Oracle® Partners

User Guide

Release 11*i*

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Oracle Partners User Guide, Release 11*i*

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Oracle Partners User Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Partners User 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 book has been divided into four parts. Part I provides an introduction and overview of Oracle Partners. Part II provides information on how to get started and understand Oracle Partners. Part III describes functionality pertaining only to vendor users and Part IV describes functionality pertaining only to partner users.

A brief description of what each chapter provides, is given below.

- Chapter 1 provides the key features and process flows of Oracle Partners.

- Chapter 2 provides a brief overview about the profile and preferences have not yet been set.
- Chapter 3 provides an overview of the vendor home page.
- Chapter 4 provides information on creating a new program, program characteristics, program privileges, and how vendors can create a new program within a parent program.
- Chapter 5 provides information on creating a new partner, a contact, and partner profiles.
- Chapter 6 provides an overview of how vendors can match, assign and route an opportunity to a partner.
- Chapter 7 provides information on how a partner can enroll into a program, can be upgraded, downgraded or terminated from a program.
- Chapter 8 provides an overview of the partner Home Page.
- Chapter 9 provides an overview of the partner enrollment and registration flow.
- Chapter 10 provides information on the My Company tab that enables a partner to view information related to their organization.
- Chapter 11 provides information on how a partner accepts/declines and updates an offered opportunity.
- Chapter 12 provides information on the Support tab that enables entry into Oracle iSupport.
- Chapter 13 provides an overview of a partner's access privileges.

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.

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 flex fields 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 flex fields 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 Orcale*MetaLink*, register at (`http://metalink.oracle.com`).

Alerts: You should check Oracl*eMetaLink* 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.

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Thank you for using Oracle Partners and this user guide.

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Oracle Applications Documentation Manager
Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Or, send electronic mail to **appsdoc_us@oracle.com**.

Part I

Introduction and Overview

This part contains the following chapter:

- Chapter 1, "Introduction and Overview to Oracle Partners"

1 Introduction and Overview to Oracle Partners

This chapter discusses the key features and process flows of Oracle Partners. Sections in this chapter include:

1.1 Overview

Oracle Partner Relationship Management assists an organization in maintaining, tracking, managing, and communicating with its partners. Oracle E-Business suite provides facilities for managing leads, tracking and sharing opportunities with partners, forecasting sales, managing partner and customer information, sending outbound information, and calendaring activities, tasks and notes.

Oracle's solution to Partner Relationship Management is comprised 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

Oracle Partners facilitates these actions and tasks by providing a number of different responsibilities which are available to users of Oracle Partners. Oracle Partners is used not only by owning organizations, the Vendor, but by Partners and Value Added Distributors (VAD) as well. Oracle Partners provides a central store of information available to all of the parties involved in a partners transaction.

1.2 Understanding Responsibilities

In Oracle Partners, users can access only the functionality needed to perform the tasks associated with their responsibility.

Various levels of responsibility, differentiates the type of user and their access to specific functionality within the application. The different responsibilities are listed as follows:

- Vendor User
- Vendor Administrator
- Partner User
- Partner Administrator
- VAD User
- VAD Administrator

1.2.1 Vendor User

Vendor Users can have multiple roles such as Channel Manager, Channel Marketing Manager and Assignment Manager. Assignment Managers are responsible for assigning indirect opportunities to appropriate partners.

1.2.2 Vendor Administrator

The Vendor Administrator has access to Oracle Partners administrative setups to define custom profile attributes, attribute values, time-outs, status notification, and partner user accounts.

1.2.3 Partner User

Partner access to Oracle Partners enables partners to perform the following tasks:

- View/Maintain their own profiles
- Create and manage their customers
- Create opportunities
- View offered, active, inactive, won, and lost opportunities
- Accept/decline an offered opportunity
- Modify, update, and progress the opportunity after it is accepted
- View, modify and create service requests

1.2.4 Partner Administrator

The Partner Administrator creates and manages user logins and passwords.

1.2.5 VAD User

The VAD user performs the same types of task as the Partner User, with the exception of the following:

- The VAD sees a partner tab link, that is not available to the partner. The VAD can create and manage their own partners.
- The VAD can choose to work on an opportunity themselves, or pass it to one of the smaller partners that they manage, without going through the vendor.

1.2.6 VAD Administrator

The VAD Administrator has similar duties as of the Partner Administrator, with additional ability to create and/or manage users logins and passwords for all of the partners that they manage.

Oracle Partners facilitates VADs to create and/or manage their partners in vendor's system. Partners of a VAD are indirectly managed partners of the Vendor.

Oracle Partners provides a seeded responsibility with which VAD administrators can create and/or manage their partners and partner contacts.

1.3 Navigation and Tab Descriptions

Vendors have various types of agreements and strategic alliances with their partners. In light of these agreements, partner users will have differences in what they can create, view, and update.

Users can log in to Oracle Partners as a vendor, partner or VAD.

Vendors have access to tabs that enables them to perform their tasks. Similarly, partners have access to certain tabs. The description for tabs for the vendor, partner and VAD are listed below.

- Vendor User
- Partner User
- VAD User

1.3.1 Vendor User

The partner functionality for vendors is organized by the following tabs:

- Home
- Opportunity
- Customer
- Partner *(Vendor Only)*
- Administration *(Administrator Responsibilities Only)*
- Program

1.3.1.1 Home

Oracle Partners provides more home page tools. Users can choose from opportunity, lead and forecast bins that provide key metrics about win/loss, pipeline status, and forecast progression with drill down capabilities to the next level of metrics.

1.3.1.2 Opportunity

Oracle Partners enables users to create, view, and update sales opportunities. Users can enter various opportunity details such as customer, product interest, total budget, sales team, notes, tasks, attachments, and so on. Vendor users can assign opportunities to appropriate partners by using the partner matching engine and track status of an opportunity from beginning to end.

1.3.1.3 Customer

The Customer tab lists a summary of customer details. When the customer's organization name is selected, the main summary page appears with links to relationships, opportunities, notes, sales team, tasks, interactions, attachments and the 360 view. Only people on the customer sales team have access to this information.

The main page in organization detail displays high level information including addresses, customer category, annual revenue, total employees, year established, web site, lifetime value, sic code type and code, duns number, business line, tax ID, fiscal year end, and last order date.

1.3.1.4 Partner

Partner tab is available to vendors only and they can create and manage their partners. Vendors can maintain and track profiles of partners. Partner profile information is used during the opportunity matching process in order to route opportunities to appropriate partners. Oracle Partners also enables vendors to create and maintain contacts for partner organizations.

1.3.1.5 Administration

Oracle Partners enables vendors to define partner profile attributes under the Administration tab. Vendors can also create custom defined profiles. This tab enables the vendor administrator to set up status notification, time-outs, user registration, attributes, attribute values, the channel marketing manager and channel types setups.

1.3.1.6 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, and invite specific partners.

1.3.2 Partner User

The functionality for partners and VADs is organized by the following tabs.

- Home
- Opportunity
- Customer
- My Company (*Partner and VAD)*
- Support
- Partner (*VAD Only)*

1.3.2.1 Home

The home page is configurable based on a user's need. Users have the ability to have any of the following on the home page.

- Bins
- Charts

1.3.2.1.1 Bins Bins are mini reports that are displayed in a tabular format. The home page has the ability to display bins created by other CRM applications. The data displayed is based on the data security associated with the object that is users can view only data that they have access to. The bins are also controlled through responsibility. The Oracle Partners administrator can grant access to bins based on responsibility. For example, compensation bins might not be relevant to partner users. So, the Oracle Partners administrator can remove access to the compensation bin from the partner user responsibility.

All bins have their own parameter page which users can configure to show the relevant information in the bins. Each bin has an edit button that takes users to a parameter page. At the same time, the bins can also be configured using the home page preferences. But, the number and order of the bins is controlled through the home page preferences.

1.3.2.1.2 Charts Users will have the ability to display charts on the home page. They can select a chart and chart type in the home page preferences. The following is the list of charts that are available:

- Opportunity Chart by Close Date
- Opportunity Chart by Status
- Opportunity Chart by Win Probability

1.3.2.2 Opportunity

Partner users can view opportunities offered to them by vendor organizations. They have a limited view of the opportunity till they accept it. Upon acceptance of an opportunity, partner users get full access to opportunity details. Partner users can create their own opportunities as well.

1.3.2.3 Customer

The customer tab lists a summary of customer details. When the customer's organization name is selected, the main summary page appears with links to relationships, opportunities, notes, sales team, tasks, interactions, attachments and the 360 view. Only people on the customer sales team have access to this information.

- The main page in organization detail, displays high level information, including addresses, customer category, annual revenue, total employees, year established, web site, lifetime value, sic code type and code, duns number, business line, tax ID, fiscal year end and last order date.

1.3.2.4 My Company

Partners can view information about their company. The company profile includes information about the fiscal year, annual revenue, last order date, tax ID, web site, year established, and number of employees.

Personal profiles of partner contacts under My Company shows addresses, phone numbers, and other details. This information is read only.

1.3.2.5 Support

Partner and vendor users can access the solutions catalog to search for a solution. They can also create new service requests and view/update existing ones.

1.3.2.6 Partner

Partner tab is available to VAD users only. Using this tab, VADs can create and manage their own partners. The VAD can choose to work on an opportunity themselves, or pass it to one of the smaller partners that they manage, without going through the vendor.

1.3.3 VAD User

When users log in as a VAD, they have access to the following tabs:

- Home
- Opportunity
- Customer
- My Company
- Partner

1.4 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 can log in to the application to conduct transactions with the company. Partner Administrator can manage partner profile information and 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.

1.5 Oracle Partners Integrations

Oracle Partners integrates with the following products:

- Contracts
- Order Management
- Inventory
- iPayment
- Trade Management
- Pricing
- Oracle Content Manager
- Oracle Approval Management
- Territories

- Marketing; Lead Management
- Sales Online; Opportunity Management and Forecasting
- iSupport

1.6 What's New in this Release

This release includes the following new features:

- Partner Profiling Enhancements
- Partner Programs and Enrollment
- Partner facing UI Enhancements

Note: 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 Oracle*MetaLink* for relevant product patches and documentation.

1.6.1 Partner Profiling Enhancements

Oracle Partners extends partner profiling system to support:

- Partner Contact Profiling
- Additional Profile Attribute Types
- Profile Attribute Versioning and Validation
- UI Enhancements to Partner Manager view of Partner Profile

Partner Contact Profiling

Employees of partner organizations are extensions of marketing, sales, and support staff. It is necessary to make sure that partner contacts are proficient on product line(s) to guarantee customer satisfaction. Proficiency and certifications of partner contacts play an important role in assignment and routing of sales and support transactions to your partners. Oracle Partners provides profiling capabilities at the partner contact level.

Additional Profile Attribute Types

Oracle Partners 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 a variety of new display styles such as check box, radio button, and 'Multi/single-select list-box' for rendering LOV attributes.

Profile Attribute Versioning and Validation

Profile versioning and time stamping enables users to view the attribute values for a partner at a snapshot in time. Versioning and date stamping of the partner profile also enables vendors to analyze progress of a partner during the recruitment and ramp-up phase of the partner lifecycle. Vendors might 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. Oracle Partners enables 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.

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

1.6.2 Partner Programs and Enrollment

Oracle Partners provides a flexible partner program framework to programmatically manage partners. It also offers configurable partner registration and enrollment support.

Oracle Partners enables vendors to create robust partner programs to roll out to the 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, vendors can create marketing campaigns to target partners for specific programs. Partner programs have the utility to simplify the management of the relationship with partners. Vendors can create programs to automatically expedite the benefits to partners. Programs drive all contractual and implied entitlements.

1.6.2.1 Key Features

The key features of this release are described below.

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.

Program Fees and Payment Rules

The partner manager 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 payment. The following payment types are supported in the product:

- Credit Card
- Check
- Cash
- Purchase Order

Program Contractual Terms and Conditions

The partner manager can associate the appropriate Partnership Contract Template (defined in Oracle Contracts) to a Partner Program by geography. During the enrollment process, an appropriate contract is presented to the partner (based on partner's geographical location) to sign. The 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.

Program Hierarchies and Upgrade Rules

Programs can be grouped and organized using Program Hierarchies. Users can define upgrade rules among programs. For example, partners can move from

'Reseller Program - Silver' to 'Reseller Program - Gold' to 'Reseller Program - Platinum'.

Program Enrollment Questionnaire

Users can define a questionnaire while creating a program. The questionnaire can be configured to point to appropriate profile attributes. During the enrollment process, the system prompts partners with the enrollment questionnaire and populates partner responses into their profile.

Centralized Approval Rules for Program Enrollment

Users can define approval rules for the enrollment request using Oracle Approvals Management (AME). Based on the approval rule definition, the 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 necessary during the implementation.

Partner Enrollment System

New and existing partners can enroll into a program from your website. 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 the partner who can sign online or print and mail/fax it. Partnership Contracts are maintained in Oracle Contracts.
- Program Payment Handling - Based on the program definition, the 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 a geographic location. The enrollment system is integrated with Order Management and iPayment server (for credit card authorization) to process the payment.

Program Renewals and Upgrades

The partner manager 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 the partner to validate their current profile, sign renewal contract, and process applicable payment during the program renewal process. The system also prompts partners to upgrade their membership based on Program Upgrade rules.

Program Invitations

The partner manager can invite certain partners to join new programs or upgrade their membership. As an incentive, the 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.

1.6.3 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

- New Programs
- Available Program Upgrades
- Upcoming Program Renewal
- Program Notifications

Ability for partners to view

- My Enrolled Programs
- Incomplete Enrollment
- Their company profile
- Outstanding Partnership Contracts

Part II

User Procedures

This part contains the following chapter:

- Chapter 2, "Getting Started with Oracle Partners"

2

Getting Started with Oracle Partners

Oracle Partners is a tool to manage, develop, and facilitate partners of a vendor organization. There are a number of responsibilities and profiles associated with Oracle Partners that are assigned to various functional roles in the partner relationship. This chapter gives an overview of those responsibilities.

The application can appear differently to each of the responsibilities as each one has a set of rules and conditions that determine what facilities are available to it. This chapter also gives an overview of some of the common components of Oracle Partners and the business processes that it models.

The first time you log in to Oracle Partners, your profile and preferences have not yet been set. You can also decide which items to display on each summary page in Oracle Partners. The following sections are covered in this chapter:

- Section 2.1, "Personalization of the Oracle Partners Environment"
- Section 2.2, "Setting Oracle Partners Preferences"
- Section 2.3, "Advanced Search"
- Section 2.4, "Workflow and E-mail Alerts"

2.1 Personalization of the Oracle Partners Environment

This section of the Profile page enables you to determine which responsibility will be used upon login as well as allow you to switch responsibility to another available responsibility should you need the abilities available.

You can change the attributes of the screen display to modify the language, currency, and date formats, as well as the number of table rows to display.

2.2 Setting Oracle Partners Preferences

This section of the Profile page enables you to set your preferences for the various tabs within Oracle Partners. Preferences that can be set are:

- Setting General Profiles
- Setting Home Page Profiles
- Setting Opportunity Profiles
- Setting Customer Profiles
- Setting Partner Profiles
- Setting Partner Matching Options

2.2.1 Setting General Profiles

Use the General Preferences page to set the defaults for fields that are applicable to several tabs.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Partner User

Partner Admin

VAD User

VAD Administrator

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **General** side navigation link.
2. Select a defult country from the Default Country drop-down list.

3. Select a default role from the Default Role drop-down list.

   Default Role: This is the role assigned through the Resource Manager. It also indicates if your role is a sales group member, manager or administrator. You can have one or many roles. This partially controls the opportunities you can view and the forecast data submitted. When you have multiple roles, it is important to recognize which is your current role.

4. Select a default start page from the Default Start Page drop-down list.

   This page will appear when you log in to the application, if different from the Home page.

5. Enter a value in the Track Records for 'N' Days field.

   This controls the number of days to display the New and Modified icons next to any record that has been changed by another user or is new on a summary window. Enter the number of days for which you want to track records. The value must not exceed 14 days. Setting the value to zero will disable the feature.

6. Select the **Display Creation and Modified Tracking** check box to display a footnote on the bottom of each updateable page that shows the creation date, last change date, and user ID.

7. Select the **Enable Record Counting** check box to show the number of records in a table, for example, 1-31 of 100.

   Note: If you disable record counting, the "Next" button will be active even if there are no more records to view. However, if you enable record counting the "Next" button will not display if there are no additional records.

8. Click **Update** to save your changes.

2.2.2 Setting Home Page Profiles

Until you set your preferences, you will see an introductory message about setting preferences on the home page. Use this procedure to set your home page profiles.

Your home page preferences are categorized into the following sections: Bin Preferences, Chart Preferences, and Report Preferences.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Partner User

Partner Admin

VAD User

VAD Administrator

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **Home Page** side navigation link.
2. Click **Add New Rows** to add items to bins, charts, and reports.

   Narrow Bin Preferences: A small table of information for specific data types. Bins that are available are:

   - Top Performers
   - Opportunity Status
   - Open Opportunities
   - My Forecasts
   - My Favorite Reports
   - New Leads
   - Win Loss Ratio
   - Corporate Open Opportunities
   - Corporate Won Opportunities
   - System Counts
   - Program Renewals
   - Incomplete Enrollment
   - My Offered Opportunities
   - New Programs

- Available Program Upgrades
- Upcoming Program Renewal
- Program Notifications
- My Enrolled Programs
- Outstanding Partnership Contracts

To decide the order that the bins should display on your page, choose a number for each bin that you want to use on your home page. Additionally, from the drop-down lists, you can set the number of rows for each bin that you want to see and the frequency.

Note: Since an opportunity can contain more than one product category, you can see a difference in the number of opportunities as compared to the number of product categories when you are viewing an opportunity bin.

Chart Preferences: You can select and configure the Charts of your choice from a drop-down list to display on your personal home page. Charts that are available are:

- Opportunity Chart by Close Date
- Opportunity Chart by Status
- Opportunity Chart by Win Probability

Report Preferences: To display reports on your home page, choose from the Report Name drop-down list. Reports that are available are:

- Programs Overview Report
- Enrollments Overview Report

3. Enter a value in the Number of News Headlines field.
4. Click **Update** to save your changes.

2.2.3 Setting Opportunity Profiles

Use the following procedure to set opportunity profiles.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Partner User

Partner Admin

VAD User

VAD Administrator

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **Opportunity** side navigation link.
2. Select a value from the Default Sales Stage drop-down list.

   The stages are the ones that are in a sales cycle. These can be linked to a specific methodology.
3. Select a value from the Default Win Probability drop-down list.

   The probability is the chance of winning the opportunity expressed as a percentage. This is used to calculate the standard forecast amount, also known as the weighted forecast.
4. Select a value from the Default Status drop-down list.

   This is the current status of an opportunity, showing if the deal is won, lost, open, or dead.
5. Enter a value in the Default Close Date to ’N’ Days Ahead field.

   The default number of days in the future you plan to close opportunities. Enter the default number of days to plan your default close dates.
6. Select a value from the Default Channel To drop-down list.

   This is the method of receiving an opportunity, usually direct or indirect.
7. Select a value from the Default Sales Methodology drop-down list.

   A predefined set of guidelines and tasks to assist sales people through the sales cycle. The methodology selected will automatically create a set of tasks assigned to the sales person creating/modifying the opportunity.

8. Select a value from the Default Response Codes drop-down list.

   Describes how the opportunity is received. Examples include through web, e-mail, phone.

9. Select the Default Sales Methodology Progression check box if you want the sales methodology progression to be displayed as a bubble train on the opportunity detail window.

10. Enter a value in the Display 'N' matched partners field.

11. In the Opportunity Routing Notifications region, select Yes or No from the drop-down list, to receive e-mail for the following routing statuses:

    Active Notification Flag

    Unassigned Notification Flag

    Matched Notification Flag

    Recycled Notification Flag

    Abandoned Notification Flag

    Offered Notification Flag

    Withdrawn Notification Flag

12. Personalized Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page. Remove any non-seeded saved search by clicking the Remove check box.

13. Personalized Reports: Remove any saved reports by clicking the Remove check box. Note that Seeded searches cannot be removed.

14. Click **Update** to save your changes.

2.2.4 Setting Customer Profiles

From the Customer Preferences page, you can set your default values for the Organization, Person, and Contacts horizontal navigation links.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Partner User

Partner Admin

VAD User

VAD Administrator

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **Customer** side navigation link.
2. Select a value from the Default Organization Phone Type drop-down list.

   This is the kind of phone for the organization, such as mobile, voice mail or general.
3. Select a value from the Default Person Phone Type drop-down list.

   This is the kind of phone for the person, such as mobile, voice mail or general.
4. Select a value from the Default Customer Category drop-down list.

   This is a way of grouping customers into standard categories. This is usually an company defined list of categories.
5. Select a value from the Default Address Type drop-down list.

   This is the default address type that will be used when creating a new customer. Examples: Marketing, Billing, and Shipping.
6. Select a value from the Default Person to Organization Relationship drop-down list.

   This is the default person to organization relationship that will be used when creating a new relationship. The default relationship types include Contact of and Employee of.
7. Select a value from the Default Organization to Organization Relationship drop-down list.

   Default relationship types include Competitor of and Partner of.

8. Select a value from the Default Person to Person Relationship drop-down list.

   This is the default person relationship that will be used when creating a new relationship. These relationship types include Manager of, Spouse of, and Dependant of.

9. Enter a number in the Display Interactions for Last "number" of Days field.

10. Select a value from the Default Account Site Use drop-down list.

    This is the default account site that will be used when creating a new customer. Values include Bill to, Ship to and Sold to.

11. Select a value from the Default Customer Language drop-down list.

    This is the default language of the customer.

12. Select a value from the Default Contact Status drop-down list.

13. Select a value from the Default Related To Type drop-down list.

14. Select a value from the Default Address Status drop-down list.

15. Select a value from the Default Buy/Sell Indicator drop-down list.

16. Select a value from the Default Issue Scheme drop-down list.

17. Select a value from the Default Public Status drop-down list.

18. Select a value from the Default Primary Address Status drop-down list.

19. Select a value from the Default Use Filters to Create List drop-down list.

20. Personalized Organizational Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

21. Personalized Contact Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

22. Personalized Person Searches: The list of saved searches created, including the pre-seeded searches. You can remove/delete your personalized searches and select which search to be used as your default summary page. These searches are included in the Search dropdown list on the summary page.

    The seeded searches, "My Organizations", "My People", and "My Person Relationships", cannot be removed because they are system wide defaults.

23. Personalized Reports: Remove any saved reports by clicking the Remove check box. Note that Seeded searches cannot be removed.
24. Click **Update** to save your changes.

2.2.5 Setting Partner Profiles

The Partner Profiles govern which organization is the default vendor and which partner and contact searches will be used for the summary page.

Prerequisites

None

Responsibility

Vendor Admin

Vendor User

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **Partner** side navigation link.
2. Select a value from the Default Vendor Organization drop-down list.
3. Personalized Partner Searches: Select a search to use as the default summary page search. Any of the three seeded searches: All Partners, Exchange Partners or Sales Partners can be selected as well as any saved searches.
4. Personalized Contact Searches: Select a search to use as the default summary page search. Any of the three seeded searches (All Partners, Exchange Partners or Sales Partners can be selected as well as any saved searches.
5. Click **Update** to save your changes.

2.2.6 Setting Partner Matching Options

The Partner Matching Options are used to control which Automatic Partner Matching Rule to use and whether or not to use the Rule Engine Trace. If users want to select a specific rule that will be applied each time they ask for automatic matching, they need to select it here, otherwise, the rule that will be applied is based on the opportunity details.

Prerequisites

None

Responsibility

Vendor Admin

Navigation

Oracle Partners > Profile > Oracle Partners

Steps

1. Click the **Partner Matching Options** side navigation link.
2. Select a rule to use from the Automatic Partner Matching drop-down list.
3. Select Yes or No for Rule Engine Trace On drop-down list.
4. Enter a rank in thee Rank field.
5. Select an attribute from the Attribute drop-down list.
6. Click **Update** to save your changes.

2.3 Advanced Search

The Advanced Search is a parameter driven detailed search related to the tab that is active. In this search, you can save the search criteria and optionally use it as the default summary window for the selected tab. In addition to a wide variety of parameters, you can select the columns that you want to display in the search results and select from three levels of sort criteria.

Example

You are trying to locate a person or contact in Oracle Partners and only have the person's telephone number and no additional information. Whereas, the quick find button is limited to person, organization, e-mail, and so on. The advanced search feature allows you to customize your search.

Oracle Partners provides you a way to use Advanced Search to search by phone number.

You can search by phone number for person using the following navigation:

1. Customer Tab > Person > Advanced Search

2. Enter the person's phone number.
3. Click **Search**.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Partner User

Partner Admin

VAD User

VAD Administrator

Navigation

Oracle Partners > Partner > Partners page

Oracle Partners > Program > Partner Programs page etc. Advanced Searches can be set up on any of the tabs where they are used by clicking the Advanced Search link, which takes users to the search page where it is setup.

Steps

1. Click **Advanced Search** or **Personalize**.

   Advanced Searches are available with the following tabs:

   - Customer
   - Partner
   - Programs
   - Lead
   - Opportunity

2. Select search filters and display options.
3. If you want to save the search enter a Search Name.
4. Click **Search**. If you want to apply the search and save the search as the same time, choose the **Save and Apply Search** button.

When saving a search, the name must be different than the seeded searches that are provided with the product. Once a search is saved, the name will become an option for the object's summary window.

2.4 Workflow and E-mail Alerts

Through Oracle Workflow, Oracle Partners increases vendor and partner efficiency by automatically updating routing statuses and automatically routing opportunities to and from various parties. Features and notifications of Oracle Workflow include:

- Automatic alerts from a channel manager to notify a partner of an assigned opportunity.
- Automatic routing status update from matched to "offered", once the channel manager has approved the routing to the partner.
- Automatic routing of an opportunity (with an e-mail notification) to the assigned partner upon approval of the CM.
- Automatic routing status update to active upon partner acceptance.
- Automatic routing status update to recycled partner declines the offered opportunity.

Part III

Vendor User

This part contains the following chapters:

3

Home Page

For information on the home page, see *Oracle Sales Online User Guide*.

4 Program

The partner program module enables vendors to create organized programs for roll out to existing and new partners.

This chapter consists of the following sections:

4.1 Overview

The partner program functionality enables vendors to create programs for a specific partner community. Programs can be created for selected groups of partner types, for example, Reseller, Value Added Resellers (VAR), Distributors, and so on. Vendors can customize programs to excite the recruitment of new partners and to motivate the selling of existing ones. Vendors can also design programs that provide valuable information, incentives, promotions, and other benefits to a wide partner community.

The vendor program owner creates a single program and program characteristics such as qualifications, benefits, payments, and terms and conditions. Programs must be approved by valid individual(s) within the vendor organization post creation and prior to activation for open enrollment. The program is then submitted for approval. The vendor approver receives notification requesting for program approval. The approvers receives a notice in either their inbox, or need to go to the workflow application requesting that an approval is required. The vendor then approves the program and the program owner receives notification of approval and activates the program for enrollment.

Partner types drive the qualification criterion, and enrollment questions for a program. Depending on the partner type(s) selected for a program, particular partner attributes will be linked to the qualification and enrollment processes.

4.2 Process Flow

The vendor should be able to define programs in which partners can enroll. Once vendor defines the program, it is submitted for approval. The approver should be able to approve the program from workflow notification. Also, the vendor user should be able to edit the programs as required.

Note: Program approval process relies on the "Setup Type" for a Partner Program in the administration module of the application.

- Approval rules are defined with a Setup Type. Setup Types are assigned to an object (for example, Partner Program).
- Program Statuses are New, Planned, Pending Approval, Available, Active, Cancel
- Program creation approval flow logic utilizes the functionality associated to the approval rules for Oracle Marketing (OMO) budgets and activities.
- Program approval rights is defined in the responsibilities of vendor users

The process flow to create a partner program is as follows:

1. Vendor program owner creates a partner program
2. Vendor program owner defines program characteristics
3. Vendor program owner submits for approval

4.3 Create a New Partner Program

Use this procedure to create a new partner program.

Prerequisites

None

Responsibility

Vendor User

Vendor Admin

Navigation

Oracle Partners > Program > Partner Programs page

Steps

1. Click **Create New Program**.

The Create Program page appears.

2. Select a program type using the Program Type drop-down list.

   Program type refers to the type of program that is set up by the administrator with the approvers hierarchy already set up. This helps the program to be routed for approvals auomatically.

3. Enter a name in the Program Name field.
4. Select a level using the Level drop-down list.
5. Select a start date using the Start Date LOV.
6. Select an end date using the End Date LOV.

   The start and end dates are defaulted to the parent programs dates respectively. But users can still choose a start and end date in between the parents’ start and end date.

7. Select an owner using the Owner LOV.

   Owner refers to the owner of the program which is defaulted to the logged in user. The LOV retrieves individuals with the role of owning a partner program.

8. Enter a description in the Description field.
9. Click **Finish** to save your changes.
10. Click **Continue** to edit program details.
11. Click **Cancel** if you do not want to save your changes.

4.4 Program Characteristics

After creating a program, vendors must define program characteristics such as program qualifications, benefits, geography, terms and conditions, legal terms, payment terms, collateral, and membership duration.

Vendors can organize and offer specific benefits to partners. Benefits such as sales opportunities, product information, marketing collateral, services, and training can be grouped within a program.Vendors can recruit and maintain selling partners with specific incentive packages. Increasing and maintaining a strong partner community will help a vendor to increase overall market share and revenues.

4.4.1 Requirements

Vendors must define a qualification Pass/Fail score for the partner enrollment application. Qualification rules can be defined for each program that is created. These rules evaluate the partner's enrollment questionnaire. Vendors can then view whether the partner enrolling has either passed or failed the base criterion that is set for the program.

4.4.2 Benefits

Vendors can define benefits of the program created. A number of benefits are predefined with the Oracle Partners for partner programs. Vendors can create and add additional benefits for programs using lookups.

Different benefits can be associated to a program under the Program > Benefits side navigation link. Some of the benefits are seeded. Users/implementer can modify the seeded benefits and/or add new benefits using Lookups. Users need to log in to the Forms application with an Application Developer responsibility, and access the Lookups window through Lookups > Application Object Library. Users need to query for the 'PV_PROGRAM_BENEFITS' lookup type, add/modify the lookups and save the changes.

For information on how to setup benefits, see *Oracle Partners Implementation Guide*.

4.4.3 Geography

Vendors must define valid geographic areas for a program. A program is only allowed for participants in the declared areas. Participants outside of geographies declared will not be allowed to participate in the program.

4.4.4 Legal Terms

Legal terms can be defined for a specified geographic area. Vendors can define a contract template or terms and conditions for a program using Oracle Contracts and associate these contracts with program using Oracle Partners.

Oracle Partners uses the Contracts module to store and manage partner contracts. 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.

For information on how to create a new contract template, see *Oracle Partners Implementation Guide*.

4.4.5 Payment Terms

Vendors must define membership costs, acceptable payment method, membership duration, and renewal alerts. Program owners define the membership fee for program. At the time of enrollment, partners will be asked to submit fees equal to the amount defined. The payment types accepted during enrollment also reflects the payment types selected for the program.

Payments are validated during partner enrollment. credit card, purchase order and other payment types are validated before a partner enrollment is accepted.

4.4.6 Membership Duration

Vendors can define a membership duration. Membership duration begins at the time a partner enrollment is approved, and till the duration as defined by the program. Vendors should also be able to define renewal alerts for partners and individuals. Alerts will be sent out to partners informing them if their membership is going to expire. Partners can renew if desired and process payment for renewal.

4.4.7 Enrollment Form

Partners can initiate enrollment through self-service within the partner home page. Once initiated, the partner is guided through the process of completing an enrollment form, reviewing enrollment form summary, viewing and signing a contract online, and submitting payment for membership fees. When the enrollment is submitted, a Thank You page is displayed to the partner.

Vendors must create an online enrollment form for partner enrollment. The enrollment form is linked to the enrollment of the current program and associated to its respective partner program. Profile attributes are populated with answers that are submitted by the partner enrolling. Profile attributes with values are pre-populated within the enrollment form. For example, if a partner already has profile attribute values for "Number of Employees" within the system, that question is pre-populated with the existing value during the time of enrollment.

The enrollment form is linked to the overall enrollment flow. The enrollment flow consists of enrollment form, contract review, and payment. Profile attributes attached to the individual questions build the partner profile. Answers submitted by the partner, populate the partner profile attributes with values.

4.4.8 Approval Checklist

The approval checklist provides an approver a list of tasks associated with the program for which he is reviewing the enrollment request.

Vendors can create an online task list to be used during the enrollment request approval process. A task is any process that the approver is needed to complete before approving the enrollment request for a program. Approvers can view the list of "To Do" items before approving or rejecting a potential partner into a program. A setting can be flagged for the approver to review and complete all items on the task list before an enrollment is approved. It is mandatory for approvers to check all the tasks before they are able to approve the enrollment request. This is mandatory only when the check box, Do Not Allow Enrollment Approval Before Completion of Task, is selected.

4.4.9 Pricing and Payments

Vendor can charge fees from partner users for enrolling into a program membership, and also can offer discounts some times to attract a partner. In order to fulfill this requirement, it is necessary to enable programs to be priced.

Program enrollments module enables partner users to enroll in different program memberships. The Advance Pricing (QP) functionality of the E-Business Suite product, has been used to define base price, and offer discounts for the program membership. Since, QP can only offer the pricing functionality for the inventoried items, membership programs have to be created as inventory items in Inventory product (INV).

Vendors can create price configurations based on the currency of a partner enrolling. Vendors can also configure allowable payment methods based on the geographic region. They can create pricing and payment method configurations based on the currency and region. Vendors can search for a pre-defined pricelist and associate them with a specified currency. Vendors can also input start dates, end dates for the price list and add allowable payment types to a region.

When a partner enters the payment section of the enrollment process, Oracle Partners determines the currency and geographic location of the partner. Depending on these two values, the system retrieves the appropriate price and allowable payment methods to the partner.

4.4.9.1 Price List Setup

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 price lists can be created by logging in into the applications and navigating to PriceList Setup window.

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

4.4.10 Program Overview

Vendors can create a summary of the program created, to be published on the partner home page. They can choose to write a description of the program, its benefits, qualifications, membership fees, and duration.

Note: This content is stored in Oracle Content Manager (OCM).

4.4.11 Notifications

Notifications are informative e-mails sent to the partner. Vendors can send a message to the concerned party informing them of the status of their request for enrollment or if documents are needed from them to be sent. Vendors can maintain a list of notifications that are active for a program, and values of various parameters associated with that notification. They can activate a set number of notification alerts for program/membership driven events. Some of the notifications are strictly informative to partners about their enrollment. Other notifications are to remind partners to take particular action about their enrollment. Vendors can choose notifications that should be active.

Notifications contain messages that can request users to take some action and/or provide users with information. Oracle Partners in Partner Program module have different types of notifications attached to a partner program. These notifications are configured at Membership level program, under the Notifications side navigation link. Oracle Partners sends out notifications to partners based on notifications criteria and if it is active.

Partner users can query their notifications online from their Program Notification bin in an HTML browser. Users can also receive notifications as e-mail messages. If their notification preference is set to "Plain text mail", "HTML mail", or Plain text mail with attachments in a users preferences Web page and their workflow administrator sets up the Notification Mailer to run. Some notifications are generated on the fly with the triggering of some event, and some are generated by the execution of some concurrent requests.

Notification alerts are triggered when specified events occur within a partner's enrollment term. Certain alerts can be configurable variables such as "number of days" associated with them. Vendors can specify values to these variables. The alerts are triggered when the values are not met.

All notifications are linked to specific e-mail messages that are configured in the Workflow Framework. When the actual notification events are triggered, Oracle Partners initiates the respective e-mail within Workflow. The partner's e-mail address is provided in the e-mail message. The notification e-mail is configured within the Workflow framework of Oracle Apps. All messages can be created and editable within the Workflow framework. The Workflow framework provides the functionality to create the e-mail message, and send e-mail as well. All e-mails that are sent, are configurable to "CC" a particular person within the vendor organization. For all time triggered notifications, Oracle Partners has daily batch programs to analyze the proper notifications to be executed. The frequency of batch programs is configurable and can be done by an administrator.

The different notifications are:

4.4.11.1 Thank You Notification

When a partner user successfully enrolls into a partner program sponsored by the vendor, a Thank you notification mail is generated by Oracle Partners with the enrollment request details. This notification is generated on the fly, after the successful enrollment of a partner for a vendor program.

4.4.11.2 Welcome Notification

When a partner user requests for an enrollment to a partner program, the approver in the vendor organization, takes action on the enrollment request, either by approving or rejecting it. If the approver approves the enrollment request, the requestor get a welcome notification for the requested partner program.

4.4.11.3 Rejection Notification

When a partner’s request for enrollment into a program is rejected by the approver, the requestor gets a rejection notification.

4.4.11.4 Change Membership Level for a Program

Partners are notified if they have an offer to upgrade/downgrade from one program or membership level to another, for enrollment. Partners are also notified, if they get an invite for some new partner program from the vendor organization. Vendors can select all the partners for a specified program and upgrade/downgrade/terminate or send new invitations within the same program. Sending a notification to a partner during Upgrade/Downgrade/Terminate/New Invites depends upon the 'Do Not Send Message to Partner(s)' check box value. Vendors can choose to select/deselect the check box 'Do Not Send Message to Partner(s)'.

Oracle Partners supports the following types:

- Upgrade membership
- Downgrade membership
- Terminate membership
- New Invites

4.4.11.5 Contract Not Received Notification

Repeat notification every m (days/Weeks/Months) until contract is accepted, that is vendors can set the number of days/weeks/months within which if a contract is not received, the notification message will be triggered and also the repeat frequency and unit that is days, weeks, months.

When partner users successfully enroll for a partner program, they have to submit a signed copy of a contract for that program. If the signed copy is not received within the specified time limit, the enrollment system sends a notification to the partner user. The system repeats the notification until the signed copy of contract is received. This is managed by the execution of a daily scheduled concurrent request program in a batch mode. In these type of notifications, the repetition depends upto the notification rule set for that partner program.

4.4.11.6 Membership Renewal Notification

Repeat notification every m (days/Weeks/Months) until membership is renewed or inactivated, that is vendors can set the number of days/weeks/months within which if a membership is expiring, the notification message will be triggered and also the repeat frequency and unit that is days, weeks, months.

When an enrollment is going to expire in near future, and the membership ID falls in the cycle of sending membership renewal notification, Oracle Partners sends the membership renewal notification to partner users. This notification is also managed by the execution of a daily scheduled concurrent request program in a batch mode.

4.4.12 Upgrade Rules

Vendors can define upgrade rules for partner program or membership levels so that the membership level can be upgraded from a current level to a higher one. A membership program can be upgraded to higher levels to give more benefits to partners enrolled. Users have a facility to define one or more upgrade rules for a membership level at a time.Vendors can create inter relationship rules for a partner to upgrade and downgrade between levels. The definition of such rules determine the program or membership level(s) available for an upgrade when it is initiated by a vendor or a partner. Defining the upgrade rules implicitly defines the downgrade rules as well. Therefore the downgrade relationships are available for downgrading a partner's program or membership level as well.

The upgrade rules are applicable only for membership type programs and determine the membership levels available when a vendor decides to upgrade or downgrade a partner within a program. The available membership levels depend on the rules defined. The rules also determine the available upgrade membership levels on the partner home page.

4.4.13 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.

For information on how to set up locking rules, see *Oracle Partners Implementation Guide.*

4.4.14 Mandatory Rules

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

Mandatory rules help users 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.

For information on how to set up mandatory rules, see *Oracle Partners Implementation Guide.*

4.5 Program Privileges

Vendors have privileges to view, edit, and approve a program as listed below:

- All vendor users have viewing access to all programs created
- A program can be edited by their owners and team members
- Vendor users cannot edit programs that they do not own or if they are not team members

4.6 Program Approvals

Program owners/creators can define the individuals responsible for approving enrollment. Individual(s) can be designated by name or role. Those individuals will receive either an e-mail or notification alerting them to review partner enrollments.

Vendor users create programs and submit it for manager approval before publishing for enrollment.

A typical program approval flow is as follows. A vendor:

- Initiates the process of creating a program.
- Enters program overview information, that is, setup type, name, parent program link, program start and end dates, owner, partner type, country, language, and description.
- The program status is initially set to "New" which is the default value.
- When the vendor selects the "**Create**", program characteristic information, that is, Qualification, Benefits, Payments, Terms & Conditions are enabled on the side navigation links menu and ready for selection.
- When program characteristic information is completed and the vendor submits the program for approval, the program status changes from "New" to "Submitted for Approval". This initiates the approval process declared for the setup type selected for "Partner Programs". The approver is assigned and notified of the new program.
- A notification is sent to the assigned vendor manager requesting a program approval. If the manager approves, the program status changes to "Approved"; If rejected, program status changes to "Rejected".

- A notification is sent to the program owner notifying the new program status.
- If 'Approved', program owner can choose to activate the program.
- If 'Rejected', program owner can edit the program characteristics, and then re-submit the program for approval.

4.7 A New Partner Program within a Parent Program

Vendor program owners can create a partner program and map it to an existing partner program. The existing program is designated as the parent program, and the new program is deemed as the child program. A parent and child relationship is established during program creation. The child program inherits the parent programs' qualification requirements and attributes. The child program falls within the program hierarchy of the parent program. Partners can enroll only in membership type programs, which are leaf nodes in hierarchy. Program type programs can only be parents, and partners cannot enroll in them. Participants must adhere to qualifications of a child program to be approved for enrollment. The program is created with a name, description and program characteristic definitions. The program is then submitted for approval. The vendor manager will receive a notification requesting for program approval and approves the program. The program owner will receive notification of approval and activates program for enrollment.

4.8 A New Program Campaign for Existing Partners

Vendors use Oracle Partners to review the existing partner community. Vendors can search for specific partners to target, based on particular profile attributes. Vendors can download a list of eligible partners and design and create programs specifically for a targeted group. The program is approved and published for partner enrollment. Vendors can create marketing notification to recruit existing partners and send marketing campaign to list of partners.

4.9 Report on Number of Participants Enrolled in Active Programs

Reports are used to determine the effectiveness of programs. Vendors with access, can view the number of participants enrolled into each program, and drill down to view actual list of participants. Vendors can also view details based on the qualification rules defined for a program, number of partners within the system that are not yet enrolled in a program, but that would qualify for one.

5 Partner

The Partner tab provides for the entry and management of partner information.

A new partner can be created with a partner type. A partner can have one or more partner type specifying the expertise area of the partners. Each partner type has a meaning associated with it. While enrolling into programs, partner types are used to decide which programs have to be displayed in the home page bins for that particular partner.

This chapter consists of the following sections:

5.1 Create a Partner

Prerequisites

None

Responsibility

Vendor Admin

Navigation

Oracle Partners > Partner > Partners page

Steps

1. Click **Create**.

The Create Partner page appears.

2. Enter a unique name in the Organization text field.
3. Enter a name in the Organization Name Pronunciation field.
4. Enter a name in the Alias field.
5. Select a standard industry code type using the SIC Code Type LOV.
6. Select an SIC code using the SIC Code LOV.

   The SIC code version and SIC code cannot be modified unless a valid selection is made using the SIC Code List of Values.
7. Enter a Dunn and Bradstreet number in the DUNS Number field.
8. Enter a tax identifier in the Tax ID field.
9. Select a Phone Book using the Phone Book LOV.

   The phone book details include Country Code, Area Code, Number and Extension.
10. Select an e-mail address using the E-mail Address Book LOV.
11. Select a customer category using the Customer Category LOV.
12. Enter a value in the Business Line field.
13. Select an annual revenue using the Annual Revenue LOV.
14. Enter a value in the Total Employees field.
15. Enter a value in the Fiscal Year End field.
16. Enter a value in the Year Established field.
17. Select a website address using the Web Site LOV.
18. Enter a value in the Personal Mail Stop field.
19. Enter a value in the Hobbies field.
20. Enter a value in the Weekend Activities field.
21. Enter a value in the Vacation Plan field.
22. Enter a value in the Own Car field.
23. Enter a value in the Visit Date field.
24. Select a context value using the Context Value LOV.

25. In the Address region, select a country from the Country LOV.
26. Enter a value in the Address1 field.
27. Optionally, enter values in the Address2, Address3, Address4 fields.
28. Select a state using the State LOV.
29. Enter a value in the County field.
30. Enter a value in the City field.
31. Enter a value in the Postal Code field.
32. In the Attributes region, select a start date using the Start Date LOV.
33. Select an end date using the End Date LOV.
34. Select a status using the Status drop-down list.
35. Select the Do Not Mail check box if you do not want the partner to receive mail.
36. Select a reason using the Reason drop-down list.
37. Select a context value using the Context Value LOV.
38. In the Partner Details region, select a partner type.
39. Select a start date using the Start Date LOV.
40. Select an end date using the End Date LOV.
41. Select a partner level using the Partner Level drop-down list.
42. Select a purchase method using the Purchase Method drop-down list.
43. Select a preferred VAD using the Preferred VAD LOV.
44. Enter a value in the Target Revenue field.
45. Enter a value in the Revenue Year to Date field.
46. Select a channel manager using the Channel Manager LOV.
47. Select the Use in Automatic Matching check box to enable the partner to be used for automatic matching.
48. Select a phone support person using the Phone Support Person LOV.
49. Select the Sales Partner check box to indicate that the partner is a sales partner.
50. Select a channel marketing manager using the Channel Marketing Manager LOV.

51. For information on the Opportunity Exchange check box, see *Oracle Sales Online User Guide*.
52. Enter a value in the Original System Reference field.
53. Select an original system type using the Original System Type drop-down list.
54. Enter a value in the Maximum Users field.
55. In the Person Relationships region, select a person using the Add a Person LOV.
56. To erase a relationship, click the erase icon.
57. Select a job title using the Job Title drop-down list.
58. Enter a name in the First Name field.
59. Enter a name in the Last Name field.
60. Select a relationship using the Relationship drop-down list.
61. Select a phone number using the Phone Book LOV.
62. Select an e-mail address using the E-mail Address Book LOV.
63. Enter a title in the Job Title field.
64. Select the Decision Maker check box if the person is a decision maker.
65. In the Organization Relationships region, select an organization using the Add a Organization LOV.
66. To erase a relationship, click the erase icon.
67. Select a relationship using the Relationship drop-down list.
68. Enter a value in the Related Organization field.
69. Select a status using the Status drop-down list.
70. Select a start date using the Start Date LOV.
71. Select an end date using the End Date LOV.
72. Click **Create**.

5.2 Create a Contact

A contact for the organization is termed as point of contact for that organization for communication.

Prerequisites

None

Responsibility

Vendor Administrator

Navigation

Oracle Partners > Partner > Contact Tab

Steps

1. Click **Create Contact**.

   The Create Contact page appears.
2. Select a partner using the Partner Name LOV.
3. Enter a name in the First Name field.
4. Enter a name in the Last Name field.
5. Select a title using the Title drop-down list.
6. Enter a job title in the Job Title field.
7. Select a primary role using the Primary Role drop-down list.
8. Enter a value in the Phone field.
9. Enter a value in the E-mail field.
10. Select a start date using the Start Date LOV.
11. Select an end date using the End Date LOV.
12. Select a status using the Status drop-down list.
13. In the User Account Region, enter a name in the User Name field.
14. Select a country from the Default Country drop-down list.
15. Enter a value in the Password field.
16. Select a currency from the Default Currency drop-down list.
17. Enter a value in the Verify Password field.
18. Select the Administrator radio button to give the role of a primary user to the contact.

19. Select the Business User radio button to give the role of a business user to the contact.
20. Click **Create**.

5.3 Set up Partner Profile

Oracle Partners enables vendors to use profile attributes to segment their partners. The application provides intelligent matching based on these profile attributes to ensure that items are routed to the correct partner.

5.3.1 Adding Attributes to a Partner and/or Partner Contact

When an attribute is defined for the first time and the 'Expose to Partner' check box is selected, the attribute will be visible in the My Company tab. Attributes will be available to a partner if the particular partner type has been specified while defining an attribute.

For information on how to create an attribute, see "Set up Custom Attributes" in the *Oracle Partners Implementation Guide*.

5.3.2 Updating Attributes to a Partner and/or Partner Contact

Prerequisites

None

Responsibility

Vendor Administrator

Navigation

Oracle Partners > Partner > Partners page

Steps

1. In the partner summary page, click the Attributes hyperlink of a particular partner.

   The Profile Attributes page appears.
2. Select a date from the View Values as Of field and click **Go**.

The appropriate records appear and the system returns a snapshot view of the attribute values for the partner as of the date chosen.

3. Select a value from the View Memberships By Status drop-down list and click **Go**.

   The appropriate records appear.

4. Click **Edit** in the desired attributes region.

   The Update General Attributes For xxx page appears.

5. Make the necessary changes and click **Apply**.
6. Click **Revert** if you want to undo your changes.
7. Click **Back**.

   The Profile Attributes page appears.

8. Click **View History** to view history of attributes for the selected category. This is only available for non-derived attribute values.
9. Click the **Add Validation** icon.

   The Enter Validation Information For xxx page appears.

10. Select a date using the Date Validated LOV.
11. Select a person using the Validated By LOV.
12. Submit a proof of validation using the Proof of Validation LOV.
13. Enter notes in the Note field.
14. Click **Create**.

    A confirmation message appears that a new item has been created.

15. In the Profile Attributes page, click the **Validation History** icon.

    The Attribute Validation History For <xxx> page appears.

16. Click **Back** to return to the Profile Attributes page.

Guidelines:

When attributes are associated for a particular partner on the user interface, the concurrent program PV- Refresh Attribute Text table must be run, so that this data becomes available to the Partner Matching program.

6 Opportunity

The following tasks have to be performed in Oracle Partners:

- Section 6.1, "Opportunity Matching"
- Section 6.2, "Tracking Opportunity Flow and Status"

6.1 Opportunity Matching

There are several ways to generate a partner list for Opportunity Matching. Use the appropriate general criteria selected at setup. Supplement those by manually creating and narrowing specific attributes and ranking them.

Oracle Partners's partner matching engine creates a recommended partner list for the specific opportunity. This list matches the details of the opportunity with details on a partner's profile. If a partner matches more attributes than another partner, it will automatically rank higher on the recommended partner list.

Use this procedure to match an opportunity with a partner.

Prerequisites

An opportunity must exist.

Responsibility

Vendor User/Administrator

Navigation

Oracle Partners > Opportunity > Opportunities page

Steps

1. Search for Indirect Opportunities.
2. Click the **Opportunity** hyperlink with an 'Uassigned' status.

   The Opportunity Details page appears.
3. Click the **Partner** side navigation link.
4. Click **Attributes** to view or update any of the profile attributes.

   The Profile Attributes page appears.
5. Make the desired changes and click **Back** on the browser.

   The Opportunity Details page appears.
6. Select a value from the Requested Service drop-down list.
7. Enter a value in the QTY field.
8. Select a valued from the UOM drop-down list.
9. Enter a value in the Amount field.
10. In the Partner field, click **Go**.

    The Select a Partner page appears.
11. Click **Select** to select a partner.

    The Opportunity Details page appears.
12. In the Preferred Partner field, click **Go** to select a preferred partner.

    The Select a Partner page appears.
13. Click **Select** to select a partner.

    The Opportunity Details page appears
14. Click **Routing History** to view routing history details.

    The Routing History Details page appears.
15. Click **Back** to return to the Opportunity Details page.
16. Add more partners to the list using the Automatic Partner Matching or Manual Search LOV and click **Go**.

    Automatic partner matching will search for a rule that applies to the opportunity and select the most appropriate partner(s) based on that rule. If multiple rules apply, they are ranked for precedence.

Manual matching allows users to search for partners based on their profile including geo-proximity. After the list of partners is returned to users, they can select one or more partners.

17. Select one or more partners and click **Select**.
18. Click **Update** to save your changes.
19. Select a routing type using the Routing Type LOV.

    The routing method determines how the opportunity is offered to partners on the list:

    – **Multiple-Parallel:** The opportunity is offered to all partners on a first come first serve basis. Only one partner can work on an opportunity at a time. If users want to do multiple matching, they need to select at least two partners from the partner LOV window.

    – **Joint:** The opportunity is offered to all partners. Multiple partners can accept the opportunity and work jointly on that opportunity.

    – **Multiple Serial:** The opportunity goes to partners ranked "1" first. If they reject the opportunity, it goes to the next partner on the list.

    – **Single:** The opportunity goes to the partner ranked "1" only.

20. To bypass the channel manager approval, select the Bypass Channel Manager Approval check box.

    If the channel manager approves it, the status changes from matched to offered.

21. Click **Submit Routing**.

While an opportunity is being offered to partners, the vendor user can monitor the status of each opportunity as involved parties (Vendor or Partner User) shepherd them toward closure.

For more information on the Opportunity Tab, see *Oracle Sales Online User Guide*.

6.2 Tracking Opportunity Flow and Status

Features Associated with Opportunity Flow Steps:

1. Create Opportunity: Import opportunities from Oracle Telesales. Enter manually into OTS or OSO. Enter manually into Oracle Partners.
2. Match Opportunity with Partner: Rank Partner, Automated Search, Manual Search.

3. Assign Opportunity to Partners: Options for routing single, serial, broadcast and joint selling.
4. Channel Manager Reviews the Assignment: Assignment options: approve, reject, or modify. CM timeout sends lead to partner.
5. Partner Accepts/Declines Opportunity: Partner accepts or declines the opportunity. If partner accepts, status changes to Active. If partner declines a single offer, it returns to unassigned pool. If partner declines a serial offer, it goes to the next partner.
6. Process Partner: Track Partner’s progress with opportunity. Routing Status: on hold, won, lost, and recycled.

Routing status during opportunity flow:

1. When an indirect opportunity is created, it is initially unassigned.
2. After a partner is identified and the opportunity is submitted, the routing is matched (if the channel manager is bypassed, the opportunity is offered)
3. Routing is offered after approval from the channel manager.
4. Opportunity is active after the partner accepts it.

Opportunity assignments approved by the Channel Manager:

1. Workflow automatically changes routing status to offered and routes the opportunity to the partner.
2. The partner user cannot update an routing status when it is in the offered status.
3. The opportunity assignment field in the opportunity summary page cannot be modified by the channel manager during the time period between the channel manager’s acceptance and the partner’s acceptance of the opportunity.
4. If the offer is declined and it is a single assignment offer, Workflow automatically re-routes it to the channel manager with recycled status.
5. If the offer is declined and it is a serial assignment offer, Workflow automatically re-routes it to next assigned partner and to each successive partner until it is accepted or reaches the last partner.
6. If none of the partners accept the opportunity, the routing status is changed to “recycled” and is sent back to the assignment manager.

7 Partner Enrollment

Enrollment enables vendors to administer and expedite the registration of partners into Oracle Partners system and then the enrollment of these partners into partner programs.

Section 7.1, "Partner Registration Setup"

Section 7.2, "Enrolling a New Partner into a Program"

Section 7.3, "Program Enrollment Setup"

Section 7.4, "Enrollment Process"

Section 7.5, "Recruit and Enroll Existing Partners into a Program"

Section 7.6, "Enrollment Request"

Section 7.7, "Enrollment Request Overview with Advance Search Capabilities"

Section 7.8, "Enrollment Approval Process"

Section 7.9, "Enrolled Partners within a Program"

Section 7.10, "Team"

Section 7.11, "Stop Enrollment into a Program Past a Certain Date"

Section 7.12, "Access Privileges for Administrator and Enrollment Approver"

Section 7.13, "Partner Program and Enrollment Reports"

7.1 Partner Registration Setup

A vendor needs to recruit and collect partners to be a part of the indirect sales channel. Adding partners helps increase the sales force of the vendor's organization. In order to build a partner community the vendor has to find a way to collect information about organizations that are interested in becoming partners. The vendor markets the benefits of becoming a partner, on the corporate website. The vendor instructs organizations that are interested in taking advantage of such benefits to "Register Online as a Partner".

Once an organization initiates the registration process, they are guided through a series of steps to submit their company and user information. Once this information is submitted, Oracle Partners generates a company and user account for the partner. A partner profile is also created within the vendor's partner system. The partner is given a username and password to log in to the partner system. The username and password is used to identify the partner when entering the system. The partner is given limited access when entering the partner system. Partners must enroll in various partner programs to attain more benefits from the vendor.

7.2 Enrolling a New Partner into a Program

When a vendor wants to recruit partners to build their indirect sales force for a particular industry sector, a marketing campaign is created to entice new and existing partners to enroll in a program designed for that sector. Once executed, the campaign will draw new and potential partners to the vendor's website to inquire more about the new program. When partners visit the vendor's site, they are first asked to either login or register as a new partner. Existing partners log in by submitting their username and password. New partners are guided through the registration process to receive their username and password into the partner system.

Once partners are authenticated and logged into the system, they are expedited to the partner portal home page. The partner portal home page has additional information about the new partner program with a link to "Enroll Now" into the program. Once the partner initiates the enrollment process, they are guided through a series of steps to provide more information about themselves.

See Enrollment Process for more information.

7.3 Program Enrollment Setup

Partners can initiate enrollment through self-service within the partner home page. Once initiated, the partner is guided through the process of completing an enrollment form, reviewing enrollment form summary, viewing and signing a contract online, and submitting payment for membership fees. When the enrollment is submitted, a Thank You page is displayed to the partner.

The enrollment process is made up of three parts.

- an enrollment form, that lists questions to be answered by the partner
- a contract section, that the partner has to review and accept
- a payment section, where the partner has to submit some form of acceptable payment

The vendor creates self-service enrollment applications to capture information about new and existing partners enrolling. There is a section to capture specific partner information, pertaining to their line of business depending on the program they select to enroll in. All questions on the enrollment forms are saved within the partner profile that is generated.

In addition to partner information, the vendor also captures the partner's payment information, and their click wrap acceptance of the legal terms (contracts, terms and conditions) pertaining to the program. Payment and legal terms are optional elements to a program. Programs may require no payment and legal terms for the enrollment process.

Once partners complete and submit their self-service enrollment form, proper approval routing will be initiated within the vendor organization. Using Oracle Approval Management framework, enrollment requests will be routed to the appropriate approvers. Designated individuals will be able to "Accept" or "Decline" partner enrollment into a program. Vendors will have to configure various approval rules within Oracle Approvals Management (AME).

When an enrollment is approved, the contact person for the partners is notified through e-mail of their logon name, password and URL location to access Oracle Partners.

7.4 Enrollment Process

The enrollment process is initiated when a partner selects the 'Enroll Now' link on the partner home page. The partner is presented the first page of the online enrollment form when the process begins. The enrollment form is presented as is defined within the partner program. Once the enrollment form is complete, the Enrollment Form Summary is presented to the partner. After the partner reviews the enrollment form questions and answers them, the Legal Terms or Contracts page is presented. The Program Membership Payment page follows the Program/Membership Legal Terms page i.e, once the partner reviews the legal terms and "Accepts" the contract, the Payment Page is presented. Similarly, the Payment Authorization window follows the Program/Membership Payment page. i.e, when the partner submits the payment terms information, the Payment Authorization Page is presented. The Thank You for Enrollment page follows the Payment Authorization page.

7.4.1 Enrollment Form

This form is presented when a partner wants to enroll into a program. The questions are displayed according to the formatting and sequencing as defined with the partner program enrollment form.

7.4.1.1 Questionnaire for Partner Enrollment

Vendors can create a list of questions to be displayed to partners during the enrollment process. They can create a questionnaire element (Pagebreak, Section, or Question), delete one, or move up/down. The questions can be linked to actual partner attributes to create partner profile. The questions are provided on a general enrollment template for vendors to roll out to customers and vendors can enter additional information like title, header or footer information. Partners can fill in an enrollment form that contains information based on the title, header and footer provided.

For information on enrollment form, see Enrollment Form in Chapter 4, "Program".

7.4.2 Enrollment Form Summary

The Enrollment Form Summary is retrieved from the list of questions created for the partner program. Partners can review their answers in the enrollment form before submitting. They can view a summary of their enrollment form. Partners can also make corrections or edits to any answer within the enrollment form before submitting.

For information on enrollment form, see Enrollment Form in Chapter 4, "Program".

7.4.3 Partner Program/Membership Legal Terms

Partners can view legal terms, and input the legal binding party name, title, and date. These values are the legal binding party values on the contract. Partners can view the contract in a printable format during enrollment. Legal terms per program or membership level can be based on the geographic location of the partner enrolling. Oracle Partners retrieves the proper contract template associated to a program or membership. Rules defined within the legal terms of the program, determine the contract template that needs to be retrieved for the partner.

For information on legal terms and contracts, see Legal Terms in Chapter 4, "Program".

Partners can also view the appropriate legal terms defined for a region for a program or membership level. Partners can either "Accept" or "Not Accept" the terms of the legal document. Partners can also select "Print and Fax/Mail" option for the legal terms of the program. Partners selecting this option are allowed to continue their enrollment process.

7.4.3.1 Accept Contract

If the partner selects "I Agree":

- an actual contract is created between the vendor and the partner
- the contract is created with the inputted binding party name, title, and date
- the contract is created in Oracle Contracts Core
- the binding party name must be created in TCA and placed within the "Contact" field within contract
- the status of the legal section of the partner enrollment is updated to "Accepted"

7.4.3.2 Do Not Accept Contract

If the partner selects "I Do Not Agree":

- No contract is created between the vendor and the partner. By not accepting the legal terms, the partner will be informed that they will be terminating their entire enrollment process
- The partner is asked whether or not they want to continue
  - If the partner selects "Yes", the entire enrollment process is aborted and the partner is returned to the partner home page. The data for the enrollment form is saved.

- If the partner selects "No", they are navigated back to the active window and asked again to "Accept" the legal terms

7.4.3.3 Print and Fax/Mail Contract

If the partner selects "Print and Fax/Mail":

- an actual contract is created in "Entered" status between the vendor and the partner
- the contract is created WITHOUT the inputted binding party name, title, and date
- the enrollment request status is set to "Submitted"

There are two options in the execution of benefits for the "Print and Fax/Mail" option:

1. Activate Benefits and Contract when the enrollment is approved and before receiving the actual receipt of the contract from the partner
   - The enrollment request is created with "Awaiting Approval" status
     - Contract is created in "Entered Status"
   - When enrollment request is "Approved"
     - "Start" and "End" dates of contract are entered to coincide with the enrollment duration
     - Partner responsibilities are assigned
   - When contract is "Received" or "Accepted" by partner through fax or mail
     - Vendor admin enters "Signed Date" and "Binding Contact" info
2. Activate Benefits and Contract when the actual physical contract is received through fax or mail·
   - The enrollment request is created with "Submitted" status
     - Contract is created in "Entered" status
   - When enrollment request is "Approved"
     - No action occurs
   - When contract is "Received" or "Accepted" by partner through fax or mail
     - "Start" and "End" dates of contract are entered to coincide with the enrollment duration

  - Vendor admin enters "Signed Date" and "Binding Contact" info
  - Contract is activated
  - Partner responsibilities are assigned

7.4.4 Accept Input From Partner for Payment

Partners can view the fees of a program enrollment including appropriate local taxes and currency. Partners can submit their payment information for enrollment into a program. They can pay by credit card, checks, purchase order, wire transfer, or cash. They can also submit their "Bill-To" information.

7.4.5 Payment Authorization

Partners can review the status of the payment information they have submitted. After review, partners can:

- authorize payment and continue enrollment process
- edit payment information by returning to the Payment Submission window
- cancel enrollment process and exit out back to the partner home page

7.4.6 Thank You

Partners can view a Thank You page indicating that the enrollment process has been successfully completed. This page enables partners to return to the partner home page. The Thank You window text is configured by the vendor deploying Oracle Partners. The application will have a seeded statement that should be changed according to the vendor's requirements.

7.5 Recruit and Enroll Existing Partners into a Program

Vendors can search the existing community of partners and construct lists of eligible partners to target for a particular program. Notifications have to be sent to partner contacts, to be recruited into program. URLs have to be included within a notification for a partner to access program details information. Partners receiving notification can click the URL and be routed to program details information on the vendor Web site.

7.6 Enrollment Request

An approver needs to know all the pending approvals for him. The Enrollment Request Summary serves the purpose of listing the summary of pending approvals. If the user is an administrator, he gets to see all enrollment requests that are pending. If the user is a normal user, he gets to see only the Enrollment Requests pertaining to him.

Vendor approvers can view the details of an enrollment request. Vendors can make a decision on the enrollment request of the partner. The details include information about the partner's company, enrollment form, contract, and payment submitted. Information about the statuses of each one of the elements (enrollment form, contract, and payment) as well as the overall status of the requests can also be viewed. All this information is available for the approver to make a decision on the "Approval" or "Rejection" of the partner enrollment request. Besides reviewing all the pertinent information, the approver can actually "Approve" or "Reject" the enrollment request. Vendors can also view the enrollment log. The log captures events pertaining to an enrollment request and events such as change of statuses, or information. If defined for the program, the details also provides a checklist of tasks for the approver to complete before they can approve a request. The checklist can be enforced depending on the settings in the program or membership level definition.

The enrollment request details is a summary of the information submitted by the partner for enrollment. It has the following sections:

- Partner Header Information
- Enrollment Form
- Contract
- Payment
- Benefits to Partner
- Approve, Reject

7.6.1 Partner Header Information

The header information section contains data retrieved directly from the partner and the program definition. Information such as partner name, program name, contact information is automatically populated as read only text.

7.6.2 Enrollment Form

The enrollment form section contains the current status of the "Automatic Qualification Status" of the enrollment form submitted by the partner. The form submitted is measured against the requirements defined for a program. Oracle Partners automatically grades the answers submitted by the partner against the requirements defined for a program. The status can be either:

- Passed Qualification - which means the partner has passed ALL the qualification questions for the program
- Failed Qualifications - which means the partner has failed AT LEAST one or more qualification questions for the program

A partner can still be approved for enrollment even if the enrollment form status is "Failed". The status does not stop a partner from being enrolled in a program. Approvers can approve a partner that has failed a qualification requirement. Approvers can view all the questions and answers of the partner enrollment form and also view the criteria of each question as defined within the partner program. Questions that the partner has failed will have a red line indicating 'Failed Qualification Criteria'. Also, the corresponding qualification requirements will be displayed in red colour. The approver can choose to update this information. When information is changed and the approver selects "Apply", the enrollment form is re-evaluated. The status of the enrollment form can change accordingly.

7.6.3 Contract

The Contract section contains the name of the contract attached to the current enrollment request. This is the name of the contract that the partner accepted during enrollment. This section also contains a Contract Status. The status of the contract can be:

- "Accepted" - which means the partner has selected the "Accept" button during the enrollment process
- "Awaiting Contract" - which means the partner has selected to manually print out the contract to either mail or fax the vendor
- "Not Signed" - when the contract information is not comple
- "Rejected" - when the partner rejects a contract

Vendors can change the contract status of an enrollment request. Vendors can view detailed information of the contract. The approver can view:

- Binding Party Company Name

- Binding Party Contact Name
- Contract Sign Date - date when the partner signs the contract. For online acceptance this is the date of the enrollment request.

Vendors can view a read only version of the contract and can also change the Contract Status.

7.6.4 Payment

The Payment section contains all the fees related to the enrollment of a partner into a program. This section contains the payment method as well as the payment status of the enrollment request. The taxes, discounts are calculated through an integration with Order Management during the enrollment process. The information is stored within the enrollment request and displayed in this section.

Approvers can view detailed payment information about the enrollment request. The approver can change this information if required. The approver can change the payment method of the partner, and input new payment information for the partner.

7.6.5 Benefits

This section displays the benefits the partner will receive if they are enrolled in the program. This lists all the benefits defined for the program in read only form. This information is retrieved from the program definition.

7.6.6 Approve or Reject

In this section, approvers can take action on the enrollment request. The approver can either Approve or Reject the enrollment request.

Approving a request, changes the enrollment status or can initiate the continual routing of the request to the next approver.

- Final approval kicks off a notification to the partner to inform them that they have been approved
- Approved partners will be added to the list of enrolled partners
- Approved partners will immediately receive the benefits of the program

Rejecting a request changes the enrollment status.

- Rejection will terminate routing of the enrollment request. There will be no need to continue routing to additional approvers.

- Rejected partners will be notified

Approver have to review a task list before they officially approve a request. This task list can be strictly enforced during program definition. If completion of the task list items are required before approval, the approver must enter the Enrollment Checklist window and check off all tasks.

7.7 Enrollment Request Overview with Advance Search Capabilities

Vendors can view a overview summary of all the enrollment requests for a program. The vendor can review a list of enrollment requests for a program.The vendor can access an advanced search on all enrollment requests for all the programs within the system. The vendor can perform a search based on a list of criterion. When the search is performed, the vendor is brought back to the overview window with the results.

The Enrollment Request Overview displays a list of all enrollment requests submitted into the system. Vendors can search by various attributes that is partner name, status, program, date, and so on. Oracle Approvals Management framework is used to determine the routing of enrollment requests. All the approvers for a program are configured within AME framework. Only approvers of the program are allowed to process and approve requests submitted by the partner. The vendor user can see the enrollment requests assigned to themselves or to the group. Oracle Partners retrieves the list of approvers defined within AME and only enables the processing for those individuals. The advanced search capability enables the vendor user to customize the results table in the display order that they desire.

7.8 Enrollment Approval Process

This module provides functionality to submit enrollment requests for approval. It also integrates with Oracle Approvals Management to find out approvers that are defined for the application. It also incorporates the workflow integration to notify approvers and send reminder notifications. The module also provides infrastructure for an approver to approve an enrollment request. This also involves logics for creating memberships, granting responsibility, activating contract etc. associated with creating membership.

When a partner user submits an enrollment request, the appropriate approver needs to be identified by the application and the approver needs to be notified about the enrollment request. Also if the approver has not take action for 'N' no of days, the system should send reminder notifications until the approver takes action. Once the approver approves the request, the partner should be enrolled into the program automatically with valid membership dates/contract dates. Also the partner users should be granted required responsibilities to access the different benefits associated with the program. It also needs to take care of the different business scenarios depending on the enrollment type.

Vendor users create programs and submit it for manager approval before publishing for enrollment.

A typical program approval flow is as follows. A vendor:

- Initiates the process of creating a program.
- Enters program overview information, that is, setup type, name, parent program link, program start and end dates, owner, partner type, country, language, and description.
- The program status is initially set to "New" which is the default value.
- When the vendor selects the "Create" button, program characteristic information, that is, Qualification, Benefits, Payments, Terms & Conditions are enabled on the side navigation links menu and ready for selection.
- When program characteristic information is completed and the vendor submits the program for approval, the program status changes from "New" to "Submitted for Approval". This initiates the approval process declared for the setup type selected for "Partner Programs". Approver is assigned and notified of new program.
- A notification is sent to the assigned vendor manager requesting a program approval. If the manager approves, the program status changes to "Approved"; If rejected, program status changes to "Rejected"
- A notification is sent to the program owner notifying the new program status.
- If approved, program owner can choose to activate the program.
- If "Rejected", program owner can make edits to program characteristics, and then re-submit the program for approval.

7.8.1 AME Set Up

Oracle Approvals Management (AME) is a self-service web application that enables users to define business rules governing the process of approving transactions in other Oracle Applications. Rules are constructed from conditions and approvals. Enrollment request approvals are integrated with AME.

Once a set of rules for a transaction type ('ENRQ' - for enrollment approvals) is defined, Oracle Partners communicates directly with AME to manage the approval process. Oracle Partners communicates with AME when an enrollment is submitted for approval and each time an approver respond's to the enrollment request until all approvers have approved the enrollment request. AME records each approval and recalculates the approver list for the enrollment request each time an approver responds to a request for approval. By recalculating the approver list, AME guarantees that the enrollment requests are always approved according to the most current business data possible.

For more details on AME, visit their website at
`http://www-apps.us.oracle.com:1100/ame/`

AME returns an approver ID, which is used to trigger workflow notification to that approver from Oracle Partners. An exception to be noted in Oracle Partners is that if no rule satisfies the enrollment criteria, AME will return an empty record (this is again depending on a mandatory attribute configuration which is AT_LEAST_ONE_RULE_MUST_APPLY. This is set to false for Enrollment Approvals) and the request is forwarded to a default approver defined in Oracle Partners.

7.8.2 Approve or Reject Enrollment Request

When an enrollment form is submitted for approval, the enrollment request is routed through the approval process defined for the program. The partner is notified about the status of their enrollment request. Partners approved will automatically receive the benefits of the new program. Additional benefits and privileges will be expedited to the partner. These access privileges will be reflected when the partner logs into the partner portal.

7.9 Enrolled Partners within a Program

The list of partners enrolled, gives the summary of partners enrolled for a particular program membership level. Enrolled Partners Overview provides the functionality to track partners enrolled.

Vendors can report on individuals enrolled in a particular program. Vendors can further view detailed information of partners enrolled in a program like contract status and balance.

Vendors can view a list of enrolled partners within a partner program/membership with a list of partners with the primary contact name, and their respective start and expiration dates of enrollment.

7.9.1 Downgrade Partners

This functionality enables vendors to forcefully downgrade a list of selected partners from one level to another as per defined upgrade implicit downgrade) rules. Vendors can select a program or membership level to downgrade a partner, and then edit a message to be sent to the partner using the workflow engine. Notifications are sent to partners regarding this action.

Downgrade takes immediate effect, the current membership is end dated for a partner and the partner is automatically enrolled into the new membership. The contract is also upgraded to this new membership.

7.9.2 Upgrade Partners

Upgrade partners provides the functionality to send invitations to partners to upgrade to a new membership level as per defined upgrade rules. Vendors can view a list of selected partners for upgrade within a program. Vendors can select a program or membership level to upgrade a partner, and then edit a message to be sent to the partner(s). Vendors can also extend a discount amount or percentage to all the partners selected for their enrollment fees into the new program.

7.9.3 Invite Partners

Invite partners provides the functionality to send invitations to partners with discount/waivers. Vendors can search for one or many partners, select them, and then invite them to enroll in a program. The invitation e-mail is sent to the partner with the option of attaching a discount to the enrollment fee of the program or membership level. The discount can be an amount value or percentage off of the enrollment fee.

7.9.4 Terminate Partners

This functionality forcefully terminates enrolled partners from a given membership level. The administrator selects a reason for termination and a message is stored in History Log. The partner is terminated with immediate effect and the current membership is end dated for the partner. The contract is also terminated and a notification is sent to all the primary users of the partner organization informing about termination of the membership.

7.10 Team

This functionality enables vendors to add users to a program. These users have access to the program and can update program details.

7.11 Stop Enrollment into a Program Past a Certain Date

This functionality enables the ability to stop partners from enrolling into a program past a certain date. Vendors can close a program from further enrollment by partners. The program ceases further enrollment by any partner, past the date that is specified by the vendor user.

7.12 Access Privileges for Administrator and Enrollment Approver

The update privileges of the vendor administrator and approver for the partner enrollment process are:

Administrator

- Access to update the enrollment request
- No access to approve

Approver

- Access to update the enrollment request
- Full access to approve enrollment request

7.13 Partner Program and Enrollment Reports

This functionality enables vendors to report on program and enrollment activities. They can report on the progress, development, and success of programs created. This functionality also provides the vendor with an overview of partners enrolled within a program.

The Reports Overview consists of:

- Program and Membership Level Overview Report - This report provides a detail list of all the program and membership levels created within the system
- Partner Enrollment Overview Report - This report provides a detail list of all the partners enrolled within the programs and membership levels within the system

The Program and Membership Level Report consists of:

- Filters - various field values to limit report search
- Display Options - display columns to customize view
- Sort Options - display rows to customize view
- Save - save a report under a particular name for future use
- Save and Run report - saves a report under a particular name for future use, and executes the report
- Run - button to execute report
- Restore - button to restore previous values in search filters
- Cancel - button to cancel from current window and return to overview page

The Partner Enrollment Overview Report consists of:

- Filters - various field values to limit report search
- Display Options - display columns to customize view
- Sort Options - display rows to customize view
- Save - save a report under a particular name for future use
- Save and Run report - saves a report under a particular name for future use, and executes the report
- Run - button to execute report
- Restore - button to restore previous values in search filters
- Cancel - button to cancel from current window and return to overview page

Part IV

Partner User

This part contains the following chapters:

8 Home Page

There are additional bins for partners to view partnership programs and initiate the enrollment process. This chapter has the following section:

Section 8.1, "Additional Bins on Home Page"

8.1 Additional Bins on Home Page

Partners can view partnership programs and enroll into new partnership programs or upgrade/renew their membership.

8.1.1 My Enrolled Programs

This bin displays only active membership programs and those awaiting approvals. There are three columns in this bin:

- Program name: This bin displays the name of the program that the partner is enrolled into or applied for. Program name is hyperlinked to the 'Program Summary' page.
- Status: Enrollment status
- Membership end date

8.1.2 Incomplete Enrollments

This bin displays all the incomplete enrollment applications submitted by the partner. There are two columns in this bin:

- Incomplete Enrollment Applications: displays the name of the program that the partner is enrolled into or applied for. Program name is hyperlinked to the incomplete enrollment application. Users are prompted to review all the information submitted before.

- Last Modified Date: The date on which the partner last updated the enrollment request.

8.1.3 New Programs

This bin displays all the programs that the partner is eligible to apply. Essentially, this bin displays all the programs (membership nodes) that are at the first level in the upgrade hierarchy (If a partner is terminated from a program or if the membership has expired, such programs are displayed.) There is only one column in this bin:

- Program name: displays name of the available program. Program name is hyperlinked to the 'program summary' page. Partners can initiate enrollment process from this page.

8.1.4 Program Renewals

This bin displays a partner's enrolled programs for which the expiration date is approaching (within the grace period) or has already expired. A program appears in this bin for a partner when the first renewal notification (regarding membership expiration) is sent to that partner. There are two columns in this bin:

- Program name: displays the name of the program. Program name is hyperlinked to the 'program summary' page. Partners can initiate enrollment process from this page.

8.1.5 Available Program Upgrades

This bin displays all the upgrade programs that the partner is eligible to apply (based on partner's current enrollments and upgrade rules). There is only one column in this bin:

- Program name: displays the name of the available upgrade program. Program name is hyperlinked to the 'Program Summary' page. Partners can initiate enrollment process from this page.

If there are three programs A, B, and C, the upgrade rules are A>B, A>C. If partner is enrolled in A, both B and C appear in the upgrade bin. If partner upgrades to B, C still appears in the upgrade bin.

If the upgrade rules are: A->C and B->C; partner is enrolled in A and B. C appears in the upgrade bin. Once partner upgrades to C, it is removed from the bin.

If the rules are: A >C >D; B >C; partner is enrolled in B and D; C are not displayed in the bin as partner is already at a higher level in the hierarchy.

8.1.6 Program Notifications

This section displays all the notifications sent to partners related to partner programs. This includes:

- Enrollment invitation notifications
- Program renewal notifications
- Program upgrade notifications
- 'Contract not received' notifications
- Enrollment request 'Thank you' notifications
- Enrollment request 'Approval' notifications
- Enrollment request 'Rejection' notifications

User can view notification details by choosing each hyperlink. For 'Actionable' notifications, such as, 'renewals', 'upgrades', and 'invitations', 'notification detail' page provides a mechanism to initiate the action. The '**Delete**' button next to each notification to enable users to delete the notification.

For more information on the Home Page, see *Oracle Sales Online User Guide.*

9 Partner Enrollment and Registration Flow

This chapter describes the partner enrollment and registration process and has the following section:

- Section 9.1, "Process Flow"

Partner registration and enrollment enables vendors to administer and expedite the registration of partners into Oracle Partners and the enrollment of these partners into partner programs. Partner organizations can register themselves and create primary user account for users belonging to the organizations using a self-registration process. Once the partner organization is registered, the primary user (Partner Admin) can create additional primary users or business users.

The User Management Framework of the Oracle E-Business Suite manages partner registration. Registration involves the creation of a user and company account following the collection of general data from the partner. User management allows prospective partners to use the self-registration process to register their company as a partner. During self-registration, partner users can also register themselves as the contacts of the organization by providing their details.

The registration process also involves managing features such as:

- Registration approval
- Company and user account creation
- Profile management
- Username and password authentication
- Password reset
- Lost username and password
- Existing partner account finder

- Invitation for partner registration by 3rd party
- Integration with portal
- Change company information
- Online saving and revisiting of incomplete registration forms

9.1 Process Flow

Oracle Partners has two types of registration flows to register users.

- A prospective partner user will use external flow (self-service registration) to register the company and himself/herself.
- Additional partner users can be registered using internal flow. A partner (either primary or business) user or a vendor employee can launch this flow based on their privileges.
- Change an existing partner user role from Partner Admin to Business User and vice versa.

9.1.1 Self-Service Registration (External Flow)

A prospective partner user can initiate this flow either from 'Register Here' link in Oracle Partners or by using any other custom link like 'Register My Partner Organization' provided on any page at the implementation time, which leads to the same flow.

Partner organizations and first partner users have to be registered and partner type details have to be captured as part of this flow. Partner user registered here is always registered as primary user. Default roles and responsibilities will be granted to partner user upon the completion of the registration flow.

The User Management framework provides a seeded user type template ('Users/New organizations') to capture organization details, and user details. This template can be reused to create an organization, organization address, phone number and fax number in TCA. This can also create a person, 'EMPLOYEE_OF' of relationship between person and organization, create person primary e-mail address, phone number and register user account for this person.

9.1.2 Additional Users Registration (Internal flow)

A partner (either primary or business) user or a vendor employee can launch this flow based on their privileges. Additional users can be registered either as primary or business users. Additional user creation can be initiated as part of partner contact creation process or can be a separate flow from partner contact details page once partner contact gets created.

This flow also supports switching a primary partner user to a business user and vice versa.

The User Management framework is used to retrieve metadata information like default role and responsibility for primary and business users but granting the roles/responsibilities is handled outside of user management.

9.1.3 Updating an Existing User's Responsibilities

User role can be switched from primary to business or vice versa. When a user's role is switched, the following happens:

1. All the existing responsibilities are revoked.
2. The user gets a new set of primary/business responsibilities based on the programs that the partner is enrolled for , if there are no programs enrolled, then the default primary or business responsibility is assigned to the user.

10

My Company

This chapter describes the tabs that a partner can view and update. It has the following sections:

- Section 10.1, "Viewing and Updating My Company's Main Details"
- Section 10.2, "Viewing My Company - Profile"
- Section 10.3, "Creating My Company - Contact"
- Section 10.4, "Viewing My Company - Sales Team"
- Section 10.5, "Viewing My Company - Legal Contracts"

The My Company tab, viewable by a partner only, enables partners to update and view information related to their organization. Partners can check for accuracy and make necessary updates from time to time. The information is captured by a vendor. It includes:

- Basic partner company information
- Extended partner profile
- Partner contact management
- Vendor sales (alliance) team working on the partner account
- Outstanding partnership contracts between partner and the vendor

Partners can view and update the following information:

10.1 Viewing and Updating My Company's Main Details

Partners can use this page to view and update details of their company, if they are working for a partner organization. Partners can view information like annual revenue, total employees, business category, addresses and other identifying information. Partners can also create an address from this page.

This tab displays basic information about the company such as name, SIC code, phone numbers, annual revenue, total employees, business category, total employees, addresses, and other identifying information. Partner can make changes as necessary.

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click the **Main** side navigation link to view basic partner company information.
2. Make changes as necessary and click **Update** to save your changes.
3. Click **Create Address** to create an address.

   See the procedure below to create an address.

10.1.1 Create Address

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click **Create Address** to create an address.

   The Create New Address page appears.
2. Select a country from the Country LOV.
3. Enter a value in the Address1 field.
4. Optionally, enter values in the Address2, Address3, Address4 fields.
5. Select a state using the State LOV.
6. Enter a value in the County field.
7. Enter a value in the City field.
8. Enter a value in the Postal Code field.
9. Select a start date using the Start Date LOV.
10. Select an end date using the End Date LOV.
11. Select a status using the Status drop-down list.
12. Select the Do Not Mail check box if you do not want the partner to receive mail.
13. Select a reason from the Reason LOV.
14. Select a context value using the Context Value LOV.
15. Select an address type using the Address Type drop-down list.
16. Select the Primary check box to make the address a primary address.
17. Select a start date using the Start Date LOV.
18. Select an end date using the End Date LOV.
19. Select a status from the Status drop-down list.
20. Click **OK** to save your changes.
21. Click **Restore** to return to the Create New Address page.

10.2 Viewing My Company - Profile

Displays extended profiles captured by the vendor about the partner company. Only the profile attributes with 'Expose to partner' flag set to true are displayed. Partner can make changes as necessary.

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click the **Profile** side navigation link to view details of existing partner profile attributes.

10.3 Creating My Company - Contact

Use this page to create, update and view profiles of partner contacts. This page displays all the contacts and for the partner organization. All the contacts have a relationship 'Employee of' with the partner organization. Partner administrator can create additional users as necessary. System determines applicable user responsibilities based on partner's program enrollments, responsibilities associated with partner programs, and user type for the contact (business user or administrator). User can view extended user profile by choosing a partner contact.

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click the **Contact** side navigation link to view all the contacts for the partner organization.

   The My Company - Contacts page appears.

2. Click **Create Contact** to create a contact.

   The My Company - Create Contact page appears.

3. Enter a name in the First Name field.
4. Enter a name in the Last Name field.
5. Select a title using the Title drop-down list.
6. Enter a job title in the Job Title field.
7. Select a primary role using the Primary Role drop-down list.
8. Enter a value in the Phone field.
9. Enter a value in the E-mail field.
10. Select a start date using the Start Date LOV.
11. Select an end date using the End Date LOV.
12. Select a status using the Status drop-down list.
13. In the User Account Region, enter a name in the User Name field.
14. Select a country from the Default Country drop-down list.
15. Enter a value in the Password field.
16. Select a currency from the Default Currency drop-down list.
17. Enter a value in the Verify Password field.
18. Select the Administrator radio button to give the role of a primary user to the contact.

19. Select the Business User radio button to give the role of a business user to the contact.
20. Click **Create Contact**.
21. Click **View Profile** to view a contact's profile attributes.

10.4 Viewing My Company - Sales Team

Partner user can view Sales/Alliance team from the vendor organization managing the partnership.

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click the **Sales Team** side navigation link to view the vendor sales team working on the partner account.

10.5 Viewing My Company - Legal Contracts

Displays all the outstanding partnership contracts. The table displays (Program name, contract name, start date, end date, and status). User can view contract content by choosing the viewer icon.

Prerequisites

None

Responsibility

Partner User

Partner Administrator

VAD User

VAD Administrator

Navigation

Oracle Partners > My Company > My Organization page

Steps

1. Click the **Legal Contracts** side navigation link to view outstanding partnership contracts between partner and the vendor.

11

Opportunity

This chapter explains procedures to accept/decline and update an offered opportunity. The procedures are listed as follows:

- Section 11.1, "Accepting/Declining an Offered Opportunity"
- Section 11.2, "Updating an Active Opportunity"

11.1 Accepting/Declining an Offered Opportunity

Prerequisites

Vendor/VAD must have offered an opportunity to the partner.

Responsibility

Partner or VAD User/Administrator

Navigation

Oracle Partners > Opportunity > Opportunities page

Steps

1. Click the **Opportunity** hyperlink.

   The Opportunity Details page appears. Users can view some details of the opportunity that provide enough information to make a decision on accepting the opportunity. The page refreshes and becomes updatable if the offered opportunity is accepted.

2. Click **Accept**.to accept the opportunity.

The opportunity becomes updatable. Another option is to decline the opportunity.

3. Select a reason for declining the opportunity and click **Decline**.

   For more information on the Opportunity Tab, see the *Oracle Sales Online User Guide*.

11.2 Updating an Active Opportunity

After a partner accepts an offered opportunity, the opportunity page refreshes and enables the partner to update the opportunity.

Prerequisites

Partner must accept an Opportunity.

Responsibility

Partner or VAD User

Navigation

Oracle Partners > Opportunity > Opportunities page

Steps

1. Click the **Opportunity** hyperlink.

   The Opportunity Details page appears.

2. Enter a name in the Project Name field.
3. Fill in the total budget.
4. Fill in Vendor purchase items or supply new amounts where appropriate.

For more information on the Opportunity Tab, see the *Oracle Sales Online User Guide*.

12

Support

The Support tab enables entry into Oracle iSupport and consists of three horizontal navigation links:

- Ask Me
- View/Update Requests
- Create Request

For information on the Support horizontal navigation links, see *Oracle iSupport Concepts and Procedures Guide*.

13 Partner

This chapter contains the following sections:

- Section 13.1, "Access Privileges"
- Section 13.2, "Program Enrollment for New Partners"
- Section 13.3, "Program Enrollment for Existing Partners"

13.1 Access Privileges

Partners have certain access privileges based on their program participation. A program manager can associate "Administrator" and "Business User" responsibilities to a given program, while defining the benefits for the program.

13.1.1 Execution

Oracle Partners assigns a default responsibility through the User Management Framework to a partner when they register initially. The partner gets basic access to the partner interface and can apply to a partner program. When the partner is approved into the program, Oracle Partners replaces the partner administrator's current responsibility with the 'administrator' responsibility associated with the enrolled program (if there is one defined).

If/when partner upgrades their membership to the next level,

- Partner administrators (for that organization) responsibility associated with the current level is replaced with the 'administrator' responsibility associated with the new level (if there is one defined)
- Partner business users (for that organization) responsibility associated with the current level is replaced with the 'business user' responsibility associated with the new level (if there is one defined)

If/when partner joins another program

- Partner administrators (for that organization) are given the 'administrator' responsibility associated with the new program in addition to their current responsibility (if there is one defined)
- Partner business users (for that organization) are given the 'business user' responsibility associated with the new program in addition to their current responsibility (if there is one defined)

If/when a partner is down-graded from a program

- Partner administrators (for that organization) responsibility associated with the current level is replaced with the "administrator" responsibility associated with the new level (if there is one defined)
- Partner business users (for that organization) responsibility associated with the current level is replaced with the "business user" responsibility associated with the new level (if there is one defined)

13.2 Program Enrollment for New Partners

When partners enter a vendor website and views a banner or an advertisement of the program, they can review the benefits and make a decision to register as a partner and enroll in the program. The partner completes the online registration and enrollment application and submits. The application's qualification questions are evaluated and routed to appropriate approvers. Vendor program approvers review the application and make a decision to approve or reject the applicant for the program. An e-mail notification is sent to partners, describing program enrollment, approval, or denial. If approved, the partner is given user access to Oracle Partners and can begin utilizing the benefits of the program.

13.3 Program Enrollment for Existing Partners

A partner will receive notification of a new program from a vendor. An e-mail alert or notification is sent and the partner is asked to accept or decline program enrollment. If additional partner information is required, enrollment questions will be presented to partner. The partner can be asked to validate or update the existing profile attribute values. If the partner accepts enrollment, the profile is automatically updated with the benefits of the program.

Glossary

This appendix provides a glossary of terms used throughout this guide.

Assignment Manager

A vendor side role that has responsibility for assigning and routing opportunities to partners.

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.

Broadcast Assignment

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

Campaign

A marketing effort comprising any number of different techniques for reaching Customers or Prospects.

Channel Manager

Channel managers are the overall owners of the relationship with the partners. They support specific named partners or partners that have certain characteristics. Channel managers assist in managing and dissemination of information to and from partners.

Customer

A prior purchaser of products or services.

Descriptive flexfield

A field used to collect information unique to your business. You determine the additional information you need and Descriptive Flexfield lets you customize your application to your needs without additional programming.

Geography

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

Home

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

Horizontal Navigation Link

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

Indirect Managed Partner/IMP

Smaller partner organizations that deal with VADs to purchase and resell specific vendor items. They do not have a direct relationship with the vendor.

Interaction

A touchpoint with a customer or potential customer. Interactions may be recorded in Oracle Interaction History.

Joint Selling

In this routing option, the assignment manager offers an opportunity to multiple partners. Multiple partners can accept the opportunity and work together on it.

Link

A hyperlink to another page.

Managed Partner

An organization or person who has a strategic agreement with the vendor to conduct certain transactions and is managed directly by the vendor.

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.

Multi Org

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

Note

A note can be attached to almost any marketing object for many different purposes. Notes, once attached, cannot be deleted.

Note Type

These are organization-defined types to used to categorize notes.

Opportunity

A qualified sales opportunity with the potential to bring in revenue. An opportunity has a life span and it eventually closes either because it turns into a sale, is lost to a competitor, or is a bad opportunity. An opportunity is assigned to one or more territories based on a variety of criteria and can be worked on by a single sales representative, by a team of employees, or by a sales partner.

Owner

The owner of an object.

Page

An HTML page viewed in a browser.

Partner type

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

Partner Contact

The primary contact for a partner, (the role responsible for administering all opportunities assigned to the partner) receives e-mail notifications and accepts/declines opportunities on behalf of the partner.

Partner Timeout Period

Partner timeout is based on a partner's country; it is the time period during which a partner who has been offered an opportunity is expected to respond (accept/reject the opportunity) before the next action can occur. These time frames are user-defined and supported by Oracle Workflow through automatic e-mails, notifications, and routing status changes.

Personalize

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

Preferred Partner/VAD

The desired distributor specified by an end customer for a specific sales deal, even though the vendor can offer the deal to another partner.

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.

Prospects

Prospective customers who have not previously purchased products or services.

Record

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

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.

Structured Query Language (SQL)

Sometimes pronounced "Sequel", Structured Query Language is a standard for querying, or asking questions of, a database.

Single Assignment

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

Serial Assignment

A routing option, where an opportunity is offered successively to the partners ranked highest to lowest, until an assigned partner accepts the opportunity.

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.

Tab

Main divisions within the user interface of Oracle Partners.

TCA or Trading Community Architecture

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

Value Added Distributor (VAD)

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

Value Added Reseller (VAR)

A business partner managed by a VAD or vendor; sometimes referred to simply as a partner.

Vendor

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

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