level territory is a territory that has the "Catch All" as a parent in Territory Management.

### transaction qualifiers

Transaction Qualifiers are the criteria used to determine the winning territory in Territory Management.

### unassisted assignment option

The unassisted assignment option is used to manually assign a resource to a document or task of your choice without taking predefined criteria into account in the Assignment Manager.

### universal primary user approver

Create a universal primary user approver if you want to have multiple primary users in User Management.

### user

A user is any person who needs access to any application, including various types of customers, partners, suppliers, and employees.

### user ID

The User ID is a combination of a username and its password.

## User Management

User Management is a tool used to registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements set-forth by the organization where the process is deployed.

## username

A name that grants access to a secure environment or program, such as an Oracle database or Oracle applications. A username is customarily associated with a collection of privileges and data available to a particular user (responsibilities in Oracle Applications). Every username is associated with a password.

## user profile

User profiles, which are associated with responsibilities, are a set of user interfaces that give users access to their personal data and preferences.

## user type

A user type is a category of users that caters to the specific needs of an application's business requirements in User Management. User types allow flexible and extensible ways for defining, categorizing and implementing behavior of users. A user type is associated to only one template, one responsibility, zero or one approval and zero or more roles.

## vendor

A business entity that is engaged in the activity of selling products and/or providing services to the marketplace.

## Web availability

Web availability is defined as a resource who has the immediate ability to attend to a service request that is assigned online in the Resource Manager.

## window to promise assignment option

The Window to Promise Assignment option is used to assign a resource to a specific time slot to fulfill a task in the Assignment Manager.

## work

Work is broadly defined as a collection of items presented to an agent through the CRM E-Business application to be processed. Work items can be either a media item or a task.

## workflow

Oracle Workflow automates and continuously improves business processes, routing information of any type according to business rules you can change. Oracle Workflow manages business processes according to rules that you define. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by:

- a PL/SQL stored procedure or an external function
- a notification to a user or role that they may request a response
- a business event
- a subflow that itself is made up of many activities.

## workflow attributes

Workflow attributes control the behavior of the workflow.

## workflow monitor

The workflow monitor is a Java based tool used for administering and viewing workflow process.

# Index