

Oracle® Partner Management

Implementation Guide

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Oracle Partner Management Implementation Guide, Release 11*i*

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Oracle Partner Management Implementation Guide, Release 11i

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

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Preface

Welcome to the Oracle Partner Management Implementation Guide, Release 11*i*.

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

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

If you have never used Oracle Partner Management, Oracle suggests you attend one or more of the Oracle Partner Management training classes available through Oracle University.

- Oracle Self-Service Web Applications.

To learn more about Oracle Self-Service Web Applications, read the *Oracle Self-Service Web Applications Implementation Manual*.

- 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

The Oracle Partner Management Implementation Guide contains the information you need to understand and use Oracle Partner Management. This guide contains thirteen chapters:

- [Chapter 1](#) provides a brief introduction to Oracle Partner Management and highlights the key features and new features of Oracle Partner Management.

- [Chapter 2](#) provides an overview of what you need to have installed and implemented before implementing Oracle Partner Management.
- [Chapter 3](#) describes user types, responsibilities and the transactional system that users can access depending on responsibilities.
- [Chapter 4](#) describes attributes, attribute categories, and seeded categories that enable vendors to segment their partners.
- [Chapter 5](#) describes setups required for the partner dashboard functionality.
- [Chapter 6](#) describes setups required for the channel manager dashboard functionality.
- [Chapter 7](#) describes setups required for the programs functionality.
- [Chapter 8](#) describes setups required for the enrollments functionality.
- [Chapter 9](#) describes how to route an opportunity to a partner.
- [Chapter 10](#) describes setups required for the referral functionality.
- [Chapter 11](#) describes setups required for the deal registration functionality.
- [Chapter 12](#) describes setups required for the special pricing functionality.
- [Chapter 13](#) describes setups required for the fund request functionality.

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 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/>.

Other Information Sources

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

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).

- **PDF Documentation**- See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on *OracleMetaLink* and is updated frequently.
- **Online Help** - You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.
- **11i Release Content Document** - Refer to the Release Content Document for new features listed release. The Release Content Document is available on *OracleMetaLink*.
- **About document** - Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on *OracleMetaLink*.

Related Guides

Oracle Partner Management shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Partner Management.

You can read the guides 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>.

Guides 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). 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.

Guides Related to This Product

Oracle Partner Management Partner and Vendor User Guide

These guides contain information on various functions that vendors and partners can perform.

Oracle Field Sales Implementation Guide

This guide contains information on how to enable the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

Oracle Approval Management (AME) Implementation Guide

This guide contains information on how approvers are set up for enrollment requests, referrals, deals, fund requests and special pricing.

Oracle iStore Implementation Guide

Partners can navigate into Oracle Partner Management through the partner dashboard. The partner dashboard is set up by configuring sites. Oracle Partner Management is integrated with Oracle iStore to provide a partner dashboard in the Oracle iStore Customer UI.

This guide contains information on how to configure sites.

Oracle Trade Management Implementation Guide

This guide contains information on how to set up budgets, offers, and claims.

Oracle Marketing Implementation Guide

While searching for partners, partners are displayed based on your search criteria. You can save your search as a list and associate this list with a marketing campaign or a promotion. Oracle Partner Management integrates with Oracle Marketing to enable you to generate partner lists. These lists can then be used to run marketing campaigns and events thereby enabling marketing to partners.

You can view details of the list only if you have the appropriate 'Audience Workbench' permission.

This guide contains information on how to set up lists and marketing campaigns.

Oracle Leads Management Implementation and Administration Guide

This guide contains information on how to set up the rules engine to process leads.

Oracle Content Management Implementation Guide

This guide contains information on how to set up content that appears as the program summary.

Oracle Quoting Implementation Guide

This guide contains information on how to create quotes using modifiable templates, add and configure complex products, and perform real-time global availability checks. Users can accept product trade-ins, assign sales credits, and manually adjust prices.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains procedures for using the Web Applications Dictionary.

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 and the Oracle 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 guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

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.

“About” Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the “About” document for your product. “About” documents are available on *OracleMetaLink* for most products starting with Release 11.5.8.

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, screen shots, 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 and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual

also provides information to help you build your custom Oracle Forms Developer forms so that the forms 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

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11*i*. It includes new features, enhancements, and changes made to database objects, profile options, and seed data for this interval.

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Partner Management implementation team, as well as for users responsible

for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Partner Management and reach full productivity quickly. These courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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 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 Partner Management 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 Oracle server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 OracleMetaLink, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (<http://metalink.oracle.com>).

Alerts: You should check OracleMetaLink 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 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.

Introduction

This chapter provides information on the key features of Oracle Partner Management. Topics included are:

- [Section 1.1, "Oracle Partner Management Overview"](#)
- [Section 1.2, "What's New in this Release"](#)
- [Section 1.3, "Implementation Flow"](#)

1.1 Oracle Partner Management Overview

The majority of Global 5000 businesses generate over fifty percent of their revenue through indirect sales channels and have a strong need for a functionally rich and fully integrated Oracle Partner Management solution. Oracle Partner Management fills this need by enabling vendors to efficiently and effectively manage business with their indirect channel partners resulting in more successful and lucrative channel partnerships. Oracle Partner Management streamlines and strengthens the entire partner lifecycle enabling companies to better recruit new partners, to more efficiently manage existing partnerships, to more effectively market to and through partners, to sell more with partners and to measure the performance of partnerships. Oracle Partner Management is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

With this release, partners can:

- refer business to the vendor and get compensated.
- register deals with the vendor to avoid competition on a sale.
- request special, discounted pricing from a vendor to respond to competitive selling situations.
- request for funds to carry out marketing activities.

1.2 What's New in this Release

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 MetaLink for relevant product patches and documentation.

The following features are added in this release:

- [Setting Up the Partner Dashboard](#)
- [Setting Up the Channel Manager Dashboard](#)
- [Setting Up Referral Management](#)
- [Setting Up Deal Registration](#)
- [Setting Up Special Pricing Management](#)

- [Setting Up Partner Funds Management](#)

1.2.1 Enhancements to Existing Functionality

The programs, enrollments, and profile attribute features are enhanced.

Programs and Enrollment

The following are enhancements for the Programs and Enrollment functionality.

- **Distributor Initiated Invitation** - Distributors can invite their managed partners or resellers to join programs.
- **Renewal Process** - The program renewal process has been enhanced and partners can now renew their memberships into multiple programs. If the partner chooses to renew multiple memberships at one time, the system presents a consolidated questionnaire to seamlessly collect the profile information, summary of all applicable terms and conditions, and consolidated payment information.
- **Benefits Framework** - Oracle Partner Management extends benefits to partners based on their program participation. The benefits framework is tightly integrated with various Oracle E-business suite applications such as Oracle Trade Management, Oracle Marketing, and Oracle Sales to enable the partner to refer business, register deals, request for discounts, funds and place orders.
- **Proforma Invoice** - This provides a user friendly view of program fees and taxes during self-service enrollment process. Partners can now view a proforma invoice inclusive of local taxes, during the enrollment process.
- **Program Copy** - Channel managers can copy existing program definitions and make modifications. Channel Managers can select attributes of the original program that should to be copied into the newly created one.
- **Program Prerequisites** - Most companies require their partners to meet certain prerequisites before they can enroll into programs. Vendors can define prerequisites that a partner must meet to be eligible to enroll in a program.
- **Global/Subsidiary Member Types** - Vendors can now manage partners with subsidiary organizations. Subsidiary partners can enroll into programs under their global partner's membership. The vendors can specify different contractual and payment terms for global partners and their subsidiaries.

Partner Attributes

Vendors can define 'derived' attributes with the 'Currency', 'Date', and 'List of Values' return types. They can define time intervals to refresh these attributes. They can also specify a possible list of values for the LOV derived attribute type.

New derived attributes have been seeded to track partner performance.

1.3 Implementation Flow

The implementation flow is an abstract of the detailed flow that follows in the rest of the guide.

- [Setting Up Profile Attributes](#)
- [Setting Up the Partner Dashboard](#)
- [Setting Up the Channel Manager Dashboard](#)
- [Setting Up Programs](#)
- [Setting Up Enrollments](#)
- [Setting Up Opportunity Assignment](#)
- [Setting Up Referral Management](#)
- [Setting Up Deal Registration](#)
- [Setting Up Special Pricing Management](#)
- [Setting Up Partner Funds Management](#)

Setting Up Profile Attributes

Attributes provide important characteristic information on Oracle Partner Management business entities (partners, partner contacts, leads, opportunities, referrals and deal registrations) and helps companies increase knowledge of their partner's demographics, contacts and capabilities, such as, who they are, what they sell, where they sell, what industries they focus on, what certifications they have, and so on. Thus, attributes are set up to capture additional specific business information for a given business entity within Oracle Partner Management.

To effectively manage partners and partner contacts, vendors need to collect an extended partner and contact profile. They can collect the profile information during the registration and enrollment process. The profile information can also be updated by the partner and the channel manager and in some cases may require validation.

Oracle Partner Management provides an extensible framework to manually or automatically capture any kind of information about partners, including performance measures and data derived from external sources. After they have defined attributes, vendors or partners can enter profile information while enrolling into programs. The framework supports fixed attributes (information entered by the partner or channel manager) and derived attributes. (information calculated based on partner data and transactions) Channel managers can use this information to differentiate partners and provide better services, such as soft funds, incentives, and opportunities.

Setting Up the Partner Dashboard

The partner dashboard is the single entry point for all partners into your system. Using the dashboard, partners can:

- Enroll into partner programs.
- Manage their memberships including upgrades and renewals.
- Access partners stores, browse the catalog and place orders using the store.
- Accept and manage assigned sales opportunities, create quotes and place orders.
- Submit referrals, register deals, request for funds, request for special pricing requests.
- Maintain their organization and contact profiles.
- View notifications.
- Access targeted content such as product news, training information, FAQs and so on.
- Distributors can view their managed partners profile information and invite new partners to join the vendor's partner programs.

The partner dashboard displays a summary of transactions and partners can navigate from the dashboard to the transactional system. The list of transactions available depends on the partner's enrollments and role. For example, an authorized reseller might be assigned sales opportunities.

The key features are:

- Configurable User Interface - Oracle Partner Management leverages Oracle iStore's template management framework to deploy the dashboard. The template management framework enables you to configure the layout of the dashboard. You can target partner promotions on the dashboard and deliver

partner specific content on the dashboard. You can deploy multiple partner portals to target different partner segments.

- Quick Links Bin - This bin enables partners to access the transactional system.
- Enhanced enrollment system - Oracle Partner Management leverages the Oracle iStore site and template manager framework to deliver a fully configurable user interface for the enrollment flow.
- Self service registration for partner organizations - Oracle Partner Management enables self service registration for new partners. Partners are guided through a step-by-step registration and enrollment flow.
- Self-service registration for partner users - Oracle Partner Management allows partner users of existing partner organizations to request for an account via self-service. Such requests are routed to partner administrators for approval.

Setting Up the Channel Manager Dashboard

The channel manager dashboard provides vendors an easy to use, configurable user interface to help them with their day to day responsibilities. It provides them with a 360 degree view of their partners and activities, thereby enabling them to make informed decisions.

The key features of the dashboard are:

- Dashboard User Interface (UI) - The dashboard UI includes a Key Metrics bin, Charts and Graphs indicating the sales performance of partners, Quick Links bin, and saved search results where vendors can personalize their search and save it. They can personalize the view of the dashboard and thus make it more efficient for their needs.
- Key Metrics bin - This bin provides a consolidated view of partners. The key metrics have been seeded (as derived attributes) and vendors can view attributes, how they relate to partners and make informed decisions. Vendors can also customize the key metrics view by enabling different attributes.
- Partner Query tool - Vendors can perform advanced searches based on profile attributes. They can customize the criteria by adding or removing search attributes to tailor their search. Oracle Partner Management integrates with Oracle Marketing to enable them to generate partner lists. These lists can then be used to run marketing campaigns and events thereby enabling marketing to partners.
- Territory based security model - This release provides a territory based security model to access partner information. When a partner is created, the system

automatically identifies the channel manager(s) to be assigned based on the territory definition. Vendors can define territories and specify territory qualifiers, such as geography, partner type and so on. For example, territory A could mean all the states in the East Coast of the U.S. that have global partners (global membership type). While defining a territory, vendors can also specify the channel manager responsible for that territory. If for example, a territory (Dallas) has Greg defined as the channel manager. If the newly created partner (NP) is from Dallas, Greg is automatically assigned to NP as the channel manager by the system. Vendors can also manually assign users to partner organizations thereby bypassing the territory definition. Users with the 'Super User' role can access all partners irrespective of the territory definition.

- Partner Lists - Oracle Partner Management integrates with Oracle Marketing to enable vendors to generate partner lists that can be used to run marketing campaigns and events.

Setting Up Programs

Programs are used to segment partners and provide them with different benefits. Vendors can create programs for existing partners as well as new partners. Vendors can also recruit and maintain partners with specific incentive packages. This helps increase and maintain a strong partner community that further helps them to increase overall market share and revenues.

This chapter provides information on setups required to create programs, program related profiles, concurrent programs, lookups, administration and security access required to access programs.

Setting Up Enrollments

Programs are created and pushed out to partners via the Available Programs bin in the partner dashboard. Partners can drill into details of a program. Once partners initiate the enrollment process, they are guided through a series of steps to provide more information.

This chapter provides information on enrollment related profiles, how to set up enrollment approvers, concurrent programs, lookups, and security required for program approvals.

Setting Up Opportunity Assignment

A sales opportunity is a qualified sales opportunity. When an opportunity is created, it is assigned to one or more sales representatives based on territory definitions. New opportunities can originate from leads, marketing campaigns or

can be manually entered. Sales representatives or channel managers can assign opportunities to partners.

An opportunity can be assigned to your direct or indirect sales channel.

- Sales representatives from your organization can fulfill direct opportunities.
- You can route indirect opportunities to partners for fulfillment.

While routing an opportunity to a partner, you must be able to identify the most appropriate partner based on pre-defined rules or you can manually search for a partner based on their skills and expertise.

When you assign an opportunity to partner, the partner can view details and accept it. At any time, the partner can also abandon the opportunity.

Automatic Partner Assignment

Oracle Partner Management provides an engine to identify the best partner(s) to fulfill each indirect opportunity by matching opportunity attributes with partner expertise. The engine operates on a schedule to assign indirect opportunities to partner(s). Once the engine identifies the best partner(s), the system starts a workflow process to notify the channel manager, require their approval, and notify partner contacts once the opportunity is offered to the partner.

Automatic Partner Search

Once matching rules are defined in the system, you can manually invoke the engine to find the best partner for fulfilling the opportunity. Once you submit the assignment to a partner, the system starts a workflow process to notify the partner and the channel manager that an opportunity is assigned.

Manual Partner Search

You can manually match opportunities by selecting a preferred partner or performing a manual search using partner profile attributes to identify the best partner. After you identify the best partner, you can submit the assignment. A workflow process drives approvals and notifications for channel manager and partner users.

The key features are:

- Rule based engine automatically processes leads and assigns opportunities to partners based on opportunity criteria and partner profile.
- Workflow based approval and notifications.

- Multiple routing types allows to assign opportunity to one or multiple partners, using serial, parallel or joint routing.
- Ability to manually search for partners based on their profile

Setting Up Referral Management

Referral Management enables partners to refer business opportunities, that they cannot fulfill directly, to your organization. For example, the partner learns of an opportunity for a customer who is interested in a product that the reseller does not sell. In this scenario, partners can submit a referral to the vendor and receive a percentage of the revenue.

When partners submit a referral, it is routed to the appropriate approver(s). Approvers are notified of the referral and they review it and approve, reassign or decline it. When the referral is approved, the partner is compensated after the customer places an order. The commission is reviewed and approved internally and then sent to the partner for acceptance. After partners accept the commission, the vendor pays the commission.

Vendors and partners receive notifications about referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by vendors and sent when the status changes, for example, when a referral is approved.

Vendors and partners can access a summary list of referrals that they have access to. They can build personal views to quickly find referrals that they are most interested in.

The key features are:

- Partners can submit referrals online and track the progress of the referral from submission to acceptance to payment.
- Configurable questionnaire to collect relevant information about a potential opportunity.
- Workflow driven approvals and notifications - You can assign approvers based on multiple criteria, such as geography, product lines or partner types. Oracle Workflow is configured to send notifications to relevant people, at each step of the referral life cycle.
- Flexible setups - Program managers can setup referral initiatives based on geography and/or product lines. Users can define different commission rates based on product lines.

- Channel Managers and Registration Managers can review submitted referrals, check for duplicates and approve or decline it.
- Integration with TCA to verify and merge customer and contact information and maintain the integrity of your customer database.
- Integration with Oracle Sales to automatically carry over referral information to the opportunity or lead record and through the sales cycle.
- Integration with Oracle Trade Management to automate referral commission calculation and payment.

This chapter provides information on profiles, concurrent programs, lookups, security access required to access referrals, and dependencies.

Setting Up Deal Registration

When partners resell your products, there is often a conflict between your direct sales force and your partner network. Deal Registration enables partners to submit opportunities and receive your commitment not to compete directly and provide support on the deal. You increase partner loyalty and gain visibility into partner activity.

When partners submit a deal registration, it is routed to the appropriate approver(s). Approvers are notified of the deal registration and they review it and approve, reassign or decline it. When the deal registration is approved, a new opportunity is created in the system and assigned to the partners' organization for fulfillment.

Vendors and partners receive notifications about deal registration activity and can navigate directly from the notification into the associated deal registration. Notifications are configured by the vendor and sent when the status changes, for example, when a deal registration is approved.

Vendors and partners can access a summary list of deal registrations that they have access to. Vendors and partners can build personal views to quickly find deal registrations that they are most interested in.

The key features are:

- Partners can submit deal registrations online. Once the registration is approved, the partner can work on the indirect opportunity record that is automatically generated and assigned to the partner.
- Workflow driven approvals and notifications - You can assign approvers based on multiple criteria, such as geography, product lines or partner types. Oracle

Workflow is configured to send notifications to relevant people, at each step of the deal life cycle.

- Flexible setups - Program managers can setup deal initiatives based on geography and/or product lines.
- Channel Managers and Registration Managers can review registered deals, validate information, check for duplicate deals, and approve or decline it.
- Integration with TCA to verify and merge customer and contact information and maintain the integrity of your customer database.
- Integration with Oracle Sales to automatically carry over deal information to the opportunity record and through the sales cycle.

Setting Up Special Pricing Management

Special Pricing Management streamlines the submission, approval and tracking of special pricing requests as well as the submission, validation and tracking of claims.

Special Pricing Management enables you to automate and streamline the special pricing process in which your partners request discounts on sales deals. You can respond quickly and intelligently to your partners' requests for special, discounted pricing, thus closing more sales and increasing partner loyalty.

When a partner submits a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve or decline it. When a request is approved and the partner closes a sale, he/she can submit a claim to receive the discount you approved. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, you can make the payment to the partner as credit or can issue a check. Partners can also check the status of claims online.

Special Pricing provides search capabilities that enables users to locate requests or perform analysis on special pricing activity. You can configure Oracle Workflow to organize the approval process for incoming requests including any number of levels of approvers.

You can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of important special pricing activity they should be aware of. You can access a summary list of all the special pricing requests that you have access to in the system, build personal views to quickly find the special pricing requests that you are most interested in.

The key features are:

- Partners can request special pricing, view the status of their special pricing request, and submit claims.
- You can request special pricing on behalf of a partner.
- You can review special pricing information and while approving a special pricing request, you can identify similar requests and link them.
- You can automatically accrue liabilities on the maximum amount requested for similar requests. (optional)
- You can gather competitive information for products. (Marketing)
- You can create claims and see outstanding special pricing requests.

This chapter provides information on profiles, concurrent programs, lookups, and dependencies.

Setting Up Partner Funds Management

Partner Funds Management streamlines the submission, approval and tracking of fund requests as well as the submission, validating and tracking of claims. It enables you to better manage and distribute channel marketing funds to your channel partners. With a centralized marketing budgeting and claims management system, including a partner self-service interface to submit fund requests and claims, you can share channel marketing funds with your channel partners to motivate them, build loyalty and financially assist them with marketing activities that will further drive your sales. By assisting partners financially, a partner remains motivated and this helps in building loyalty as well. You can provide funds for a specific time period and base it on fiscal periods of your organization.

When a partner submits a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve, decline, or return the request. When a request is approved and the partner executes the marketing activity, he/she can submit a claim to redeem money from you. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, you can make the payment to the partner as credit or can issue a check. The system enables you to measure the effectiveness of your channel marketing expenditures by capturing expected performance on incoming requests and actual performance on the claims.

Partner Funds Management provides search capabilities that enables you to locate requests or perform analysis on marketing activity. You can configure Oracle

Workflow to organize the approval process for incoming requests including any number of levels of approvers.

You can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of. You can access a summary list of all the fund requests that you have access to in the system, build personal views to quickly find the fund requests that you are most interested in, based on attributes like status or marketing activity.

You can set up a program benefit that enables partners enrolled in that program to request channel marketing funds.

The key features are:

- Partners can request funds, review fund information, view fund status, submit collateral for approval, and submit claims.
- Vendors can attach funds to partner programs, submit fund requests on behalf of a partner.
- Vendors can define standard processes and for each activity type, they can define objectives, expense breakdown, approvals, and approvers.
- Vendors can also create claims.

This chapter provides information on profiles, concurrent programs, lookups, geography and dependencies.

Mandatory Dependencies and Integrations

This chapter provides an overview of mandatory dependencies and integrations needed to implement Oracle Partner Management. Topics included are:

- [Section 2.1, "Oracle E-business Suite Prerequisite Setup Overview"](#)
- [Section 2.2, "Mandatory Dependencies"](#)
- [Section 2.4, "Integrations"](#)

2.1 Oracle E-business Suite Prerequisite Setup Overview

Oracle Partner Management has various prerequisite setups that range from supplying an underlying structure for Oracle Partner Management to those that extend its functionality and capabilities.

2.2 Mandatory Dependencies

Implementing these dependencies is required and must be complete before beginning an Oracle Partner Management implementation. For example, the Oracle Trading Community Architecture (TCA) provides a repository for customer and partner information. All customer and partner information used by Oracle Partner Management is stored in the TCA tables. Because this information is critical for Oracle Partner Management, TCA is a mandatory dependency, and must be setup properly.

The applications listed as mandatory must be setup prior to implementing Oracle Partner Management. Setups are generally partial and limited to basic functions that are specifically needed for Oracle Partner Management.

- [Section 2.2.1, "Oracle CRM Technology Foundation"](#)
- [Section 2.2.2, "Setting Up Application Object Library"](#)
- [Section 2.2.3, "Setting Up General Ledger"](#)
- [Section 2.2.4, "Setting Up Oracle Human Resources"](#)
- [Section 2.2.5, "Setting Up Oracle Inventory"](#)
- [Section 2.2.6, "Setting Up Product Lifecycle Management"](#)
- [Section 2.2.7, "Setting Up Oracle Receivables"](#)

2.2.1 Oracle CRM Technology Foundation

Oracle CRM Technology Foundation provides a common infrastructure on which all CRM applications are built. By providing a set of application components, CRM Foundation ensures that all applications interact with key business objects in a consistent manner.

For more information about setting up CRM Foundation for Oracle Partner Management see:

- [Section 2.2.1.1, "Resource Manager"](#)
- [Section 2.2.1.2, "Task Manager"](#)

- [Section 2.2.1.3, "1-to-1 Fulfillment"](#)
- [Section 2.2.1.4, "Notes and Note Types"](#)
- [Section 2.2.1.5, "Territory Manager"](#)
- [Section 2.2.1.6, "Assignment Manager"](#)

For detailed information about Oracle CRM Foundation see, *Oracle CRM Application Foundation Implementation Guide*.

2.2.1.1 Resource Manager

Resource Manager is mandatory for an Oracle Partner Management implementation. This component enables you to use application resources regardless of where they are created. Acting as a central repository - various types of resources, groups, teams, and roles can be created.

You can import resources such as employees, suppliers, parties, or partners, created in other applications. Once imported, the resource becomes available for other applications to use.

Resource Manager enables Groups, Roles, Role Types and Employee Import.

2.2.1.2 Task Manager

Task Manager is mandatory for an Oracle Partner Management implementation. It provides a mechanism for your application to respond to customer needs in a timely manner. Using Task Manager you can create, assign, manage, sort, and prioritize tasks. If implementing task transition rules, after defining a rule and assigning it an appropriate responsibility, set the following profile:

Task Manager: Default Task Status

If no rules are assigned to a responsibility, all statuses are displayed in the Status LOV. In this case, the Task Manager: Default Task Status does not need to be set.

2.2.1.3 1-to-1 Fulfillment

If you are using email, fax, print schedules, email notifications (or if you are using the features of email notifications on fulfillment rules) Oracle 1-to-1 Fulfillment is a mandatory setup. The fulfillment engine supports high volume electronic fulfillment of documents.

- When implementing 1-to-1 Fulfillment the following conditions must be met: Fulfillment Server is created: A Fulfillment Server is an instance of the request processing software.

- Fulfillment Group is created: Fulfillment group is used to group agents (users) together.
- JFT Fulfillment Admin role is assigned to the Implementor: This role gives access to the Fulfillment administration console for setting up fulfillment, creating master documents and viewing request history. This role and responsibility only needs to be assigned to a Marketing user only if he/she will also be administering the Fulfillment activities (for example, setting up Fulfillment servers, agents, etc.). Typically, only a Marketing Administrator is involved in these activities.
- AMS: Enable Fulfillment is set to Yes.

2.2.1.4 Notes and Note Types

A complete notes implementation is optional. But some note functionality has to be set up to use Oracle Partner Management. This module is used to create, maintain, and share notes related to customers, opportunities, service requests, and other business objects.

Setting up note types is optional. Although Oracle Notes comes with a set of predefined note types, you can create customized note types. When using Oracle Partner Management, both the predefined set of notes and the customized notes are available. Refer to the Implementing notes section of the Oracle CRM Foundation Implementation Guide for additional information.

To create customized note types, use the following procedure:

Prerequisites

None.

Steps

1. Log into Oracle Forms with CRM Administrator responsibility and navigate to Notes Setup> Note Type Setup.

The Application Object Library: Note Types Lookups form opens.

2. Define a Lookup code and meaning.
3. Describe the Note Type meaning.

It is this description that will later be used to map the Note Type to the Marketing Object.

4. Add a short description and in the tag column enter a note.

5. Save your work.
6. To associate the Note Type with specific marketing objects, use the following procedure:
 - a. Navigate to Notes Setups > Source and Note Type Mappings.
 - b. Using the Source Object LOV, select the appropriate Marketing Object that will use this Note Type. For example, Campaign Schedule.
 - c. Using the Note Type LOV, select the new Note Type created. The Note Type LOV will display the text entered as the Note Type meaning.
 - d. Select an End Date for the Note Type Mapping.
 - e. Using the Application LOV, select Oracle Partner Management.
 - f. Save your work.

Note: If a note type is not associated with a specific marketing object, it becomes available to all marketing objects.

2.2.1.5 Territory Manager

Territory Manager is required for the channel manager dashboard since channel managers are assigned based on territories. Territory Manager is also required for referrals as claims are assigned based on territory definitions. It is also needed for opportunities and leads.

Territory Manager provides an infrastructure to define territories based on flexible criteria, such as geography, zip code, area code. This engine creates automatic assignment of transactions across the entire CRM suite.

For example, leads and opportunities are routed through this engine to the appropriate sales professionals.

2.2.1.6 Assignment Manager

Implementing Assignment Manager is optional. The Assignment engine determines the best resource to be assigned to tasks based on availability and skill set. This engine is used by the various CRM modules to automatically assign tasks to a resource or a group of people.

2.2.2 Setting Up Application Object Library

Oracle Applications Object Library (AOL) 11i enables a multiple language and currency setup for the Oracle Partner Management implementation. After being enabled, you can determine the set of languages and currencies to be used.

For more information see, *Oracle Applications Concepts* and *Oracle Applications System Administrator's Guide*.

2.2.3 Setting Up General Ledger

Basic accounting information for Oracle Partner Management is provided by Oracle General Ledger (GL). Because Oracle Inventory requires at least one organization and associated set of books, at least one business unit must be created in GL.

For specific setup information see, *Oracle General Ledger User Guide*.

2.2.4 Setting Up Oracle Human Resources

Oracle Human Resources Management System (HRMS) stores information related to your organization. For an Oracle Marketing implementation, the following HRMS setups must be performed:

- [Section 2.2.4.1, "Determining the HRMS Navigation Path"](#)
- [Section 2.2.4.2, "Creating Lookup Values for Organization Type"](#)
- [Section 2.2.4.3, "Creating Locations"](#)
- [Section 2.2.4.4, "Creating Business Groups"](#)
- [Section 2.2.4.5, "Creating Organizations"](#)
- [Section 2.2.4.6, "Assigning Security Profile"](#)
- [Section 2.2.4.7, "Adding a Legal Entity, Operating Unit and HR Organization"](#)
- [Section 2.2.4.8, "Creating A Business Unit"](#)
- [Section 2.2.4.9, "Assigning Multi Org Responsibilities"](#)

For information on how to perform these tasks, see *Using Oracle HRMS - The Fundamentals*.

2.2.4.1 Determining the HRMS Navigation Path

The responsibilities and navigation paths for performing HRMS tasks is different depending on the terms of your license (shared vs. full).

- **Shared HRMS license:** Create employees using CRM Foundation.
 - Responsibility: CRM Administrator
 - Navigation Path: CRM Foundation > Resource Manager > Maintain Employees > Employees
- **Full HRMS license:** Create employees using HRMS.
 - Responsibility: HRMS Manager
 - Navigation Path: People > Enter and Maintain

2.2.4.2 Creating Lookup Values for Organization Type

In this step you are creating sub organization types. For example, if the organization is divided into business groups, then create an organization type called Business Group.

This procedure adds values for a specific lookup “Organization Types (ORG_TYPE)”. If the organization is divided into subsidiaries, create an organization type called Subsidiary.

2.2.4.3 Creating Locations

In Oracle HRMS, you will set up each physical site where your employees work as a separate location. You can set up:

- Global locations: Available in all Business Groups.
- Business Group locations: Available in one Business Group.

Similarly, you enter the addresses of external organizations that you want to maintain in your system, such as employment agencies, tax authorities, and insurance or benefits carriers. When setting up internal or external organizations, you select from a list of these locations.

2.2.4.4 Creating Business Groups

The business group is the largest organizational unit representing the enterprise. A Business Group may correspond to a company or corporation, or in large enterprises, a holding or parent company. It can be an organization with a physical location, or it may be an abstract representation of a legal entity that employs people assigned to work in organizations beneath it.

A default business organization has been set up for you, therefore this step is not required for Oracle Partner Management to be fully operational. However, you

must set up an organization if you plan to use any financial ERP applications in the future.

2.2.4.5 Creating Organizations

The first organization to set up is the Business Group, all other organizations will fall below (will belong to) it. Below the Business Group, you represent the groupings in which employees work, such as branches, departments or sections, by means of internal organizations. To enable the assignment of employees to an internal organization, you classify it as an HR Organization.

2.2.4.6 Assigning Security Profile

In this step, you will be defining the security level for specific Partner Responsibilities. To do this, use the profile HR: Security Profile. This profile enables access (based on responsibility) to a single business group.

To assign the security profile use the following procedure:

Prerequisites

None.

Steps

1. Log into Oracle Forms with the System Administrator responsibility and navigate to Profile > System.

The Find System Profile Values window opens.

2. In the Application field enter Oracle Partner Management.
3. In the Responsibility field search and select the responsibility for which the profile is being set.
4. In the Profile field enter HR: Security%.
5. In the HR: Security Profile, at Site level, select an organization.

The organization selected is the business group that users will have access to. They will have access only to records within this business group.

6. Save your work.

Validate that the setting for HR: Business Group is the same organization as the HR: Security profile.

2.2.4.7 Adding a Legal Entity, Operating Unit and HR Organization

To perform the HRMS task of creating a Legal Entity, Operating Unit, and Organization, follow the procedure below:

Prerequisite

Set of Books.

Steps

1. Log into Oracle Forms with the appropriate HRMS Manager responsibility and navigate to Work Structure > Organization > Description.
The Find Organization form opens.
2. Search and select your organization.
3. Place your cursor in the Organization Classification Name field.
4. Using the LOV select GRE/Legal Entity.
5. Select the Enabled radio button.
6. Save your work and close this form (the Organization form will still be open in the background).
7. Select Others.
8. Select GRE / Legal Entity.
9. Select a Set of Books (defined above).
10. Click **OK**.
11. Save your work.
12. Add an Operating Unit:
 - a. Under Organization Classifications Name, add Operating Unit.
 - b. Click the ellipsis to select a classification.
 - c. Select a Legal Entity.
 - d. Click Others.
 - e. Select Legal Entity Accounting.
 - f. Select a set of books.
 - g. Click **OK**.

- #### 2.2.4.8 Creating A Business Unit

1. Log into Oracle with the appropriate HRMS responsibility and navigate to Work Structure > Organization > Description.
2. Select New.
3. Fill in Name of Business Unit.
4. Select Type (Business Unit).
5. Select a Location.
6. Select an Organization Classification.
7. Select Internal or External.
8. Save your work.

2.2.4.9 Assigning Multi Org Responsibilities

You can assign Multi Org related profiles to a selected Oracle Partner Management responsibility. For example, MO: Operating Unit profile. This displays the appropriate Business Unit when using that responsibility.

2.2.5 Setting Up Oracle Inventory

Oracle Inventory serves as the repository for items that can be used in Oracle Partner Management. Use Oracle Inventory to create new products or collateral. After creating new inventory products or items you can add them to a Marketing Campaign or Event. Products or items stored in Oracle Inventory reside in the `MTL_SYSTEM_ITEMS` table.

Oracle Inventory requires one inventory organization to be identified. Typically this is the Master Inventory Organization. In a multiple operating unit environment, the Master Inventory Organization should consist of all the products from all the operating units, it serves as the highest organizational level.

If you need to separate products (sold from each operating unit) into different inventory organizations, create a separate inventory organization for each operating unit. These operating units should exist only as subsets of the Master Inventory Organization.

Implement Oracle Inventory as described in the Oracle Inventory Implementation Guide.

2.2.6 Setting Up Product Lifecycle Management

Oracle Partner Management derives its product data using the product catalog provided by Product Lifecycle Management (PLM). PLM provides a product hierarchy located in the OLTP schemas. This hierarchy is maintained by the user in a Product Catalog and is expanded to a de-normalized table (designed for efficient traversal) by the Sales and Marketing applications.

For information on defining product categories, see *Oracle Advanced Product Catalog User Guide*.

2.2.7 Setting Up Oracle Receivables

Oracle Partner Management uses Oracle Receivables to record customer information. Customer registration information is maintained in the Trading Community Architecture (TCA). TCA stores all customer, partner, prospect, and other customer related information in a single repository. This enables consistent message delivery across all channels.

At a minimum, you need to perform the required Oracle Receivables setups, defining system options including tax options and address validation, as described the *Oracle Receivables User Guide*.

2.3 Creating the Implementation User

Each user (or type of user) has a specific collection of responsibilities. Before assigning responsibilities to a user, the employee must be created in HRMS. After the employee has been created, you can create the user and assign responsibilities and a default application ID.

To create marketing users, see the following:

- [Section 2.3.1, "Creating the Employee"](#)
- [Section 2.3.2, "Defining a User by Adding Responsibilities"](#)
- [Section 2.3.3, "Importing the Employee"](#)

2.3.1 Creating the Employee

The first step in creating a user is creating the employee in HRMS.

Prerequisites

None.

Steps

1. Log into Oracle Forms with the HRMS Manager Responsibility and navigate to People > Enter & Maintain.
2. In the Find Person box, select New.
3. Enter relevant information and save your work.
A confirmation appears in the window.
4. Select Assignment and enter values in the Organization, Team/Group, Location, and Supervisor fields.
If a dialog box with Update and Correction buttons is displayed, select Correction to revise existing data and Update to create a new record.
5. Save your work.
A confirmation appears in the window.
6. Select Yes to use the new location.
7. Save your work.

2.3.2 Defining a User by Adding Responsibilities

After creating the employee in HRMS, you can create an user account for the employee and add responsibilities to it.

Based on your functional requirements, add one or more of the following responsibilities to your user.

Prerequisites

Employee is created

Steps

1. Log into Oracle Forms with the System Administrator responsibility and navigate to Security > User > Define.
The Users window opens.
2. In the User Name field, enter a name. Also enter password and choose the employee.
3. In the Responsibilities block, assign the appropriate responsibilities to the Implementation User.
4. Save your work.

2.3.3 Importing the Employee

Use the following procedure to import the employee as a resource.

Prerequisites

Employee should exist.

Steps

1. Log into Oracle Forms with the CRM Administrator responsibility and navigate to Resource Manager > Maintain Resources > Import Resources.
2. Locate the employee.
3. Enter employee's name in the name fields.
4. Select Search.
5. Select **Create Resource**.
6. Click **OK** to accept default values.

- 7. Click **Save Resource** (record the transaction number).

2.4 Integrations

Table 2–1 describes the integration flow of Oracle Partner Management with other products.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Programs	Oracle Content Manager	When a vendor creates programs, he/she can create a summary of the program which reflects details of a program. The summary is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. The summary can be the setup type, name, program start and end dates, owner, partner type, country, language, and description. Program summary can be set up by navigating to the enrollment questionnaire and clicking on the Program Overview button.
Programs	Oracle Contracts	When partners enroll into a program, they might be expected to sign a contract. Global partners can be presented with contracts that differ from contracts presented to standard partners. Multiple contracts can be associated to a program. The contracts are tied to the member type. Oracle Partner Management leverages the Oracle Contracts Core functionality to create and attach one or more contract templates to each program.
Program Approval	Oracle Marketing	For a program to be active, it needs to be approved. Approvers are set up using program types. When a user creates a program with a 'program type' and submits it for approval, a notification is sent to the approver associated with the program type. A sequence can be associated with approvers to route approval requests sequentially. The Oracle Marketing Framework (AMS: Generic Approval Framework) is used to route approval requests, notifications, and get approvals.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Programs	Oracle Advanced Pricing	When partners enroll into a program, they are charged a price or a fee. Price lists are created in Oracle Advanced Pricing or Oracle Order Management based on the profile value 'QP: Source System Code' set in Oracle Partner Management at the application level. The value needs to be 'Oracle Pricing'. Multiple prices can be defined by associating a program with multiple price lists. If multiple price lists are associated, vendors need to define precedence so that the appropriate price is selected. The multi-currency feature of Oracle Advanced Pricing enables price lists to select the appropriate price.
Programs	Oracle Order Management	If a program is priced and a partner enrolls in it, a sales order is created using Oracle Order Management. Also, price lists are created in Oracle Advanced Pricing or Oracle Order Management based on the profile value 'QP: Source System Code' set in Oracle Partner Management at the application level.
Programs	Oracle Inventory	To support order creation, the program needs to be present as inventory item. So, when a program is created, an inventory item is also created. Hence, Oracle Inventory needs to be set up correctly.
Programs	Oracle Trade Management	Oracle Trade Management is used to create offers to provide discounts, which in turn uses Oracle Advanced Pricing.
Enrollments	Oracle Order Management	Oracle Order Management is used to process sales orders when a partner submits an enrollment request for a program that contains fees. It is used to process financial liabilities. Oracle Order Management is also used to process orders for different payment modes such as cash, check, credit card and purchase order
Enrollments	Oracle iPayment Server	If partners use the credit card payment mode to pay fees, the iPayment Server is used to process payment.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Enrollments	Oracle Receivables	The payment billing address has to be validated against tax locations. For this, the address validation option in Oracle Accounts Receivables needs to be set up.
Enrollments	Oracle Approvals Management	Approvers for enrollment requests are setup in Oracle Approvals Management.
Opportunity Management	Oracle Sales Online	Opportunity management for partners leverages the Sales Online opportunity module to support the assignment of indirect opportunities to partners. With this extension, vendors can route opportunities to partners.
Opportunity Management	Oracle Leads Management	When a lead is created and the lead engine determines that it is a valid lead and should be channeled as indirect, the lead may be converted to an indirect opportunity and routed to partners by the partner-matching engine.
Opportunity Management	Oracle Marketing	Users can create and execute an email campaign schedule as well a web campaign schedule to target partners. For campaigns targeted at partners that result in indirect opportunities, vendors can route these opportunities to partners that participated in the campaigns.
Opportunity Management	Oracle Inventory	You can assign a product to an opportunity.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Referral Management	Oracle Trade Management	<p>Vendors can compensate partners through Oracle Trade Management in the areas of offers, budgets and claims.</p> <p>Budget - Vendors can source the referral benefit from one or more fixed and active budgets to pay out the partner's compensation.</p> <p>Offer - A Net Accrual Offer is created for each referral benefit using the budget specified in the benefit. All referrals created using this referral benefit accrue against this offer. The offer is created in the background when the benefit is activated.</p> <p>Claims - A claim is generated by the system when a referred customer order is shipped. This is the means by which referral management system compensates a partner for referral submitted.</p>
Referral Management	Oracle Approvals Manager	This is used to identify approvers for referrals submitted and also to identify the person responsible for checking customer duplicates and de-duplication on a referred customer.
Referral Management	Oracle Customer Data Quality Manager	Referral Management leverages TCA-DQM functionality to find potential customer or contact matches in the system for the referred customer and contact. This reduces the occurrences of creating duplicate parties in the system.
Referral Management	Oracle Territory Manager	Territories are used to define the geographic boundaries for which the deal benefit is applicable. These territories are defined under trade management usage with transaction type 'Offers'. For this release only the 'Country' qualifier is supported.
Referral Management	Oracle Sales Online and Oracle Leads Management	Referrals, when approved, create leads or opportunities depending on the referral benefit. Referral is fully integrated with Oracle Sales Online and Oracle Leads Management and enables the cross navigation between a referral and a lead or opportunity.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Referral Management	Partner Programs	Referral Management is implemented as a benefit that can be attached to any partner program. Partners, by enrolling into a program which has referrals as a benefit, gain access to the Referral Management functionality.
Referral Management	Oracle Workflow	Integration with Oracle Workflow enables vendors to configure e-mail notifications for each referral status change.
Deal Registration	Oracle Approvals Manager	This is used to identify approvers for deals submitted and also to identify the person responsible for checking customer duplicates and de-duplication on a registered customer.
Deal Registration	Oracle Territory Manager	Territories are used to define the geographic boundaries for which the deal benefit is applicable. These territories are defined under trade management usage with transaction type 'Offers'. For this release only the 'Country' qualifier is supported.
Deal Registration	Oracle Customer Data Quality Manager	Deal Registration leverages the TCA-DQM functionality to find potential customer or contact matches in the system for the registered customer and contact. This reduces duplicate parties in the system.
Deal Registration	Oracle Sales Online	Deals, when approved, create opportunities. Deal registration is fully integrated with Oracle Sales Online and allows the cross navigation between a deal and an opportunity.
Deal Registration	Partner Programs	Deal Registration is implemented as a benefit that can be attached to any partner program. Partners, by enrolling into a program that has deals as a benefit, gain access to the Deal Registration functionality.
Deal Registration	Oracle Workflow	Integration with Oracle Workflow enables configuration of e-mail notifications for each deal status change.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Special Pricing Management-Offers	Oracle Trade Management	<p>When a special pricing request is approved, an offer is generated. Offers are created in Oracle Trade Management and the types of offers are:</p> <ul style="list-style-type: none"> ■ ScanData Offer - This offer is generated in the Existing Inventory scenario. The offer enables vendors to 'reimburse' partners for the discounted amount on products that partner have already bought. ■ Off Invoice Offer - This offer is generated in the New Inventory scenario. This offer acts as a pricing modifier for future orders. Vendors can see the Offer Type field during approval if the Ship from Stock check box is not selected. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to receive the discount. If vendors specify this type of offer, partners do not have to submit a claim. ■ Accrual Offer - This offer is generated in the New Inventory scenario. This offer acts as a pricing modifier for future orders. Vendors can see the Offer Type field during approval if the Ship from Stock check box is not selected. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to get the discount. If vendors specify this type of offer, partners have to submit a claim to receive the approved discount.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Special Pricing Management - Budgets	Oracle Trade Management	A default budget can be set up for sourcing special pricing requests. When a default budget exists, the system generates a budget request for the requested amount upon submission. The Budget tab can be configured to appear/not appear for the approvers. When the budget tab appears, approvers can change the budget sourcing options. If the approvers do not change the sourcing option, system automatically adjusts the budget amount based on the approved amount. Approvers can source only from budgets they have access to.
Special Pricing Management - Claims	Oracle Trade Management	<p>After a sale is completed at the discounted price, the partner can submit a claim to collect payment. Optionally claims can be submitted along with the sale data as a proof of performance through the Indirect Sales Management module of Trade Management. Claims are validated in Oracle Trade Management.</p> <p>Claims have to be submitted in the same vendor organization as the special price request is approved.</p> <p>For information, see <i>Oracle Trade Management Implementation Guide</i>.</p>
Special Pricing Management	Oracle Approvals Manager	This is used to identify approvers for special pricing requests submitted and also to identify the person responsible for checking customer duplicates and de-duplication on a referred customer.
Special Pricing Management	Oracle Customer Data Quality Manager	Special Pricing Management leverages TCA-DQM functionality to find potential customer matches in the system for the referred customer. This reduces the occurrences of creating duplicate parties in the system.
Partner Funds Management - Offers	Oracle Trade Management	When a fund request is approved, an offer of type lumpsum is generated. All lumpsum offers created use the seeded custom setup 'Soft Fund - Lumpsum'.

Table 2–1 Integrations With Other Applications

Task/Flow	Product	Description
Partner Funds Management - Budgets	Oracle Trade Management	Budget request approval can be enabled or disabled for funds requests from the 'Soft Fund - Lumpsum' custom setup. Approvers would be able to source only from budgets they have access to.
Partner Funds Management - Claims	Oracle Trade Management	<p>After a request is approved and the partner has executed the desired activity, they can submit a claim to collect payment. Claims are validated in Oracle Trade Management. Claims have to be submitted in the same vendor organization in which the fund request is approved.</p> <p>For information on claims, see <i>Oracle Trade Management Implementation Guide</i>.</p>
Partner Funds Management	Oracle Approvals Manager	This is used to identify approvers for fund requests submitted.

User Management

This chapter provides information on user types and responsibilities. Topics included are:

- [Section 3.1, "Overview"](#)
- [Section 3.2, "Responsibilities"](#)
- [Section 3.3, "Setups"](#)
- [Section 3.4, "Profile Options"](#)
- [Section 3.5, "Lookups"](#)

3.1 Overview

User management is the process of registering a user and thereafter maintaining the user in the system by granting or revoking privileges, accounts, customer profile information, and party relationships based on a set of business requirements. User management involves registering new users, modifying existing users, approving or rejecting user approval requests, setting up enrollments and registration templates, assigning users to business accounts, and more. The technology stack for performing most of the background setups and processes for user management is supplied through the Oracle CRM Technology Foundation and Oracle Common Application Components.

Oracle Partner Management also has a comprehensive set of user management capabilities, including the ability to register users, configure registration pages, approve users, and manage user profile information.

For complete information on utilizing the capabilities of the Oracle CRM Technology Foundation and Oracle Common Application Components, see the user management chapters of:

- Oracle Applications CRM System Administrator's Guide
- Oracle Common Application Components Implementation Guide
- Oracle Common Application Components User Guide

3.2 Responsibilities

Responsibilities are set up as part of system administration and is used across the Oracle e-Business Suite to give functional access to applications. Channel managers, sales representatives etc. are assigned responsibilities when their accounts are created.

Partners are assigned responsibilities based on their program enrollments and geography through the responsibility mapping table. Channel administrators can set up different responsibilities for different program and geography combinations. Based on the geography and the program that a partner enrolls in, a partner is granted the responsibility (primary user or business user). When the channel administrator adds, changes or deletes a responsibility, the concurrent program 'PV - Assign/Revoke user responsibilities' is automatically run to update partner responsibilities. The partner responsibilities are automatically updated when the channel administrator updates the responsibility tied with a rule.

For partners, responsibilities are determined based on the exact geographical region match, user type, and program.

In the Responsibility mapping screen, while selecting a responsibility, the LOV uses the following criteria to filter responsibilities:

- Responsibility application has to be Oracle Partner Relationship Management for it to show up in the Responsibilities LOV in the Responsibility Mapping Rules UI.
- PV: Is External Responsibility profile option needs to be set to Yes at the responsibility level for responsibilities that should show up in the Responsibilities LOV in the Responsibility Mapping Rules UI.

By default, a new partner user is assigned one of the responsibilities mentioned below, based on his/her user type:

- Primary User: Partner Super User
- Business User: Default Partner User

Newly registered partner users are assigned default responsibilities when the system cannot find any program responsibilities based on their enrollments into programs. These default responsibilities are figured out by matching the partner's address to the closest geography match and user type of responsibility mapping rules without any program attached. Oracle Partner Management ships two default responsibility mapping rules with the default partner user responsibility, without any program attached, and geography defined as 'World' and one for two partner user roles.

3.3 Setups

The following sections provide information on setups that are required for setting up users:

- [Section 3.3.1, "Creating a Channel Manager"](#)
- [Section 3.3.2, "Creating a Partner"](#)
- [Section 3.3.3, "Converting a Customer to a Partner"](#)
- [Section 3.3.4, "Partner Self Service Registration"](#)

3.3.1 Creating a Channel Manager

For information on creating a channel manager, see [Section 6.2.1, "Creating a Channel Manager"](#).

3.3.2 Creating a Partner

In this release, a partner can be created in three ways:

- Inviting them to enroll into programs.
- Converting existing customers to partners. For information on how to convert existing customers to partners, see [Section 3.3.3, "Converting a Customer to a Partner"](#).
- Partners can register themselves via the self-service registration process. For information on how partners can register themselves, see [Section 3.3.3, "Converting a Customer to a Partner"](#).

The channel manager or channel representative can invite new partners to enroll into a program. They can capture basic information about the partner organization, address details, partner contact details and program related information in which the channel manager or channel representative wants to enroll this organization. An invitation is sent to the newly created partner contact via e-mail.

Vendors can charge fees from partners for enrolling into a program and also offer discounts to attract partners. The discount can be a percentage amount or an absolute amount.

Use this procedure to invite a new partner.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page.

2. Click **Invite New Partner**.

The Create Partner page appears.

3. Enter details in the Address and Contact Information region and click **Next**.

The Create User page appears.

4. Select a default currency.
5. Enter a login user name/password for the partner.
6. Select a user type.

The user types are Business and Administrator.

7. Click **Next**.
The Invite Partner page appears.
8. Select a program from the Program Name drop-down list.
9. Enter any discounts if applicable.
10. Enter details in the Enrollment Fees region and click **Invite Partner**.

3.3.3 Converting a Customer to a Partner

You may have many customers and any customer can become a partner of your organization. You can convert an existing customer to a partner at any given point in time. You can choose any existing customer who is not yet a partner. Before converting a customer, you must decide the Partner type and Member type that the converted customer will fall under. When the customer is converted to a partner, the partner will be enrolled in the default program. After conversion, the partner will be directed to the Partner Details page.

Use this procedure to convert existing customers to partners.

Prerequisites

None.

Steps

1. Log in as a channel administrator and navigate to Partners > Convert Customer to Partner page.

The Partner Conversion page appears.

2. Select a customer from the Customer Name LOV (filtered on organizations without a partner relationship).
3. Enter partner specific information such as Partner Type and Member Type.

If you select the 'Subsidiary' Member Type, the Global Partner LOV will be enabled.

Partner's Channel Team

- If you are a channel manager, you will be added to the partner's channel team in addition to the channel managers returned by the Territory Assignment Program.

- If you are not a channel manager, channel managers returned by the Territory Assignment Program will be assigned to the partner.
 - If the Territory Assignment Program does not return any channel manager, and the logged in user is not a channel manager the Default channel manager will be assigned to the channel team. For more information on the Territory Assignment Program, see [Territory Assignment Program](#).
4. Click **Convert to Partner** to convert the customer to a partner.

Upon conversion, the partner should be enrolled in the Default Program set per the profile option. You can now manage the partner contact and their user information.

Territory Assignment Program

This release provides a territory based security model to access partner information. When a partner is created, the system automatically identifies the channel manager(s) to be assigned based on the territory definition. You can define territories and specify territory qualifiers, such as geography, partner type etc. for a territory. For example, territory A could mean all the states in the East Coast of the U.S. that have global partners (global membership type). While defining a territory, you can also specify the channel manager responsible for that territory. For example, territory A (Dallas) has Greg defined as the channel manager. If the newly created partner (NP) is from Dallas, Greg will automatically be assigned to NP as the channel manager by the system. Territory definitions can change over time. You can also manually assign users to partner organizations thereby bypassing the territory definition. Users with the 'Super User' role can access all partners irrespective of the territory definition.

3.3.4 Partner Self Service Registration

Partners can register themselves or their organization from the 'Register Here' link or by using any other custom link like 'Register My Partner Organization' provided on any page during implementation.

The registration process is initiated and the partner is guided through a series of steps to submit the company and user information. Once this information is submitted, Oracle Partner Management generates a user account for the partner. The partner is provided a user name and password to log into the partner dashboard. The partner receives an e-mail notification with user name, password and organization identifier number.

A partner registered here is always registered as a partner administrator.

Partners can also create user accounts for users belonging to the organization using the self-registration process. Once the partner organization is registered, the partner administrator can create additional partner administrators or partner users.

Use the following procedure to register via self-service.

Prerequisites

None.

Steps

1. Log into Oracle iStore and select the Login icon.
2. Click **New User Registration**.
3. Select the Register as a partner option.
4. Click **Next**.
5. Enter organization details such as company name, address etc.
6. Enter personal details such as name, address, user name and password etc.
7. Select one or more Partner Types that become part of the profile.
8. If the partner is a subsidiary partner, enter the identification information of the global partner.

Once the registration is successful the confirmation is displayed and partners can log into the partner dashboard using the newly created user account.

3.4 Profile Options

[Table 3–1](#) lists the profile options that need to be set up for responsibilities.

Table 3–1 Profile Options

Profile Name	Required -Yes/ Optional	Level - Site/ Application/ Responsibilit y/User	Setting - Available setting choices	Description
PV: Is External Responsibility	Yes	Responsibility	Value is set to Yes	Setting this value to 'Yes' indicates that this responsibility can be assigned to an external user. For a responsibility to be displayed in the Responsibility LOV under 'Responsibility Mappings' this profile needs to be set to 'Yes'.

3.5 Lookups

Table 3–2 lists lookups that need to be set up for User Management.

Table 3–2 Lookups

Lookup Type	Value	Description
PV_USER_ROLES	BUSINESS	Business User (Partner User)
	PRIMARY	Primary User (Partner Administrator)
	ALL	All

Setting Up Profile Attributes

This chapter provides information on attributes used during implementation. Topics included are:

- [Section 4.1, "Overview"](#)
- [Section 4.2, "Partner Attributes"](#)
- [Section 4.3, "Setting Up Custom Attributes"](#)

4.1 Overview

Attributes provide important characteristic information on Oracle Partner Management business entities such as partners, partner contacts, leads, opportunities and so on. This helps companies increase knowledge of their partners' demographics, contacts and capabilities, such as who they are, what they sell, where they sell, what industries they focus on, what certifications they have, and so on. Thus, attributes are set up to capture additional specific business information for a given business entity within Oracle Partner Management.

To effectively manage partners and partner contacts, vendors need to collect an extended partner and contact profile. They can collect the profile information during the registration and enrollment process. The profile information can be updated by the partner and the channel manager and might require validation by the channel manager.

Oracle Partner Management provides an extensible framework to manually or automatically capture any kind of information about your partners, including performance measures and data derived from external sources. After you have defined attributes, the channel manager or the partner can enter profile information while enrolling into programs. The framework supports fixed attributes, information entered by the partner or channel manager, and derived attributes, information calculated based on partner data and transactions. Channel managers can use this information to differentiate partners and provide better services, such as fund requests, incentives, and opportunities.

Features in this Release

- Seeded Attributes - Vendors can track a partner's performance using seeded attributes.
- New Seeded Category - One new seeded category 'Marketing' has been added to support new attributes that are seeded as well.
- Performance attributes are seeded. Trends can be viewed by the time period for all performance attributes and trends can only be viewed from the performance tab.
- Derived attributes support the 'List of Values', 'Currency', 'Date', 'Percentage', 'Numeric', and 'Text' value types. The display style has been renamed to 'Value Type' for derived attributes. The 'List of Values' value type is used when you use a derived attribute in a rule. If the value type is 'List of Values', the user interface (UI) displays a drop-down list and users can select a value instead of entering it.

- A new value type, 'PERCENTAGE' is added to the Text and Derived attribute types to support performance related attributes that are rendered with % appended to the value.

Vendors can also:

- View a partner contact's profile information.
- Track attribute value history and view snapshots of attribute values.
- Create profile attributes that require validation.
- Allow attributes to be configured to be exposed to partners.

Attribute Value History and Snapshot of Attribute Values

Profile attribute values are constantly being updated by either partners, vendors, or programatically. Vendors can now track changes since attributes impact partner matching.

Vendors can see who made the change (user, or system), when the changes were made, and what the values are. For derived values, the attribute changes are logged, but not displayed.

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

Profile Attributes that Require Validation

Vendors can define a profile attribute that requires validation when a new value is entered. The partner submits the validation to the channel manager and the channel manager validates it. For more information, see [Section 4.3, "Setting Up Custom Attributes"](#).

4.2 Partner Attributes

Oracle Partner Management enables vendors to use profile attributes to segment their partners. Attributes can be used to create and track additional information about a partner or an opportunity. The application provides intelligent matching based on these profile attributes to ensure that opportunities are routed to the correct partner.

Attributes are available to a partner if the particular partner type has been specified while defining the attribute. Vendors can create attributes and flag it as 'require data validation'. This means that whenever a partner user adds or updates an attribute value, e-mail notifications are sent to channel managers of that partner. For

e-mail notifications to be sent, the profile 'PV: Enable Workflow To send e-mails' must be set to Yes.

When an attribute is defined for the first time and the 'Expose to Partner' check box is selected, the attribute is visible under the Company Profile.

Profile Attributes Types and Display Styles

Profile attributes can be grouped into different types and display styles. This ensures better quality of data and better integration with other parts of the application such as Enrollments.

Attributes that have display styles of radio button, drop-down, multi-select and check box can toggle between radio button and drop-down options, and between multi-select and checkbox options. Users can change the display styles from the Attributes Summary page or Attribute Details page by navigating to the Administration tab > Partner horizontal navigation link > Attributes side navigation link. For more information, see [Section 4.3, "Setting Up Custom Attributes"](#).

[Table 4–1](#) lists all the attribute types and display styles.

Table 4–1 Attribute Types and Display Styles

Attribute Type	Display Style	Can Users Create?
List of Values	Check Box	Yes
List of Values	Multi Select	Yes
List of Values	Percentage	Yes
List of Values	Radio Button	Yes
List of Values	Drop Down	Yes
List of Values	External LOV	No
Text Box	Currency	Yes
Text Box	Date	Yes
Text Box	Numeric	Yes
Text Box	Text	Yes
Text Box	Percentage	Yes
Text Box	Check Existence	No

Table 4–1 Attribute Types and Display Styles

Attribute Type	Display Style	Can Users Create?
Derived	Currency	Yes
Derived	Date	Yes
Derived	Numeric	Yes
Derived	Text	Yes
Derived	List of Values	Yes
Derived	Percentage	Yes

4.2.1 Attribute Categories

Attributes can be organized into different functional categories.

In this release, one new category, 'Marketing' has been added to support new attributes that are seeded. Vendors can set up new categories in Oracle Forms, by adding new lookup values to the lookup type 'Attribute Categories (PV_ATTRIBUTE_CATEGORY_TYPE)'.

Users can create additional categories during and post implementation.

Seeded Attributes

Seeded attributes are identified by a '*' prefixing their name. Vendors can modify seeded attributes by:

- Enabling or disabling seeded attributes
- Changing the attribute category
- Changing the display style
- Refreshing Frequency

[Table 4–2](#) displays seeded attribute values that are grouped in the General, Sales, and Marketing categories.

Table 4–2 Seeded Attributes

Attribute Name	Description	Category	Display Style	Enabled For
Additional Channel Offering	Additional services provided by the partner (Implementation specific)	General	Multi-Select	Partner
Capacity Rating	Partner's capacity rating (Implementation specific)	General	Drop-down	Partner
Claims Paid	Total claim settlement amount paid for soft funds and special pricing request based on settlement date	Marketing	Currency	Trend
Claims Paid YTD	Total claim amount paid for soft funds and special pricing request based on settlement date during the current fiscal year	Marketing	Currency	Partner
Country	Countries that the partner has a presence in	General	Multi-Select	Partner
Customer Annual Revenue	Annual revenue of the partner as stored in TCA table	General	Currency	Partner
DealsAccepted	Total deal amount accepted based on deal creation date	Sales	Currency	Trend
Deals Accepted Count	Total number of deals accepted based on deal creation date	Sales	Numeric	Trend
Deals Accepted YTD	Total deal amount accepted based on deal creation date during the current fiscal year	Sales	Currency	Partner, KPI
Deals Close Rate	Deals Closed Count/Deals Accepted Count	Sales	Percentage	Partner
Deal Closed	Amount of total number of closed opportunities, based on the date the deal status changes to 'Closed. Opportunity Won'	Sales	Currency	Trend
Deals Closed Count	Total number of closed opportunities based on the date the deal status changes to 'Closed. Opportunity Won'	Sales	Count	Trend
Deals Closed YTD	Amount of total number of closed opportunities, where the deal status changes to 'Closed. Opportunity Won' during the current fiscal year	Sales	Currency	Partner

Table 4–2 Seeded Attributes

Attribute Name	Description	Category	Display Style	Enabled For
Deals Submitted Count	Total number of deals that are not in draft status based on deal creation date	Sales	Count	Trend
Deals Submitted YTD Count	Total number of deals that are not in draft status based on deal created during the current fiscal year	Sales	Count	Partner
Deals accepted YTD count	Total number of deals accepted based on deal created during the current fiscal year	Sales	Count	Partner, KPI
Functional Expertise	Partner expertise with regards to vendor product or service offering	General	Multi-Select	Multi-Select
Funds Paid	Total settlement amount paid for fund requests based on the settlement date	Marketing	Currency	Trend
Funds Paid YTD	Total settlement amount paid for fund requests based on settlement date during the current fiscal year	Marketing	Currency	Partner, KPI
Funds Requested	Total amount requested for fund requests based on the submitted date	Marketing	Currency	Trend
Funds Requested YTD	Total amount requested for fund requests based on the submitted date during the current fiscal year	Marketing	Currency	Partner, KPI
Geographic Coverage	Partner's Geographic Coverage (Implementation specific)	General	Multi-Select	Partner
Inactive Partners	Total number of active partners that have not placed an order (where partner is the 'sold-to') in the time span specified by the profile ' PV: Inactive Partners Time Window'	General	Count	KPI
Indirect Sales	Total amount based on the transaction date. This information is captured by Oracle Trade Management from the Point-of-Sale system	Sales	Currency	Trend
Indirect Sales Prior year	Total amount based on transaction date during last fiscal year. This information is captured by Oracle Trade Management from the Point-of-Sale system	Sales	Currency	Partner

Table 4–2 Seeded Attributes

Attribute Name	Description	Category	Display Style	Enabled For
IndirectSalesYTD	Total amount based on transaction date during the current fiscal year. This information is captured by Oracle Trade Management from the Point-of-Sale System	Sales	Currency	Partner, KPI
Industry	Partner's Industry (Implementation specific)	General	Multi-Select	Partner
Last Order Date	Date of the last order where partner is the 'Sold to' party base on last ordered date	Sales	Date	Partner
New Partners	Total number of partners created in the time span specified by the profile 'PV: New Partners Time Window'	General	Count	KPI
Open Claims	Total amount remaining for all open claims generated from referral, soft funds and special pricing	Marketing	Currency	Partner, Trend,KPI
Open Opportunities	Total amount of open indirect opportunities that a partner is working on	Sales	Currency	Partner, Trend,KPI
Open Opportunities Count	Total number of open indirect opportunities that a partner is working on	Sales	Count	Partner, Trend,KPI
Opportunities Won	Total amount of indirect opportunities that a partner has won based on decision date	Sales	Currency	Trend
Opportunities Won Prior year	Total amount of indirect opportunities that a partner has won based on decision date during the last fiscal year	Sales	Currency	Partner
Opportunities Won YTD	Total amount of indirect opportunities that a partner has won based on decision date during the current fiscal year	Sales	Currency	Partner
Opportunity Acceptance Rate	Number of opportunities accepted by partner or the number of opportunities offered to partner	Sales	Percentage	Partner, KPI

Table 4–2 Seeded Attributes

Attribute Name	Description	Category	Display Style	Enabled For
Opportunity Close Rate	Number of opportunities won by the partner or the number of opportunities accepted by the partner	Sales	Percentage	Partner, KPI
Partner Enrollment Date	Partner enrollment date	General	Date	Partner
Partner Level	Partner level (Implementation specific)	General	Drop-Down	Partner
Partner Member Type	Partner member type (Standard, Global, Subsidiary)	General	Radio Button	Partner
Partner Name	Partner Name	General	Text	Partner
Partner Type	Partner type (End user, Original Equipment Manufacturer, Prospect, Distributor, Reseller). Users can define additional types	General	Check Box	Partner
Partnership Activity	Partnership Activity (Implementation specific)	General	Multi-Select	Partner
Product Categories for Special Pricing	Product categories that a partner is authorized to submit special pricing requests for (Implementation specific)	General	Multi-Select	Partner
Products Bought Last Year	List of products bought by the partner in the last twelve months. (from the current date) This is captured by taking union of products on all orders shipped last year where Partner is the 'Bill to' party	Sales	List	Partner
Products Sold Last Year	List of all products sold by the partner in the last twelve months. (from the current date) This metric is calculated by taking union on products on all line items maintained in the POS table against the given partner	Sales	List	Partner
Referral CommissionPaid	Total commission amount paid based on the date the referral status changes to 'Closed. Fee Paid'	Marketing	Currency	Trend
Referral Commissions Paid YTD	Total commission amount paid based on the date the referral status changes to 'Closed. Fee Paid' during the current fiscal year	Marketing	Currency	Partner, KPI

Table 4–2 Seeded Attributes

Attribute Name	Description	Category	Display Style	Enabled For
ReferralsAccepted	Total referral amount accepted based on referral creation date	Marketing	Currency	Trend
Referrals Submitted Count	Total number of referrals that are not in draft status based on referral creation date	Marketing	Count	Trend
Referrals accepted YTD	Total referral amount accepted based on referral creation date during the current fiscal year	Marketing	Currency	Partner, KPI
Referrals accepted YTD count	Total number of referrals accepted based on referral creation date during the current fiscal year	Marketing	Count	Partner, KPI
Referrals submitted YTD count	Total number of referrals that are not in draft status based on referral creation date during the current fiscal year	Marketing	Count	Partner
Sales	Total amount of all orders shipped where a partner is the 'sold-to' party, based on the order date	Sales	Currency	Trend
Sales Prior Year	Total amount of all orders shipped where a partner is the 'sold-to' party, based on order date during the prior fiscal year	Sales	Currency	Partner
Sales YTD	Total amount of all orders shipped where a partner is the 'sold-to' party based on order date during the current fiscal year	Sales	Currency	Partner, KPI
State	States that the partner has a presence	General	Multi-Select	Partner
Total Partners	Total number of partners managed	General	Count	KPI

4.2.2 Seeded Attributes - LOVs

LOV seeded attributes require the customer to set up a range of values.

The values can be set up:

- INTERNALLY: Enter attribute values by navigating to Administration > Partner horizontal navigation link > Attributes side navigation link > View Values link in Summary Page. For more information, see [Section 4.3, "Setting](#)

[Up Custom Attributes](#)". For information on the LOV set up, see the LOV setup required column in the table below.

- LOOKUP VALUES: Specify the lookup type. Enter attribute values based on its LOV source.

Table 4–3 describes the seeded LOV attributes in Oracle Partner Management. The table lists all attributes whose possible values come from some 'list of values' which may be a lookup, view, and so on. This enables users to know where the values are coming from and where they can add more values. As indicated in the column 'LOV Setup Required', some attributes require set up.

Table 4–3 Seeded LOV Attributes

Attribute Name	Display Style	LOV setup required	LOV Source	Enabled For
Functional Expertise	Multi-Select	-	ENI_PROD_DEN_HRCHY_PARENTS_V WHERE PURCHASE_INTEREST = 'Y' AND (DISABLE_DATE IS NULL OR DISABLE_DATE > SYSDATE)	Partner
Product Categories for Special Pricing	Multi-Select	-	ENI_PROD_DEN_HRCHY_PARENTS_V WHERE PURCHASE_INTEREST = 'Y' AND (DISABLE_DATE IS NULL OR DISABLE_DATE > SYSDATE)	Partner
Partner Type	Check Box	Y	INTERNAL	Partner
Country	Multi-Select	-	FND_TERRITORIES_VL	Partner, Opportunity
Industry	Multi-Select	Y	LOOKUP (PRM_IND_CLASSIFICATION_ TYPE)	Partner, Opportunity
Partner Member Type	Radio Button	Y	INTERNAL	Partner
Geographic Coverage	Multi-Select	Y	INTERNAL	Partner, Opportunity
Additional Channel Offering	Multi-Select	Y	INTERNAL	Partner, Opportunity
Partnership Activity	Multi-Select	Y	INTERNAL	Partner, Opportunity

Table 4–3 Seeded LOV Attributes

Attribute Name	Display Style	LOV setup required	LOV Source	Enabled For
Campaign	External LOV	-	AMS_P_SOURCE_CODES_V WHERE SC.STATUS IN ('ACTIVE', 'ONHOLD','COMPLETED') AND SC.SOURCE_TYPE IN ('EVEH','EVEO','CAMP','CSCH')	Opportunity
Capacity Rating	Drop Down	Y	INTERNAL	Partner, Opportunity
Partner Level	Drop Down	Y	INTERNAL	Partner, Opportunity
State	Multi-Select	-	AR_LOCATION_VALUES WHERE LOCATION_SEGMENT_QUALIFIER = 'STATE'	Partner, Opportunity
Customer	External LOV	-	ASF_CUSTOMER_LOV_V WHERE PARTY_TYPE IN ('ORGANIZATION', 'PERSON')	Opportunity
Opportunity Status	Drop Down	-	AS_STATUSES_VL WHERE ENABLED_FLAG = 'Y' AND OPP_FLAG = 'Y'	Opportunity
Product Category	Multi-Select	-	ENI_PROD_DEN_HRCHY_PARENTS_V WHERE PURCHASE_INTEREST = 'Y' AND (DISABLE_DATE IS NULL OR DISABLE_DATE > SYSDATE)	Opportunity
Sales Channel	Drop Down	-	ASO_I_SALES_CHANNELS_V WHERE ENABLED_FLAG = 'Y'	Opportunity
Sales Stage	Drop Down	-	AS_SALES_STAGES_ALL_VL WHERE ENABLED_FLAG = 'Y' AND SYSDATE BETWEEN START_DATE_ACTIVE AND NVL(END_DATE_ACTIVE, SYSDATE)	Opportunity
Offer	External LOV	-	AMS_P_SOURCE_CODES_V	Opportunity
Win Probability	Drop Down	-	AS_FORECAST_PROB_ALL_VL WHERE ENABLED_FLAG = 'Y' AND ((SYSDATE BETWEEN START_DATE_ACTIVE AND END_DATE_ACTIVE) OR (SYSDATE > START_DATE_ACTIVE AND END_DATE_ACTIVE IS NULL))	Opportunity

Table 4–3 Seeded LOV Attributes

Attribute Name	Display Style	LOV setup required	LOV Source	Enabled For
Sales Methodology	Drop Down	-	AS_SALES_METHODODOLOGY_VL WHERE SYSDATE BETWEEN START_DATE_ACTIVE AND NVL(END_DATE_ACTIVE, SYSDATE)	Opportunity
Customer/Account Type	Drop Down	-	LOOKUPS (CUSTOMER_ACCOUNT_TYPE)	Opportunity
Routing Status	Drop Down	-	LOOKUPS (PV_ROUTING_STAGE)	Opportunity
Customer Category	Drop Down	-	AR_LOOKUPS WHERE LOOKUP_TYPE = 'CUSTOMER_CATEGORY' AND ENABLED_FLAG = 'Y'	Opportunity
Products Bought Last Year	Multi-Select	-	MTL_SYSTEM_ITEMS_B WHERE ORGANIZATION_ID = FND_PROFILE.VALUE('ORG_ID')	Partner
Products Sold Last Year	Multi-Select	-	MTL_SYSTEM_ITEMS_B WHERE ORGANIZATION_ID = FND_PROFILE.VALUE('ORG_ID')	Partner

4.2.3 Setting Up Refresh Frequency

For all attributes that are enabled for partner and partner trends, vendors can define how frequently attributes need to be collected or calculated for each partner. This information is used by both the 'PV: Refresh Partner Trend Values' and 'PV: Refresh Attribute Text Table' concurrent programs.

Navigate as a channel administrator to Partner > Profile Attributes. For each attribute (that is enabled for partner or partner trend), you can see the 'refresh frequency' link from where you can view details. If the particular attribute you have selected is enabled for both, partner and partner trends, you can set intervals for both.

Attributes without a refresh frequency are refreshed whenever the concurrent programs run.

The refresh types are:

- Hour - Refresh if the last refresh exceeds 'x' hours
- Day - Refresh if the last refresh exceeds 'x' days

- Week - Refresh if the last refresh was before 'x' weeks. Note: 1 week is not 7 days. For example, if the refresh frequency was set to 1 week, and the last refresh was on Friday and if the concurrent program was run on Monday, it will refresh since the week has changed.
- Month - Refresh if the last refresh was before 'x' months.

4.2.4 Performance Attributes

Performance attributes are used to track a partner's performance. These attributes are seeded and numeric in nature. For example, currency amounts, quantity or ratios (percentages). Some measures are cumulative and some are not. For example, sales figures are cumulative as vendors can add up the sales for each month to arrive at the sales figures for a whole year. Open opportunities count is not cumulative as vendors cannot add up the number of open opportunities for each month to arrive at the open opportunities count for a year, that is, opportunities that were open in January may already be closed in March.

Each seeded performance attribute is used to support one or more of the following metrics:

- Partner Trend
- Partner Performance
- Partner Group Performance

Each of the metrics represent data collected at different levels of granularity with Partner Trend being the most granular wherein data is collected by partner by month, Partner Performance wherein data is collected by partner, and Partner Group Performance wherein data is computed real-time by a group of partners. These metrics form a hierarchy with Partner Trend attributes at the lowest level and the Partner Group Performance attributes at the highest level. Each of the performance attributes are linked to one, more or all levels of performance metrics. For example, 'Open Opportunities Count' attributes is computed at all the three levels, that is, partner group performance, partner performance and partner trend.

Partner Performance

This is displayed in the Performance tab of the partner detail page and tracks the performance metric of an individual partner. These measures are calculated by the concurrent program 'PV - Refresh attribute text table'.

Partner Trend

This is displayed in the 'View Trends' UI which is accessible from the Performance tab. This tracks performance for a partner by month and the 'View Trends' user interface provides this data at a monthly, quarterly, or yearly level.

The concurrent program 'PV: Refresh Partner Trend Values' calculates these measures. The data stored is summarized by partner by month.

Partner Group Performance

These measures are displayed in the Key Metrics bin on the Channel Manager dashboard and are computed in real-time to display the aggregated performance metrics of partners they directly manage via the channel team or indirectly managed as implemented through the resource group hierarchies.

Channel representatives or channel managers can view the aggregated performance metrics of partners that they directly manage via the channel team or partners that they indirectly manage as implemented through the resource group hierarchies.

4.2.5 Concurrent Programs

The following are concurrent programs that are required to run for profile attributes.

- The Workflow Notification Mailer program should be running if vendors want e-mail notifications to be sent.
- PV: Refresh Partner Trend Values - This program calculates the partner trend performance measures summarized at a monthly level.
- PV: Refresh Attribute Text Table - This program allows the attribute details for a particular partner to be used in the matching process and to calculate the performance and derived attributes for each partner. There are two options for running this program - Full Refresh or New Partners Only. The 'Full Refresh' option is the default option. The 'New Partners Only' option picks up all the newly created partners since the last refresh of this type. The last refresh date is stored in the profile 'PV: Refresh Search Attributes Last Update Date'.

[Table 4-4](#) provides the parameters of the PV: Refresh Partner Trend Values concurrent program.

Table 4–4 PV: Refresh Partner Trend Values

Parameter	Description
Start from Beginning of Month	Identifies the starting month to refresh (only applies to measures that are cumulative). Non-cumulative measures are always calculated for the current month only.
To Ending of Month	Identifies the ending month to refresh (only applies to measures that are cumulative). Non-cumulative measures are always calculated for the current month only.
New Partners Only	If 'Yes', then only process for new partners. New partners are defined as partners created after the last refresh run of this concurrent program (stored in the profile 'PV: Partner Trend Last Refresh').
Ignore Refresh Interval	If 'Yes', process all attributes even though the time interval from the last refresh have not exceeded the refresh interval set for some attributes.

For currency measures, this concurrent program converts all currency to the currency stored in the profile PV: Common Currency for Rules Engines. If this profile is not set, it defaults to USD.

Table 4–5 provides the parameters of the PV: Refresh Attribute Text Table concurrent program.

Table 4–5 PV: Refresh Attribute Text Table

Parameter	Description
New Partners Only	Only process for new partners. New partners are defined as partners created after the last refresh run of this concurrent program (stored in the profile 'PV: Refresh Search Attributes Last Update Date').

For currency measures, this concurrent program converts all currency to the currency stored in the profile PV: Common Currency for Rules Engines. The default value is 'USD'.

4.3 Setting Up Custom Attributes

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

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

Use this procedure to add or remove attributes.

Prerequisites

None.

Step

1. Log in as the channel administrator and navigate to Profile Attributes > Attributes - Overview page.
2. Click **Create**.
The Create Attribute page appears.
3. Select an attribute type from the Attribute Type drop-down list.
This determines how the values are presented. The choices are List of Values, Derived, and Text Box.
4. Select a display style from the Display Style drop-down list.
5. Enter a name, description and select a category from the Category drop-down list.
6. Select the Status as Active or Inactive.
7. Select the Expose to Partner check box to make the attribute visible in the Company Profile tab in the partner dashboard.
8. Select the Requires Data Validation check box to indicate that any updates to this attribute requires proof. Email notifications are sent to channel managers of the partner informing them that their partner has updated the attribute value.
9. Select the appropriate Related To check box.
The check boxes are entities for which attributes have to be enabled. For example, if it is selected for Partner, the attribute is enabled for Partner Profile windows and users can set values of attributes for partners. The available entities are Partner, Partner Contact, Opportunity, Lead Referral, Deal Registration.
10. Select a particular Country or accept the default as All.
11. Specify any of the following partner types to which this attribute applies.

Reseller, Original Equipment Manufacturer, Prospect, Distributor, End User, All.

12. Enable the attribute for either the Locator check box or the Matching Services check box.

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

If the attribute type is Derived in the Other Information Section, a table is displayed with a text box to enter SQL text for all the entities that this attribute is checked for. Users can enter SQL text so that they can validate and update.

13. Click **Create**.
14. In the Attributes - Overview page, click the profile attribute name hyperlink.
The Attribute Detail page appears.
15. Click **Profile Attribute Values** to add attribute values.
The Attribute Details - Properties page appears.
16. Enter a value in the Attribute Value field.
17. Enter a description in the Description field.
18. Select the Inactive check box to make the attribute inactive.
19. Click **Apply** to save your changes.

[Table 4–6](#) describes seeded LOV attributes in Oracle Partner Management.

Table 4–6 Profile Options

Profile Name	Level	Default	Default Value	Description
OS: Forecast Calendar	Site	None	-	This profile sets the accounting calendar that is used to determine the start and end dates for the company's fiscal year.
OS: Default Period Type for Currency Conversion	Site	None	-	Default Period Type for Currency Conversion
PV: Common Currency for Rules Engines	SARU	None	-	Used by the concurrent program 'PV: Refresh Partner Trend Values ' and 'PV Refresh Attribute Text Table' to convert and store all currency attributes in this currency. This enables currency comparison to be performed accurately.
PV: Partner Trend Last Refresh	-	-	-	Not updatable by the users. Used by Refresh Partner trend concurrent program to determine the last incremental refresh time.
PV: Refresh Search Attributes Last Update Date	-	-	-	Not updatable by the users. Used by Refresh Partner trend concurrent program to determine the last incremental refresh time.
PV: Vad/Partner Full Access To Profile Screens	SARU	Site	N	This profile determines whether a partner or distributor can update their company profile and their own profile information from the partner dashboard.
PV: Attribute Percentage Total	SARU	Site	100	For attributes with percentage display style, when users enter percentage for each item, the system validates that the sum of all the percentages add up to the number stored in this profile.

Setting Up the Partner Dashboard

This chapter provides information on how to set up the partner dashboard. Topics included are:

- [Section 5.1, "Overview"](#)
- [Section 5.2, "Configuring the Partner Dashboard"](#)
- [Section 5.3, "Best Practices"](#)
- [Section 5.4, "Bins"](#)
- [Section 5.5, "Partner and User Registration"](#)
- [Section 5.6, "Program Enrollment"](#)
- [Section 5.7, "Profile Options"](#)
- [Section 5.8, "Templates"](#)
- [Section 5.9, "Users and Security"](#)

5.1 Overview

The partner dashboard is the single entry point for all transactions on the vendor system. From the dashboard, partners can:

- Enroll into partner programs.
- Manage their memberships including upgrades and renewals.
- Manage transactions such as viewing the catalog, placing orders, managing sales opportunities, and accepting opportunities.
- Submit referrals, register deals, request for funds, request for special pricing requests, and create quotes.
- Maintain the partner contact and company profile.
- View their notifications.
- Access content published by the vendor.

The partner dashboard displays a summary of transactions and partners can click a link to navigate to the functional system. The list of transactions available depends on the program enrollments and role. For example, if they are authorized to resell a vendor's products, they are assigned sales opportunities.

5.2 Configuring the Partner Dashboard

The partner dashboard is set up by configuring sites. Oracle Partner Management is integrated with Oracle iStore to provide a partner dashboard.

A site is any site that the site administrator (manager) creates using the Oracle iStore Site Administration UI. To create a specialty site, the administrator must map the site to a partner responsibility and save it. Multiple specialty sites can exist within one site, as each site-responsibility combination is considered a specialty site. Specialty sites can be assigned to groups. The 'Partner' group is shipped out of the box to facilitate customers to group partner sites into a single group.

The root section of a site is called a dashboard (or home page).

5.2.1 Creating a Site

Use this procedure to create a site.

Prerequisites

1. Log into Oracle iStore as the administrator and navigate to the Catalog tab > Catalog Hierarchy page.
2. Select the 'Root' section for Oracle Partner Management and click the **Create Section** icon in the Sections column.

The 'Root' section is seeded. The Create Section page appears.

3. Enter necessary details and click **Apply**.

Ensure that the status is 'Published' and the dates are active. The Update Section: Details page appears.

4. To associate a template with the section, select the Templates side navigation link.

The Update Section: Layout page appears.

5. In the Layout region, from the Select Layout LOV, select a layout that you want to apply to the above created section and click **Go**. The layout determines the bins that should be displayed on the left and right side of the dashboard. The values are: Configurable Layout and Fixed Layout.

- If you select the Configurable Layout, perform the following steps to map the bins to templates. The templates are seeded in Oracle iStore.

- a. In the Mapping region, select a template from the Layout Component Templates LOV and map it to a layout component.

- b. Click **Apply**.

- If you select the Fixed Layout, you must map the bin JSPs to templates. You cannot see the Mapping region because the templates are already positioned and the layout cannot be configured.

- a. Navigate to Advanced tab > Template Manager > Templates page.

- b. Select Programmatic Access Name from the Search field and enter 'STORE_CTLG%' and click **Go**.

All seeded locations are displayed.

- c. Click **Update** for the 'Bin Left 1' record.

- d. In the Update Template page, click **Add Source File**.

- e. In the Add Source File page, in the Source File Name field, enter the JSP for Quick Links, for example, bin-ibeCAcdQuickLinkBin.jsp.

- f. Select the above created site from the Site drop-down list and click **Apply**.

The Update Template page appears with the JSP mapped to the bin.

6. Select the Display Layout side navigation link.

The Update Section: Display Template page appears. This page displays the format of the center bin only.

7. From the 'Select a Display Template' drop-down list, select 'Component for Section Contains Navigational Subsections Only' and click **Go**.

A section called 'Section Contains Navigational Subsections Only' appears in the bottom with different display templates.

Some templates are shipped to customers. The templates enable customers to select how they would like to view content in the center. Customers can use the following templates to display content:

- 'Multilevel Subsection list with Content' under Component for section contain navigation subsections only: This template is specifically designed to show subsections within a section, along with content mapped to content components at the section level.
 - 'Section detail' under section containing products only: This template is only available for configurable layout. This template is specifically designed to show section details, along with content mapped to content components at the section level.
8. Select the 'Multilevel Subsection List' template to be used in subsections and click **Apply**.

The display template for the section is selected.

For information on center template, see *Oracle iStore Implementation Guide*.

Steps

1. Navigate to the Sites tab and click **Create a Site** and enter necessary details.
2. In the Catalog Root Section filed, select the section created above.
Select the 'Restrict customer access by responsibility' check box.
Do not select the 'Allow un-registered users to browse the site' check box.
3. Click **Apply**.

A site is created and the Update Site: Details page appears.

4. Click the Responsibility side navigation link.

The Site ABC: Supported Responsibilities page appears. Customers can access the site through these responsibilities.

5. Click **Add Responsibility**.

6. In the Search and Select: Responsibility page, select any responsibility and click **Select**.

The responsibility is added to the site and only users with this responsibility can access the site.

7. In the Site Display Name field, enter a unique name.

The name should help in identifying that the site is applicable to partners.

8. In the Site ABC: Supported Responsibilities page, click the **Assign Groups** icon.

9. In the Update Site: Assign Groups page, select a group from the Unassigned Groups section and click **Move** to move it to the Assigned Groups section.

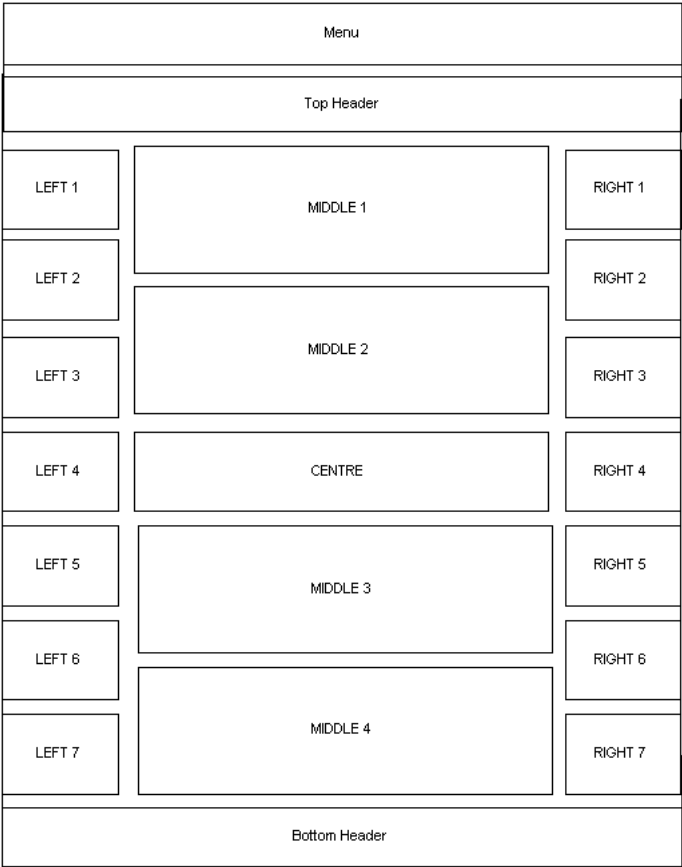
10. Click **Apply**.

The responsibility and site is assigned to the selected groups and partners can view sites that they have access to, through the responsibilities that they have received by enrolling into a program.

5.2.2 Partner Dashboard Template Layout

[Figure 5-1](#) displays the seeded partner dashboard template layout with top header, menu and bottom header locations.

Figure 5–1 Partner Dashboard Template Layout



- The top header layout component renders <html>, <head> tags. Customers can add any thing that they would like to see before rendering the menu. It provides an area for global icons, sections, and company logo located at the top of the page.
- The menu layout component renders logos, global icons, and the menu.
- The bottom header layout component renders </html> tags.
- The Top, Left 1-7, Middle 1-4 , Right 1-7, Bottom and Center layout components do not have templates mapped for the 'Configurable Layout'.

- To map a template for Top, Left 1-7, Middle 1-4 , Right 1-7, and Bottom layout components, navigate to Catalog > Section > Section Details > Templates > Layout > Configurable Layout.
- To map a template for the Center layout component, see Steps 6, 7 and 8 of the procedure, [Creating a Site](#).

5.3 Best Practices

Customers can implement the partner dashboard as they wish. Oracle Partner Management provides some seeded bins and they can plug the bins in any dashboard.

Using the 'Configurable Layout', you can create an effective partner dashboard for your partners. You can easily modify the seeded template by changing the style sheet and mapping your branding. The seeded dashboard allows you to deliver content to your partner using the central section and provide access to the transactional system by mapping the seeded bins (my opportunity, quick links and manage my partner bins) to the left and right locations. You can also use the locations on the left and right to map the Available programs, upgrade, renewal bins. You can also support registration through the registration global icon to support self service registration.

The template for self service registration is also seeded to provide a best practice example for the registration and enrollment flows.

For example,

- One location delivers the links for navigation to the transactional system.
- Another location delivers messages for partners via integration with Oracle E-merchandising.
- Another location enables vendors to deliver content by leveraging Oracle Content Management (OCM) and Oracle iStore (Section Hierarchy functionality).
- The dashboard displays a summary of transactions and partners can click a link to navigate to the functional system. The list of transactions available depends on the partner enrollments and the role. For example, if a partner is authorized to resell a vendor's products, the partner is assigned sales opportunities for fulfillment.

5.4 Bins

When a partner first logs into the dashboard, they can see bins such as Quick Links bin, Renewals bin, Upgrade bin, Available Programs bin, and My Opportunities bin if the customer has set them up. For partners to be able to view the bins, you must map the seeded templates. Each bin is defined as a template. Some bins are provided to customers so that they can map the bins to any template-site combination, during implementation.

The following bin templates are shipped out of the box. Customers need to map these bin templates to appropriate locations for the 'Configurable Layout'.

- [Quick Links](#)
- [Renew Programs](#)
- [Upgrade Programs](#)
- [Available Programs](#)
- [My Opportunities](#)
- [Manage My Partners](#)
- [Welcome](#)
- [Marketing Posting](#)
- [Partner Group](#)
- [Store Group](#)

5.4.1 Quick Links

This bin provides links to referrals, deal registrations, opportunities, special pricing, claims, fund requests, and messages. The list is based on vendor implementation and the partner responsibility.

The transaction records within each area, depend on the following:

- Partner benefits - Partners have to be entitled to use each type of benefit. The benefits displayed to the partner users in the Quick Links bin are controlled using responsibilities. The list of links available in the bin depends on the current responsibility assigned to the user and the functions and menus attached to that responsibility. For the links to appear in the Quick Links bin the following setup needs to be done:
 1. Define a menu that contains all functions, exposed to the partner user.

2. Specify this menu name as the value for the responsibility level profile option 'IBE: Quick Links Menu' that is assigned to the user. This menu specified in the profile should be one of the sub menus under the root menu.
- User role within the partner organization - Partners can access transactions that they created or are assigned to them. For example, if an opportunity is assigned to a partner, the partner can see that opportunity. If a partner created a referral, he/she can view the referral. Partner administrators can access all transactions created by any user or, transactions assigned to any user, within their organization.

5.4.2 Renew Programs

This bin displays programs that are up for renewal. The bin is available only to partner administrators to assist them manage their memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link. The renew option appears to the user when the program is up for renewal. The default value is set to 60 days before membership expires.

5.4.3 Upgrade Programs

This bin displays programs that partners can upgrade to. The bin is available only to partner administrators to assist them manage their memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link.

5.4.4 Available Programs

This bin provides the ability to view program details and start the enrollment process. The bin is displayed only to the partner administrator. The link on the program name navigates to the program details page. If the user clicks on the 'Enroll' button, they can navigate to the questionnaire page for enrolling in that program.

5.4.5 My Opportunities

This bin is displayed to partners who have offered opportunities in the queue to accept and where the routing status is 'Offered'. Partners can navigate to the opportunity link to go to the Opportunity Detail page and view details of the opportunity. They must have the permission OPPTY_CONTACT to view this bin.

5.4.6 Manage My Partners

This bin displays the Invite New Partner and View Partner links for distributors. Distributors must have the 'Channel Manager' role or 'Channel Representative' role to see this bin. Distributors should also have the 'PV_INVITE_NEW_PARTNER' permission to see the 'Invite New Partner' link in this bin.

5.4.7 Welcome

This bin displays a welcome message with the user name and allows users to switch accounts if they have multiple accounts. User can switch between accounts before enrolling into a program or before submitting a referral to use a particular account.

For more information, see *Oracle iStore Implementation Guide*.

5.4.8 Marketing Posting

This bin displays marketing postings. E-Merchandising banners are used to deliver marketing messages to partners who can click on the bin to see more details about the marketing campaign.

For information on the implementation steps necessary for this bin, see *Oracle iStore Implementation Guide*.

5.4.9 Partner Group

Oracle iStore seeds a bin template which displays sites associated to the group, Partners. To display this group, map the logical template, PARTNER_GROUP_BIN_IBEWC, to the bin layout component of your choice.

For more information about the bin template, see *Seeded Bins* in the *Oracle iStore Implementation Guide*.

5.4.10 Store Group

For information on this bin, see the *Oracle iStore Implementation Guide*.

5.4.11 Bin JSPs -Template Mapping

[Table 5–1](#) indicates the templates and the corresponding bin JSP's which can be customized as per guidelines in the *Oracle iStore Implementation Guide*.

Table 5–1 Bin JSPs

Template	Bin JSP Name
Available Programs Bin	pvxCPvdPrgmNewBin.jsp
Renew Programs Bin	pvxCPvdPrgmRenewBin.jsp
Upgrade Programs Bin	pvxCPvdPrgmUpgradeBin.jsp
My Opportunities Bin	pvxCPvdMyOffrdOppBin.jsp
Manage My Partner Bin	pvxCPvdMngPrtnrBin.jsp
Accessible Stores Bin	ibeCAcdGroupSiteBin.jsp
Emerchandising Postings Bin	amsWebPlacement.jsp
Welcome Bin	ibeCAcdWelcome.jsp

The Quick Links and Marketing Postings bin are part of Oracle iStore. The Renewals, Upgrades, Available Programs and My Opportunities bins are included in Oracle Partner Management. These bins display content only to authenticated partner users. These bins do not display content for guest users even when the bins are mapped to sites that can be browsed by guest users.

The following APIs can be used to get data for the respective bins. Java Class is oracle.apps.pv.enrollment.bin.BinContent.

- public Vector newPrograms(...)
- public Vector renewable_programs(...)
- public Vector upgradable_programs(...)
- public Vector incomplete_programs(...)

For the Opportunity bin, the api is in: oracle.apps.pv.bin.MyOfferedOpptyBinDataSource and the method is public Vector getBinData(...)

5.5 Partner and User Registration

Partners can register themselves or their organization from the 'Register' global icon or link or using 'New User Registration' link in the sign-in page or by using any other custom link like 'Register My Partner Organization' provided on any page during implementation.

The registration process is initiated and the partner is guided through a series of steps to submit company and user information. Once this information is submitted, Oracle Partner Management generates a company and user account for the partner. The partner is given a user name and password, which, he/she selects during registration and then receives a notification about it.

A partner user registered using this process, is always registered as a primary user. Default roles and responsibilities are granted to a partner user upon the completion of the registration flow.

When a partner registers:

- A party record is created for the organization
- A party record is created for the contact
- A 'partner of' relationship is created
- A 'contact of' relationship is created
- Based on territories, the channel manager is identified and assigned to the partner. A channel team is assigned to the partner based on the territory setup. The channel team is a set of channel manager(s), who manages the partner.
 - For directly managed partners, channel managers are vendor employees.
 - For indirectly managed partners, channel managers are employees or vendor employees or both.

Territory Assignment Program

This release provides a territory based security model to access partner information. When a partner is created, the system automatically identifies the channel manager(s) to be assigned based on the territory definition. Vendors can define territories and specify territory qualifiers for a territory. The qualifiers are:

- Area Code
- City
- Company Annual Revenue
- Country, County
- Customer Category
- Number of Employees
- Partner Level

- Partner Name
- Partner Name Range
- Partner Type
- Postal Code
- Province
- State

For example, territory A could mean all the states in the East Coast of the U.S. that have global partners (global membership type). While defining a territory, they can also specify the channel manager responsible for that territory. For example, territory A (Dallas) has Greg defined as the channel manager. If the newly created partner (NP) is from Dallas, Greg is automatically assigned to NP as the channel manager by the system. Territory definitions can change over time. Vendors can also manually assign users to partner organizations in addition of the territory definition. Users with the 'Super User' role can access all partners irrespective of the territory definition.

Partners can also create user accounts for users belonging to the existing organization using the self-registration process or the primary user can create additional users by logging into the application and navigating to the Profile > Administration > Contact Management UI.

Users of an existing organization that are created through self service registration are always assigned business user roles. The primary user can switch these users to primary users from Profile > Administration > Contact Management > drilling the contact name > Roles UI.

Once the partner organization is registered, the primary user (Partner Administrator) can create additional primary users or business users.

The User Management framework of the Oracle E-Business Suite manages partner registrations. Registration involves the creation of a user and company account and collecting general data from partners. 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.

5.5.1 Enabling User Types

The following user types must be enabled using the CRM HTML administrator responsibility for registering partner organizations and partner users through user registration.

- IBE_PARTNER_BUSINESS to register partner users of an existing partner organization.
- IBE_PARTNER_PRIMARY to register a new partner and primary user of partner organization.

Use this procedure to enable the user types.

Prerequisites

None.

Steps

1. Login as the system administrator into the CRM Admin Console and navigate to Users tab > Setup > User Types.
2. Enable the following user types, only if you have Oracle Partner Management 11.5.10 or a higher version is installed.
 - IBE_PARTNER_BUSINESS
 - IBE_PARTNER_PRIMARY

For more information, see *Oracle iStore Implementation Guide*.

5.6 Program Enrollment

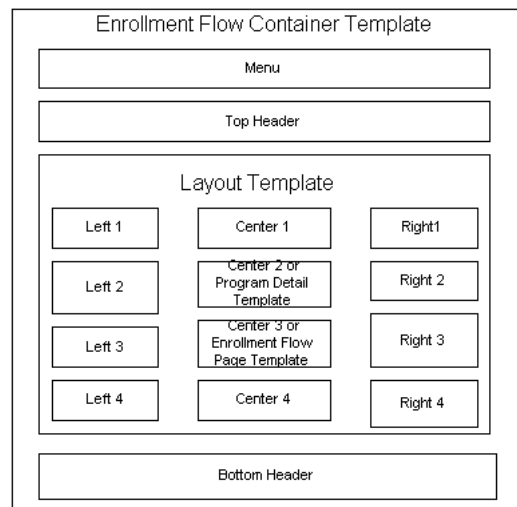
In the previous release, the enrollment flow provided a set of screens that could be configured to allow the partner to enroll in a program.

- Customers could not easily format enrollment pages or brand enrollment pages based on partner classifications.
- Customers could not easily add additional content to enrollment pages.

In this release, Oracle Partner Management leverages the template management framework to address these usability concerns. The registration framework supports enrollments. The enrollment pages are embedded in the registration flows. Users can now enroll into a program from the partner dashboard provided by a common foundation component called 'Template Management Framework'.

Figure 5–2 displays the enrollment flow template with top header, menu and bottom header locations.

Figure 5–2 Enrollment Flow Template



- The top header renders <html>, <head> tags. Customers can add any thing that they would like to see prior to menu rendering in this page.
- The Left 1, Left 2, Left 3, Left 4, Right 1, Right 2, Right 3, Right 4, Center 1, Center 2, Center 3 and Center 4 templates are part of the Layout template.
- The layout template includes the content rendering part of the enrollment flow.
- The bottom header renders </html> tags.

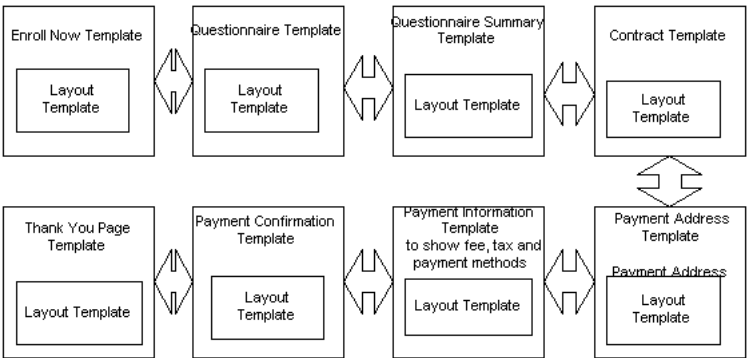
Enrollment pages do not have the menu section hierarchy. So, the menu template renders logo, global icons and a thin menu bar without any section hierarchy.

Each page in the enrollment flow has different data that needs to be processed when user clicks the **Next** button. Hence, each page in the enrollment flow has separate container pages. To minimize the amount of work when a customer wants to customize the layout, the same layout template is present across all the pages in the enrollment flow. Any change in the layout template is reflected immediately in all the pages of the enrollment flow.

The Enroll Now, Questionnaire, Questionnaire Summary, Contract, Payment Address, Payment Information, Payment Confirmation and Thank you pages are container templates.

Figure 5–3 illustrates the container templates mentioned above.

Figure 5–3 Container Templates



5.7 Profile Options

Table 5–2 indicates the profile options that can be setup for each of the partner responsibilities.

Table 5–2 Profile Options

Profile Name	Required- Yes/ Optional	Level - Site/ Application/ Responsibility/Use r	Setting - Available setting choices	Description
PV: Default Vendor Organization	Yes	This can be set up at the application or site level if there is only one internal vendor organization that should be used to create partner of relationship.	-	Needs to be set up for the default responsibility, when registering a new partner. Used during the self-service registration and Customer to Partner conversion to identify which internal organization should be used for creating partner-of relationship between partner and vendor internal organization.
FUNCTION_SECURITY_REGION	Yes	Responsibility	PV_PARTNER_FUNC_SEC_REGION	Needs to be setup for the Partner Super User responsibility if this responsibility is used.
IBE: Enable Shopping Cart Global Icon	Optional	SARU	No	Used to disable the Shopping Cart global icon for partner sites. This needs to be turned off at partner site responsibility.
IBE: Enable Order Tracker Global con	Optional	-	No	Used to disable the Order Tracker global icon for partner sites. This needs to be turned off at partner site responsibility.
IBE: Enable Quick Search	Optional	-	No	Used to disable quick search for partner sites. This needs to be turned off for the partner site responsibility.

Table 5–2 Profile Options

Profile Name	Required-Yes/Optional	Level - Site/Application/Responsibility/Use r	Setting - Available setting choices	Description
IBE: Use Web Placements	Yes	-	-	Needs to be set to 'View eMerchandising Postings' in the marketing postings bin. The Marketing postings bin requires additional implementation steps to see the eMerchandising postings in the partner site. For more information, see <i>Oracle iStore Implementation Guide</i> .
IBE: Quick Links Menu	Yes	Responsibility	-	This is a mandatory profile if the Quick Links bin needs to be displayed when logging in with a particular responsibility. Needs to be setup to the correct FND menu from which quick links are rendered. This needs to be setup at responsibility level for partner site responsibility. Partner Super User responsibility should have this profile option setup as Partner User Sub Menu.
IBE_USE_ORDER_TRACKER	Optional	SARU	-	The order tracker icon is displayed by default in the global icons section of any site. The icon can be disabled using this profile. This profile has the site level value seeded as 'Yes'. Customers can turn off this profile at the application level if Oracle Partner Management and Oracle iStore are not implemented together in one site. If Oracle iStore and Oracle Partner Management are both implemented, this profile should be set to 'No' at the partner responsibility level.

5.8 Templates

The following templates are used in partner specific profiles pages in the partner dashboard:

- Sales Preferences: Template to view the sales preferences page. Navigate via the Profile icon > My Profile > Preferences.
- Update Partner Profile: Template to view the partner organization's profile page. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
- Update User Profile Page: Template to view the contact's Update Profile page. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
- View Channel Team for Partner: Template to view the channel team page. Navigate via the Profile icon > Company Profile > Channel Team.
- View Current Partner Memberships: Template to view the memberships page. Navigate via the Profile icon > Company Profile > Memberships.
- View Partner Profile: Template to view the partner organization's profile page. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
- View User Profile Page: Template to view the contact's profile. Navigate via the Profile icon > My Profile > Contact Information > Profile tab.
- Update User Profile: Template for the contact update profile. Navigate via the Profile icon > Administration > Contact Management > Details > View Profile.
- View User Profile: Template to view the contact's profile. Navigate via the Profile icon > Administration > Contact Management > Details > View Profile.

The following templates are used in partner registration flow. For information on how these templates are used, see *Oracle iStore Implementation Guide*.

- Processing page for partner types during registration: Processing page template to process user selected partner type and member type during self registration of partner primary user.
- Displays partner types during registration: Template for displaying partner type and member type during self registration of partner primary.
- Displays user preferences during registration: Template for displaying user currency during self registration of partner primary user, business user, user management, user creation and user update page in the partner dashboard profile.

5.9 Users and Security

Access to the partner dashboard is controlled based on user types, responsibilities, permissions, and roles.

User Types

The user types are:

- Primary users have the administrative functionality which is granted through the use of permissions and roles.
- Business users can only access the user profile, preference and view their company profile.

Access to partner data depends on the following:

- Prerequisite: The vendor must be a resource with a channel representative or a channel manager role.
- A vendor user can see partner data if:
 - The vendor user is on the channel team of a partner
 - The vendor user is the manager of a user who is on the channel team (this means both the manager of the group where the vendor is defined as a member and the manager of a parent group)
 - The vendor user has the VIEW_ALL_PARTNERS permission.

Responsibilities

The two partner responsibilities supported in this release are:

- Default Partner User: This responsibility is used to display the partner dashboard to the partner user after the partner has registered but before the partner has enrolled in a program. After a partner enrolls in a program, Oracle Partner Management removes the preliminary partner user responsibility and assigns the responsibility of the program.
 - Partners with the 'Default Partner User' responsibility can only see the Available Programs bin. They cannot see the Quick Links bin since no menu is attached to this responsibility. They cannot see the Upgrade and Renewal bins as they are not enrolled into any program. Since the partner does not have offered opportunities, he/she cannot see the Offered Opportunities bin.

- **Partner Super User:** This responsibility includes the superset of all functionalities offered to partners. Partners can either be regular partners or distributors. Distributors are different from regular partners as they manage some partners on behalf of the vendor. Menus tied with the 'Partner Super User' responsibility can be used as a reference to create menus for custom responsibilities.

For defining menus that can be used with the Quick Links bin, see *Oracle iStore Implementation Guide*.

Permissions

A permission is a privilege that is granted to a user. It grants access to a resource. Resources are application elements such as JSP pages, objects, or methods of objects. A permission is implemented as a string. If a resource is protected by a permission, any user accessing the resource must have the permission required to access it. Permission names are case-sensitive. Permissions cannot be directly assigned to users. Instead, permissions are grouped into roles and roles are then assigned to users.

For information on creating permissions, see *CRM System Administrator's Guide*.

Users with the following permissions can access partner data:

- **PV_INVITE_NEW_PARTNER:** This permission is attached to a role and assigned to a primary user (when they get assigned the 'Channel Manager role or the 'Channel Representative' role) by default.
- **PV_UPDATE_ALL_PARTNERS:** This permission enables the user to view and update partner details.
- **PV_VIEW_ALL_PARTNERS:** This permission enables the user to view all partner records. If an internal user is assigned this permission, the profile information includes the complete partner profile. If an external user is assigned this permission, the profile information includes only the profile attributes defined as 'visible to the partner'.

Roles

A role is a group of permissions which can be assigned to a user. Like permissions, roles are implemented as strings. Role names are not case-sensitive.

For example, there is a JSP page "abc.jsp" that requires the permission "PERM_ABC." A user logs in and tries to access abc.jsp, but he or she cannot do that unless he or she has the permission "PERM_ABC." You want the user to be able to access the page, so you assign the role "ROLE_ABC" (which contains permission "PERM_

ABC") to the user. When given the appropriate role, the user is able to access the page.

For information on creating roles, see *CRM System Administrator's Guide*.

A role type (JTF_RS_ROLE_TYPE) has to be defined and then JTT roles have to be defined. Resources have to be created and roles must be attached to resources. A resource can be a resource, group and a team. Groups and teams can be added to this resource.

The JTA roles are:

- CHANNEL_MANAGER
- CHANNEL_REP

The JTT roles are:

- CHANNEL_MANAGER
- CHANNEL_ADMIN_UPDATE
- CHANNEL_ADMIN_VIEW

Oracle Partner Management will ship the following roles that are used in the user registration process and the partner dashboard:

- PV_PARTNER_PRIMARY_USER
- PV_PARTNER_BUSINESS_USER

[Table 5–3](#) lists permissions that are seeded with the Primary User (PV_PARTNER_PRIMARY_USER) role:

Table 5–3 Permissions of the PV_PARTNER_PRIMARY_USER Role

Permission Name	Description
PV_PARTNER_USER	Indicates that the user is a partner user.
PV_MY_CONTACT_PROFILE	Provides access to the partner’s profile. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
PV_SALES	Provides access to view sales preferences. Navigate via the Profile icon > My Profile > Preferences.
PV_PARTNER_UPDATE_PROFILE	Provides access to update a partner’s organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.

Table 5–3 Permissions of the PV_PARTNER_PRIMARY_USER Role

Permission Name	Description
PV_PARTNER_VIEW_PROFILE	Provides access to view a partner’s organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_VIEW_MEMEBERSHIPS	Provides access to view partner memberships. Navigate via the Profile icon > Company Profile > Memberships.
PV_CHANNEL_TEAM	Provides access to view a partner’s channel team. Navigate via the Profile icon > Company Profile > Channel Team.
PV_CONTACT_PROFILE	Provides access to view a contact’s profile information. Navigate via Profile icon > Administration > Contact Management > Detail > View More Details button.
PV_OPPTY_CONTACT	This is used to identify the partner contacts during opportunity routing.
PV_REF_COMP_APPROVER	This is defined for partners who can accept compensation. This permission enables partners to view and accept compensation for referrals.
PV_REFERRAL_SUPERUSER	This a ‘Super User’ permission defined for referral management. It can be assigned to vendors and partners. Vendors with this permission can view and update all referrals. Partners with this permission can view, update, and accept compensation for referrals for their organization.
PV_DEAL_SUPERUSER	This is a ‘Super User’ permission defined for deal registration. It can be assigned to vendors and partners. Vendors with this permission can view and update all deals. Partners with this permission can view and update all deals for their organization.

Table 5–4 lists permissions that are seeded with the Business User (PV_PARTNER_BUSINESS_USER) role:

Table 5–4 Permissions of the PV_PARTNER_BUSINESS_USER Role

Permission	Description
PV_PARTNER_USER	Indicates that the user is a partner user.
PV_MY_CONTACT_PROFILE	Provides access to the partner’s profile. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
PV_VIEW_MEMEBERSHIPS	Provides access to view partner memberships. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.

Table 5–4 Permissions of the PV_PARTNER_BUSINESS_USER Role

Permission	Description
PV_SALES	Provides access to view sales preferences. Navigate via the Profile icon > My Profile > Preferences.
PV_PARTNER_VIEW_PROFILE	Provides access to view a partner's organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_CHANNEL_TEAM	Provides access to view a partner's channel team. Navigate via the Profile icon > Company Profile > Channel Team.

Oracle iStore Permissions

Table 5–5 lists the Oracle iStore permissions for the for the PV_PARTNER_PRIMARY_USER and PV_PARTNER_BUSINESS_USER roles.

Table 5–5 Oracle iStore Permissions

Permission	Role	Description
IBE_INT_ASSIGN_ROLES	PV_PARTNER_PRIMARY_USER	Assigns roles in the User Management screens.
IBE_INT_PRIMARY_USER	PV_PARTNER_PRIMARY_USER	Identifies a user as primary user in the Administration screens.
IBE_INT_ORG_DETAILS	PV_PARTNER_PRIMARY_USER	Provides permissions to view organization details in the Company Profile screens.
IBE_INT_USER_MANAGEMENT	PV_PARTNER_PRIMARY_USER	Provides access to User Management screens.

Table 5–5 Oracle iStore Permissions

Permission	Role	Description
IBE_VIEW_NET_PRICE	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows a user to see all prices (that is, list prices, discount prices and net prices), instead of just Retail Price/Your Price in the shopping cart and Order Tracker pages. This permission does not affect the user's ability to view prices in the catalog. This permission also controls the pricing agreement, promotion code, and commitment functionalities in Oracle iStore. For users without this permission, it is recommended that they also not have the following permissions IBE_CHECKOUT, IBE_CREATE_ORDER, IBE_CREATE_RETURN, or IBE_VIEW_ORDER.
IBE_INT_ORG_EMAIL_ADDRESSES	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows to view company contact information.
IBE_INT_UPDATE_ORG_DETAILS	PV_PARTNER_PRIMARY_USER	Permission to update organization details in the Company Profile screens.
IBE_INT_CONTACT_DETAILS	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	This permission is currently not supported. Although they may appear in some seeded user roles, they are non-functional.
IBE_INT_ORG_ADDRESS_BOOK	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Permission to view company address book in the Company Profile screens.

Table 5–5 Oracle iStore Permissions

Permission	Role	Description
IBE_INT_ORG_TELEX_NUMBERS	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Permission to view telex numbers of the company in the Company Profile screens.
IBE_CHECKOUT	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows a user to see and use the Checkout button in shopping cart.
IBE_ASK_SALES_ASSISTANCE	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows a user to request sales assistance in the checkout phase, and to disagree with terms and conditions. If a user does not have this permission, the 'Need Salesrep Assistance' button in the Order Review page, and the 'I disagree - Need Assistance' button is not displayed.
IBE_INT_ADMINISTRATORS	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Gives users permission to view primary users of the organization in the Company Profile screens.
IBE_INT_ROLE_MANAGEMENT	PV_PARTNER_PRIMARY_USER	Gives users permission to create and update roles in the Role Management screens.
IBE_INT_MANAGE_CONTACT_INFO	PV_PARTNER_PRIMARY_USER	Gives users permission to update, create, and delete corporate addresses, e-mail addresses, phone numbers, and telex numbers in the Company Profile screens.
IBE_INT_MANAGE_CONTACT	PV_PARTNER_PRIMARY_USER	Gives users permission to update, create, and delete corporate addresses, e-mail addresses, phone numbers, and telex numbers in the Company Profile screens.
IBE_INT_ASSIGN_ACCOUNTS	PV_PARTNER_PRIMARY_USER	Gives users permission to assign accounts in the User Management screens.

Table 5–5 Oracle iStore Permissions

Permission	Role	Description
IBE_INT_PENDING_APPROVAL	PV_PARTNER_PRIMARY_USER	Gives users permission to approve users of the organization in the Pending Approval screens.
IBE_CREATE_BILLTO_CONTACT_ADDRESS	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows the user to create a new address associated with the bill-to contact which will have a bill-to relationship with the bill-to contact.
IBE_CREATE_SHIPTO_CONTACT_ADDRESS	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Allows the user to create a new address associated with the ship-to contact which will have a ship-to relationship with the ship-to contact.

Setting Up the Channel Manager Dashboard

This chapter provides information on how to set up the channel manager dashboard. Topics included are:

- [Section 6.1, "Overview"](#)
- [Section 6.2, "Setups"](#)
- [Section 6.3, "Profile Options"](#)
- [Section 6.4, "Concurrent Programs"](#)
- [Section 6.5, "Lookups"](#)
- [Section 6.6, "Users and Security"](#)

6.1 Overview

The channel manager dashboard provides vendors an easy to use, configurable user interface to help them with day to day responsibilities. It provides them with a 360 degree view of their partners and activities, thereby enabling them to make informed decisions.

The key features of the dashboard are:

- **Dashboard User Interface (UI)** - The dashboard UI includes a Key Metrics bin, Charts and Graphs indicating the sales performance of partners, Quick Links bin, and saved search results where vendors can personalize their search and save it. They can personalize the view of the dashboard and thus make it more efficient for their needs.
- **Key Metrics bin** - This bin provides a consolidated view of partners. The key metrics have been seeded (as derived attributes) and vendors can view attributes, how they relate to their partners and make informed decisions. They can also customize the key metrics view by enabling different attributes.
- **Partner Query tool** - Vendors can perform advanced searches based on profile attributes. They can customize the criteria by adding or removing search attributes to tailor their search. Oracle Partner Management integrates with Oracle Marketing to enable them to generate partner lists. These lists can then be used to run marketing campaigns and events thereby enabling marketing to partners.
- **Territory based security model** - This release provides a territory based security model to access partner information. When a partner is created, the system automatically identifies the channel manager(s) to be assigned based on the territory definition. Vendors can define territories and specify territory qualifiers, such as geography, partner type etc. for a territory. For example, territory A could mean all the states in the East Coast of the U.S. that have global partners (global membership type). While defining a territory, they can also specify the channel manager responsible for that territory. For example, territory A (Dallas) has Greg defined as the channel manager. If the newly created partner (NP) is from Dallas, Greg is automatically assigned to NP as the channel manager by the system territory definitions can change over time. Vendors can also manually assign users to partner organizations thereby bypassing the territory definition. Users with the 'Super User' role can access all partners irrespective of the territory definition.

- Partner Lists - Oracle Partner Management integrates with Oracle Marketing to enable vendors to generate partner lists that can be used to run marketing campaigns and events.

6.2 Setups

The following sections provide information on setups that are required for the Channel Manager Dashboard:

- [Section 6.2.1, "Creating a Channel Manager"](#)
- [Section 6.2.2, "Setting Up Resource Teams"](#)
- [Section 6.2.3, "Assigning User Management Roles \(JTT Roles\) to Vendor Users \(Employees\)"](#)
- [Section 6.2.4, "Territory Management Setup for Oracle Partner Manager Territory"](#)
- [Section 6.2.5, "Setting Up Graphs in the Channel Manager Dashboard"](#)
- [Section 6.2.6, "Workflow Business Event"](#)

6.2.1 Creating a Channel Manager

Prerequisites

None.

Steps

1. Log into Oracle Forms as the HR Manager and add an employee to Oracle Human Resources.
2. Switch to the 'System Administrator' responsibility and navigate to Security >User >Define.
3. Create a user name and password for the employee created in step 1.
4. Assign default responsibilities to the employee.
5. Switch to the 'CRM Resource Manager' responsibility and navigate to Maintain Resources > Resources.
6. Select a resource by finding an existing resource by entering a resource name in the 'Find Resource' pop-up window or by creating a new resource for an existing 'Employee' or a 'Party'.

7. In Resource Search Result window, click **Resource Details**.
8. Enter required information about the resource.
9. Ensure that a user is already created for this resource and tied to this resource.
10. Define the Role Type 'Partner Relationship Management' and associate the role of either 'Channel Manager' or 'Channel Representative' to the resource.
11. Save the resource setup.

6.2.1.1 Setting Up Resource Group Hierarchy

Resource group hierarchies can be setup for vendors. Managers of the vendor user's group and managers of the parent groups have the same privileges as that of the vendor user. For example, if the vendor user is a channel manager, the manager of the vendor user's group can view all requests made by the channel manager's partner. In all cases, any user who can view a request can add notes to a request. Any user who can update a request can only update certain fields, which is controlled by the request status.

Prerequisites

None.

Steps

1. Log in to Oracle Forms as a CRM Resource Manager and navigate to Maintain Resources > Resources.
2. The Define Group window pops-up. Enter all the required details about a group by entering the group name, description, and so on.
3. Enter 'Partner Relationship Management' usage under Usages sub-tab.
4. Add individual resources with 'Channel Manager' or 'Channel Representative' role as members of that group. These individual resources may be an employee of a vendor organization or a party.
5. Define 'Partner Relationship Management' role type and 'Channel Manager' or 'Channel Representative' role by clicking **Member Role**.

If this group is a child group, attach the parent group information under Parent Groups sub-tab.

If this group is a parent group, add the child group information under Child groups sub-tab.

6. Save the data.

6.2.2 Setting Up Resource Teams

Prerequisites

None.

Steps

1. Log into Oracle Forms as a CRM Resource Manager and navigate to Maintain Resources > Teams.
2. In the Define Teams window, enter all the required details about a team by entering team name, description, and so on.
3. Enter 'Partner Relationship Management' usage under Usages sub-tab.
4. Add member details by adding either the individual resources or group resources with 'Channel Manager' or 'Channel Representative' role.
5. Define 'Partner Relationship Management' role type and 'Channel Manager' or 'Channel Representative' role by clicking the member role button.
6. Save the data.

6.2.3 Assigning User Management Roles (JTT Roles) to Vendor Users (Employees)

Prerequisites

None.

Steps

1. Log into the self-service application as a user with the 'CRM HTML Administration' responsibility and navigate to Setup > Users > Registration.
2. Select User Maintenance.
3. Enter the user name (Vendor employee) in 'Enter Search Criteria' for User name field item and click **Go**.
4. Click on the hyper-linked user name given under User Name column in the displayed table. The 'User Details' page appears with a 'Roles' button.

5. Click **Roles**. The User-Role Mapping page appears with 'Available Roles' and 'Assigned Roles' shuttle box.
6. Assign any or the combination of required roles mentioned below:
 - PV_CHANNEL_ADMIN_UPDATE
 - PV_CHANNEL_ADMIN_VIEW
 - PV_CHANNEL_MANAGER
7. Click **Update** to save your changes.

6.2.4 Territory Management Setup for Oracle Partner Manager Territory

The following sections provide information on setting up Territory Management for Oracle Partner Manager Territory:

- [Setting Up Qualifiers](#)
- [Setting Up Territories](#)

6.2.4.1 Setting Up Qualifiers

Use the following procedure to set up Qualifiers.

Prerequisites

None.

Steps

1. Log in to Oracle Forms as a CRM Administrator and navigate to Territory Manager > Territory Administration.
2. Highlight the 'Administration' sub-menu in the top menu list.
3. Click on 'Setup Qualifiers' sub-menu, the Setup Qualifiers window appears.
4. Select Oracle Partner Manager usage from the list available on Usage field item in Find Qualifiers section of the Setup Qualifiers window.
5. Click **Find**. It displays all the partner qualifiers related to Oracle Partner Manager territory.
6. Enable or disable the seeded partner qualifiers based on the business requirements.

7. After making the changes in the seeded partner qualifiers, click **Update Qualifiers** to save your changes.

6.2.4.2 Setting Up Territories

Use the following procedure to set up Territories.

Prerequisites

None.

Steps

1. Log in to Oracle Forms as a CRM Administrator and navigate to Territory Manager > Territory Administration > Oracle Partner Manager.
2. Create a new territory by clicking the '+' sign by highlighting the 'Oracle Partner Manager' territory or modify an existing territory by double clicking on an existing territory.
3. Executing the previous step results in popping-up a 'Territory Details' form.
4. Define a territory by entering valid values to Name, Description, Start Date, Parent, Rank, and Winners etc. under Overview sub-tab. Ensure that the transaction type is 'Partner'.
5. Click the Transaction Qualifiers sub-tab to define all partner related transaction qualifiers for this territory by assigning the proper transaction qualifier values.
6. Click the Resources sub-tab to attach resources that have the channel manager or channel representative resource roles. A resource selected can be an individual, a resource group or a resource team. Each resource selected must have the access type as Partner.
7. Save the changes.

Note: After defining new territories or updating existing territories, the territory administrator has to execute the concurrent request program 'Generate Territory Packages'. The parameter values to this concurrent program must have 'Oracle Partner Manager' as usage and 'Partner' as transaction type. The new territory definitions are available for partners channel team assignment only after the concurrent request is executed successfully.

6.2.5 Setting Up Graphs in the Channel Manager Dashboard

For the graphs in the channel manager dashboard to be displayed correctly, the 'Accounting Calendar' must be set up and then the 'Refresh AS period days' concurrent program must be run.

To set up the calendar, log into Oracle Forms as the General Ledger Super User and navigate to Setup > Financials > Accounting > Calendar.

The 'as_period_days' table is populated based on the calendar setup. Since the x-axis labels for graphs are obtained from the 'as_period_days' table the above two setups are important.

6.2.6 Workflow Business Event

A business event is any event, which might be of interest to customers or development teams. For example, the creation of a partner might be a business event. The assignment of opportunity to a partner might be another example of a business event.

6.2.6.1 Workflow Event Subscriptions

Event Subscriptions to a business event typically perform any or all of the following actions:

- Execution of custom pl/sql code
- Sending the business event to a predefined workflow process
- Asynchronous messaging using Oracle Advanced Queuing

Event subscriptions can be enabled or disabled using a user interface. You do not have to change the code.

Oracle Partner Management provides features to assign indirect opportunities to partners, invite partners to enroll into a program and tools to determine performance of partners. Partner transactions like opportunity assignment, program enrollment etc. requires the partner status to be active. To determine if a partner is active, the following conditions need to be true:

- Relationship between partner and vendor status is active and relationship is not end dated.
- Partner Organization status is active.
- Vendor Organization status is active.
- Resource record tied to the partner is active in CRM resource manager.

Whenever the partner status changes (from active to inactive or vice-versa), an Oracle Workflow business event is raised to indicate a change in the status of the partner. Customers can subscribe to the partner status business event to take appropriate action using the 'Define Business Event Subscriptions' UI available under the Workflow Administrator Event Manager responsibility. The Workflow Business Event is seeded in the 'Add Business Event/Event Group' UI available under Workflow Administrator Event Manager responsibility as follows:

Column Name	Value
Internal Name	oracle.apps.pv.partner.Profile.updateStatus
Display Name	oracle.apps.pv.partner.Profile.updateStatus
Description	This event is raised every time the partner status changes.
Status	Enabled
Owner Name	Oracle Partner Relationship Manager
Owner Tag	PV
Customization Level	Limit

Event Organization Update

Every time any organization related partner qualifier (for example, Partner name, Annual revenue, Number of employee, Customer category and so on) values change, a workflow business event 'oracle.apps.ar.hz.Organization.update' is raised to indicate that the organization information is updated.

[Table 6–1](#) lists the subscription setup details for an organization.

Table 6–1 Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.Organization.update
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key

Table 6–1 Subscription Setup Details

Column Name	Value
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.organization_update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an updation in organization related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Partysite Update

Every time any party site related partner qualifier (for example, Identifying_address_flag, status and so on) value changes, a workflow business event 'oracle.apps.ar.hz.PartySite.update' is raised to indicate that the party site information is updated.

Table 6–2 lists the subscription setup details for a party site.

Table 6–2 Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.PartySite.update
Source Agent	-
Phase	50
Status	Enabled

Table 6–2 Subscription Setup Details

Column Name	Value
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.party_site_update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in the PV_TAP_BATCH_CHG_PARTNERS table, whenever there is a change in the organization party site related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Location Update

Every time any location related partner qualifiers (For example: City, County, Country, Postal code, Province, State and so on.) value changed, a workflow business event 'oracle.apps.ar.hz.Location.update' is raised to indicate that location information got updated. A code attached to the Rule function of the subscription executes.

[Table 6–3](#) lists the subscription setup details for a location.

Table 6–3 Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.Location.update

Table 6–3 Subscription Setup Details

Column Name	Value
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.location_update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an updation in organization location related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Contact Point Update

Every time any contact point related partner qualifiers (for example, Area Code) change, a workflow business event 'oracle.apps.ar.hz.ContactPoint.update' is raised to indicate that contact point information is updated.

Table 6–4 lists the subscription setup details for a contact point.

Table 6–4 Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.ContactPoint.update

Table 6–4 Subscription Setup Details

Column Name	Value
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg. contactpoint update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager

6.3 Profile Options

Table 6–5 lists the profile options that need to be set up for the Channel Manager Dashboard.

Table 6–5 Profile Options

Profile Name	Required - Yes/ Optional	Level - Site/ Application/ Responsibility/ User	Setting - Available setting choices	Description
PV: New Partners Time Window	Yes	Site Application Responsibility User	Numeric value. Seeded Value = 30	This is used in the Key metrics bin in the New Partners statistics. The bin shows the count of partners registered in the system in the last 'N' days where 'N' is the seeded profile value.

Table 6–5 Profile Options

Profile Name	Required - Yes/Optional	Level - Site/ Application/ Responsibility/ User	Setting - Available setting choices	Description
PV: Inactive Partners Time Window	Yes	Site Application Responsibility User	Numeric value. Seeded Value = 90	This is used in the Key metrics bin in the Inactive Partners statistics. The bin displays the count of partners in the system that have not placed any orders in the last 'N' days where 'N' is the seeded profile value.
PV: Territory Assignment Online	Yes	Site Application Responsibility User	Yes/No. Seeded Value = Yes	<p>If the value is set to 'Yes', the channel team assignment is performed real time during Partner Create/Update.</p> <p>If the value is set to 'No', the channel team assignment is performed with the submission of a concurrent request program 'PV: Channel Team Assignment for Partners in TOTAL/INCREMENTAL Mode'.</p> <p>It is recommended to set this profile option to 'No', if importing large volume of partners from an external system.</p>

6.4 Concurrent Programs

Table 6–6 lists concurrent programs that need to be run for the Channel Manager Dashboard.

Table 6–6 Concurrent Manager Program

Name of the program	Required - Yes or Optional	Description
Generate Territory Packages	Yes	After defining new territories or updating existing territories, the territory administrator has to execute this concurrent program. The parameter values to this concurrent program must have 'Oracle Partner Manager' as usage and 'Partner' as transaction type. The new territory definitions are available for partners channel team assignment only after the concurrent request is executed successfully.
PV: Channel Team Assignment for Partners in TOTAL/INCREMENTAL Mode	Yes	<p>Parameter Name: Mode</p> <p>Parameter Possible Values: TOTAL, INCREMENTAL</p> <p>Run this concurrent program in TOTAL mode if you have installed Oracle Partner Management 11.5.10 for the first time or have just upgraded to Oracle Partner Management 11.5.10. Vendors must define territories before running this program in the TOTAL mode. This concurrent program assigns channel team to all partners in the system based on the territory definition. They may also want to consider running this concurrent program in TOTAL mode, if there is a significant change in your territory definition.</p> <p>Frequency: Once after upgrading to/installing Oracle Partner Management 11.5.10 or every time the territory definition undergoes a major change.</p>

Table 6–6 Concurrent Manager Program

Name of the program	Required - Yes or Optional	Description
PV: Channel Team Assignment for Partners in TOTAL/INCREMENTAL Mode	Yes	<p>Run this concurrent program in INCREMENTAL mode if you have set the profile option PV: Territory Assignment Online to 'No' and added new partners, or, updated existing partners' territory qualifier values. Vendors must run this concurrent program in the INCREMENTAL mode, as it is possible that the partner territory qualifier values such as partner organization name, address and phone can be modified in other Oracle Application Modules such as Oracle Sales Online, Oracle Receivables and so on</p> <p>Frequency: Every day (minimum)</p>
PV: Define Channel team for specific territories	Yes	<p>Parameter Name: Territory 1 ... Territory 20</p> <p>Parameter Possible Values: Choose a territory name from the list of values.</p> <p>Run this concurrent program whenever there is a change in assignment of channel managers (resources) to a territory (that is, to take care of organization changes such as the current channel manager assigned to the territory leaves the organization and a new channel manager is assigned to the territory) or there is a change in territory transaction qualifier values (that is, a territory may originally be defined to take care of partners in California state in the United States and now you changed the definition to take care of Partners of type Resellers in California state in the United States).</p> <p>Frequency: Every time there is a change in territory setups.</p>

Table 6–6 Concurrent Manager Program

Name of the program	Required - Yes or Optional	Description
PV: Update Partner Status	Yes	<p>To determine if the status of a partner is active, all of the following conditions must be true:</p> <ol style="list-style-type: none"> 1. Relationship between partner and vendor status is active and relationship is not end dated. 2. Partner Organization status is active. 3. Vendor Organization status is active. 4. Resource record tied to the partner is active in CRM resource manager. <p>Checking for partner status in all the above-mentioned places causes significant performance issues. To address this issue the PV_PARTNER_PROFILE table is enhanced and STATUS column has been added. This column allows to have the definition of Partner Status in one place and helps improve the performance. Also whenever the partner status changes, a Workflow Business Event is raised to enable the other modules in Oracle Partner Management and other product teams and customers to subscribe to the business event to perform necessary action as well.</p> <p>This concurrent program needs to be scheduled to update the partner status periodically. <i>Between the concurrent job executions, it may be possible for the partner status to be in an inconsistent state as the partner data can be updated through other Oracle Application product UIs.</i></p> <p>Use the log file of the concurrent program to find out additional information when the concurrent program return status is error or warning.</p> <p>Frequency: Every day (minimum)</p>

Table 6–6 Concurrent Manager Program

Name of the program	Required - Yes or Optional	Description
Refresh AS period days	Yes	For the graphs in the dashboard and View trends to be displayed correctly, 'Accounting Calendar' must be set up and this concurrent program must be run. The as_period_days table is populated based on the calendar setup. For setting up the calendar, log into Oracle Forms as the General Ledger Super User and navigate to Setup > Financials > Accounting > Calendar.

6.5 Lookups

Table 6–7 lists lookups that need to be set up for the Channel Manager Dashboard.

Table 6–7 Lookup Values

Lookup Name	Lookup Type - System/ Extensible/ User	Value	Description
PV_INTERACTION_OBJECT_TYPE	System	ENRQ GENERAL MEMBERSHIP OPPORTUNITY PVDEALRN PVREFFRL SOFT_FUND SPECIAL_PRICE	Enrollment Request General Membership Opportunity Deal Registration Referral Soft Fund Request Special Pricing Request

Table 6–7 Lookup Values

Lookup Name	Lookup Type - System/ Extensible/ User	Value	Description
PV_ TRANSACTIONS	System	TRANS_CLAIMS TRANS_DEAL TRANS_FUND TRANS_OFFER TRANS_OPPTY TRANS_ORDERS TRANS_REF TRANS_SPR	Claims Deal Registrations Fund Requests Offers Opportunities Orders Referrals Special Pricing Requests
PV_ CMDASHBOARD_ GRAPH	System	M Q	Monthly Quarterly
PV_TREND_DATE_ RANGE	System	B5YEAR L2YEAR LYEAR YTD	Last 5 Years Last 2 Years Last Year YTD
PV_TREND_ PERIOD_TYPE	System	MONTH QUARTER YEAR	Month Quarter Year

6.6 Users and Security

Access to partner data is controlled with the help of Resource Roles (JTA), User Management Permissions and through a partner's channel team.

Roles

A role type (JTF_RS_ROLE_TYPE) has to initially be defined and then JTT roles have to be defined. Resources have to be created and roles must be attached to resources. A resource can comprise of a resource, group and a team. Groups and teams can be added to this resource.

The following resource roles determine if the logged in user is a channel manager:

- CHANNEL_MANAGER
- CHANNEL_REP

The JTT roles are:

- CHANNEL_MANAGER
- CHANNEL_ADMIN_UPDATE
- CHANNEL_ADMIN_VIEW

Permissions

Users with the following permissions can access partner data:

- PV_UPDATE_ALL_PARTNERS
- PV_VIEW_ALL_PARTNERS
- PV_INVITE_NEW_PARTNERS

The 'PV: Invite Partner' and 'PV: Invite New Partner' permissions are attached to a role and assigned to a primary user by default. The above permissions can be assigned to any user if desired.

The 'View All Partners' permission enables user to view all partner records. If an internal user is assigned this permission, the profile information includes the complete partner profile. If an external user is assigned this permission, the profile information includes only the profile attributes defined as 'visible to the partner'.

[Table 6–8](#) lists resource roles and User Management permissions that determine how channel manager's can access a partner's data in the Channel Manager Dashboard.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Vendor Employee	Channel Manager	Y	N	N	N	Can view and update all partners that are managed by the logged in user and as well as partners that are managed by channel managers or channel representatives reporting to the logged in user. Cannot invite new partners to join a program.
Vendor Employee	Channel Manager	Y	Y	N/A	N	Can view and update any partners in the system. Cannot invite new partners to join a program.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Vendor Employee	Channel Manager	Y	N	Y	N	Can view any partners in the system. Can update only those partners that are managed by the logged in user and partners that are managed by channel managers or channel representatives reporting to the logged in user. Cannot invite new partners to join a program.
Vendor Employee	Channel Manager	Y	N	Y	Y	Can view and update all the partners that are managed by the logged in user and partners that are managed by channel managers or channel representatives reporting to the logged in user. Can invite new partners to join to a partner program.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Vendor Employee	Channel Manager	Y	Y	N/A	Y	Can view and update any partners in the system. Can invite new partners to join a program.
Vendor Employee	Channel Manager	Y	N	Y	Y	Can view any partners in the system. Can update only those partners that are managed by the logged in user and as well as the partners that are managed by the channel managers or channel representatives reporting to the logged in user. Can invite new partners to join to a partner program.
Vendor Employee	Channel Rep	N	N	N	N	Can view and update only the partners that are managed by the logged in user. Cannot invite new partners to join to a partner program.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Vendor Employee	Channel Rep	N	Y	N/A	N	Can view and update any partners in the system. Cannot invite new partners to join to a partner program.
Vendor Employee	Channel Rep	N	N	Y	N	Can view any partners in the system. Can update only those partners that are managed by the logged in user. Cannot invite new partners to join a program.
Vendor Employee	Channel Rep	N	N	N	Y	Can view and update all the partners that are managed by the logged in user. Can invite new partners to join to a partner program.
Vendor Employee	Channel Rep	N	Y	N/A	Y	Can view and update any partners in the system. Can invite new partners to join to a partner program.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Vendor Employee	Channel Rep	N	N	Y	Y	<p>Can view any partners in the system.</p> <p>Can update only those partners that are managed by the logged in user.</p> <p>Can invite new partners to join a program.</p>
Vendor Employee	Any other role	Y	N	N	N/A	<p>Can view partners that are managed by the channel managers or channel representatives that report to the logged in user.</p> <p>The logged in user cannot update partner details.</p> <p>The logged in user cannot invite new partners to join A program.</p>

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Distributor	Channel Manager	Y	N/A	N/A	N	Can view only the partners that are managed by the logged in user and as well as the partners that are managed by the channel managers or channel representatives reporting to the logged in user. Cannot invite new partners to join a program.
Distributor	Channel Manager	Y	N/A	N/A	Y	Can view only the partners that are managed by the logged in user and as well as the partners that are managed by the channel managers or channel representatives reporting to the logged in user. Can invite new partners to join a program.
Distributor	Channel Rep	N	N/A	N/A	N	Can view only the partners that are managed by the logged in user. Cannot invite new partners to join to a partner program.

Table 6–8 Roles and Permissions

User Type	Resource Role	Manager in Resource Group Hierarchy	PV: Update All Partners	PV: View All Partners	PV: Invite New Partners	Description
Distributor	Channel Rep	N	N/A	N/A	Y	Can view only the partners that are managed by the logged in user. Can invite new partners to join a program.
Distributor	Any Other Role	N/A	N/A	N/A	N/A	No access to partner details.
Distributor	Any Role	N/A	N/A	N/A	N/A	No access to partner details.

Setting Up Programs

This chapter provides information on setups required for Programs. Topics included are:

- [Section 7.1, "Overview"](#)
- [Section 7.2, "Setups"](#)
- [Section 7.3, "Profile Options"](#)
- [Section 7.4, "Concurrent Programs"](#)
- [Section 7.5, "Lookups"](#)
- [Section 7.6, "Interaction with Other Modules"](#)
- [Section 7.7, "Security"](#)

7.1 Overview

Programs are used to segment partners and provide them with different benefits. Vendors can create programs for existing partners as well as new partners. Vendors can also recruit and maintain partners with specific incentive packages. This helps increase and maintain a strong partner community that further helps in increasing overall market share and revenues.

Vendors can also customize programs to recruit new partners and motivate existing partners. Programs can be created for groups of partner types, for example, Resellers, Value Added Resellers (VAR), Distributors, and so on.

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. Partners can gain access to the benefits by enrolling into a program that provides these benefits.

With this release, vendors can provide some additional benefits with a program. They are:

- Referrals - A partner refers business to the vendor and gets compensated when the referral is converted to an order.
- Deal Registrations - A partner registers a deal with the vendor for non-competition purposes.
- Special Pricing Requests - A partner requests for discounts for newly purchased inventory or to move existing inventory.
- Fund Requests - A partner can request for funds to carry out certain marketing activities.

7.2 Setups

The following sections provide information on setups that are required for this functionality.

Programs provide a basis to effectively segment and manage partner interactions across the Oracle e-Business Suite.

Creating a program involves:

1. Setting up program types and approvers
2. Using the AMS: Generic Approval framework for approvals
3. Creating an inventory item

Programs can be targeted for different partner types using program types. Program types are created in the Administration tab. For a program to be active, it needs to be approved. Approvers are setup using program types and a sequence can be associated with approvers to route approval requests sequentially. The 'AMS: Generic Approval Framework' is used to route approval requests, notifications, and get approvals.

For more information on the framework, see *Oracle Marketing User Guide*.

If a program is priced and a partner enrolls in it, a sales order is created using Oracle Order Management. To support order creation, the program needs to exist as an inventory item. So, when a program is created, an inventory item also gets created. Hence, Oracle Inventory needs to be set up correctly.

The setups needed to be able to create programs are:

- [Section 7.2.1, "Setting Up Program Types"](#)
- [Section 7.2.2, "Setting Up Program Approvers"](#)
- [Section 7.2.3, "Setting Up Payment Options"](#)
- [Section 7.2.4, "Setting Up Locking Rules"](#)
- [Section 7.2.5, "Setting Up Mandatory Rules"](#)
- [Section 7.2.6, "Setting Up Program Overview"](#)
- [Section 7.2.7, "Setting Up Contracts"](#)
- [Section 7.2.8, "Setting Up Price Lists"](#)
- [Section 7.2.9, "Setting Up Requirements"](#)
- [Section 7.2.10, "Setting Up Benefits"](#)
- [Section 7.2.11, "Mapping Responsibilities"](#)

7.2.1 Setting Up Program Types

A 'program type' is a combination of partner types. Only partners of selected partner types, can enroll in a program. Program types are created to control approval routings.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Program Types > Partner Program Types page.
2. Click **Create Type**.
The Create Partner Program Type page appears.
3. Enter appropriate details and save your changes.

7.2.2 Setting Up Program Approvers

For a program to be active, it needs to be approved. Approvers are setup using program types. When a user creates a program with a 'program type' and submits it for approval, a notification is sent to the approver associated with the program type. A sequence can be associated with approvers to route approval requests sequentially. The Oracle Marketing Framework (AMS: Generic Approval Framework) is used to route approval requests, notifications, and get approvals.

For more information on the framework, see *Oracle Marketing Implementation Guide*.

Approvers are setup while creating a program type.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to the Programs > Program Types > Partner Program Types page.
2. Click **Create Type**.
The Create Partner Program Type page appears.
3. In the Approvers region in the Create Partner Program Type page, select an approver using the User/Role LOV.
Approvers should have the responsibility 'Workflow User Web Application' to enable them to approve or reject a program.
4. Enter other details appropriately and save your changes.

7.2.3 Setting Up Payment Options

When partners enroll into a program, they have to pay a fee. They can pay by cash, credit, check or a purchase order. The method of payment depends on the geographical region that a partner is located in. When a partner enrolls in a program that requires a fee, payment methods based on this setup are displayed to them.

Payment methods are set up based on geographical regions and do not differ even if programs are available in different regions. Customers can thus use a common payment method for all programs.

Use this procedure to add a payment rule to specify available payment methods by geographic regions.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to the Programs > Payment Methods > Payment Option Details page.
2. Click **Add Payment Rule**.
The Payment Options Details page appears. Select a geographic region and specify applicable payment methods and click **Apply**.
3. Save your changes.

7.2.4 Setting Up Locking Rules

While creating a partner or a program, certain fields such as program level and program status must be locked depending on the program status. Locking rules can be created to select fields that should be locked to prevent updates. Since fields related to a partner or a program transit from one status to another, certain aspects of the fields must be locked to prevent modification in the future. Locking rules determine fields that are no longer updatable as a partner or program related field achieves a new status.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Locking Rules > Locking Rule page.
2. Select an object type, attribute and status from the respective drop-down lists.
3. In the Locking Rule region, specify fields that should be locked in a particular program status.
4. Save your changes.

7.2.5 Setting Up Mandatory Rules

While creating a program and defining program characteristics, certain fields such as program start date and program name are required to be filled. Mandatory rules are created to select fields that are mandatory to be filled before a program can be created.

Mandatory rules are created in the Administration tab.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Mandatory Rules > Mandatory Rule page.
2. Select an object type and attribute from the respective drop-down lists.
3. In the Mandatory Rule region, specify fields that are mandatory.
4. Save your changes.

7.2.6 Setting Up Program Overview

When a vendor user creates programs, they can create a summary (program overview) of the program which reflects details of a program. The summary is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. The summary can be the setup type, name, program start and end dates, owner, partner type, country, language, and description. Program summary can be set up by navigating to the enrollment questionnaire and clicking on the Program Overview button. The content is stored in/retrieved from Oracle Content Manager (OCM) and has to be approved before it can be publicly available.

Use this procedure to grant access privileges to vendor users (to create a JTA resource group and include vendors in the group) to create, update or approve program summary.

Prerequisites

Grant access privileges in OCM.

Steps

1. Log into the HTML application with the Content Super User responsibility.
2. Navigate to the 'PV_PRGM' directory under root.
3. Click on Folder properties.
4. Choose Access Control as 'Override'.
5. In the Permissions section, click on add another row and choose type and add the user/group/responsibility to the permission list and grant required privileges by and click **Apply**.

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

7.2.7 Setting Up Contracts

When partners enroll into a program, they might be expected to sign a contract. Global partners can be presented with contracts that differ from contracts presented to standard partners.

Multiple contracts can be associated to a program. The contracts are tied to the member type. Oracle Partner Management leverages the Oracle Contracts Core functionality to create and attach one or more contract templates to each program.

A contract template can be attached to a program based on geography, program and a partner's membership type in a program. When partners from these geographies enroll into the program, they are expected to sign the corresponding contracts.

Partners who subscribe to programs, can review terms and conditions associated with the contract template attached to this program and decide to accept, reject or print and fax the signed copy later.

For a contract to be available in Oracle Partner Management, users must create a contract template under the 'Partner Contracts' category.

In Oracle Partner Management, the contract template is displayed and not the actual contract. Vendors attach this contract template to a program. Once the partner clicks on Accept/Print and Fax/Reject during the enrollment, a new contract is created.

Use the following procedure to create a new contract template.

Prerequisites

None.

Steps

1. Log into Oracle Forms as a Contracts Administrator and navigate to Oracle Contracts > Contracts Navigator window > Tools.
2. Launch Contracts. The Oracle Contracts window appears.
3. Select the Contract Navigator tab and from the menu bar, select Tools > New to create a new contract template.

The Create a New Contract window appears.

4. Select 'Partner Contracts' as the category and click **Create**.

The Contracts Authoring window appears.

5. In the Contract Number field, enter a contract number to identify the template.
6. Select the Sell option from the Intent drop-down list.
7. In the Details tab, select a group name from the Group Name drop-down list.
8. From the menu bar, select Actions > Save as Template.

The Save As Template dialog box appears.

9. Enter a name in the Template Name field.
10. Save your changes.

Guidelines

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

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

7.2.8 Setting Up Price Lists

When partners enroll into a program, they are charged a price or a fee. A price is defined by associating a program with a price list. 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.

Pricelists are created in Oracle Advanced Pricing or Oracle Order Management based on the profile value 'QP: Source System Code' set in Oracle Partners at the application level. The value should be 'Oracle Pricing'. New pricelists can be created by logging in to the application and navigating to the Pricelist Setup window.

Multiple prices can be defined by associating a program with multiple price lists. If multiple price lists are associated, vendors need to define precedence so that the appropriate price is selected. The multi-currency feature of Oracle Advanced Pricing enables price lists to select the appropriate price.

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

7.2.9 Setting Up Requirements

When a program is created, requirements can be specified with it to qualify a partner. When a partner enrolls into this program, requirements are used to determine if the partner qualifies to enroll into the program.

Vendors must define a qualification pass/fail score for the partner enrollment application. Qualification rules can be defined for each program and the rules evaluate the partner's enrollment questionnaire.

Vendors can view if a partner has passed or failed the base criterion that is set for the program. The enrollment request approver can override the system generated result as and if necessary.

Before defining a requirement, attributes must be set up in the Administration tab.

Use the following procedure to create a new benefit.

Prerequisites

None.

Steps

1. Log in as the channel manager and click the Program Quick link.

The Partner Programs page appears.

2. Click a program name hyperlink.

The Edit Program page appears.

3. Click the **Requirements** side navigation link and add attributes or program prerequisites as requirements.
4. Save your changes.

7.2.10 Setting Up Benefits

Benefits are associated with a program and when a partner enrolls into the program, they can avail these benefits. Some of the benefits helps partners refer leads, register deals, request funds, access quotes, opportunities, submit special price requests and so on.

Benefits can be categorized into benefit types, viz. Deal Registration, Lead Referrals, Soft Funds, and Others.

The benefit framework provides an ability to:

- Store high-level benefit information in one place
- Present a summary view of these benefits available for partners
- Create 'Others' benefits
- Associate these benefits with a program.

The channel administrator can also create benefits of type 'Others' and associate these benefits with a program. Most of the benefits are defined in other modules such as Deal Registration, Lead Referrals, and Soft Funds except the 'Others' benefit type. Once these benefits are associated to a program, the partner is given these benefits upon their successful membership. The channel administrator can review all the benefits in the Benefits Administration screen. They can drill down to these benefits to view benefit specific details like soft funds, or lead referrals.

The channel administrator can create any benefit for a chosen benefit type by navigating to the corresponding benefit creation window. Only benefits in the 'Inactive' or 'Drafts' state have the 'Trash' icon enabled. When a benefit is active, it cannot be deleted unless the status is updated to 'Inactive'.

Use the following procedure to create a new benefit.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Benefits > Benefit Administration page.
2. Select a benefit type from the Create Benefit drop-down list and click **Go**.
The Benefits Creation page appears.
3. Enter a benefit name and select a benefit status and click **Apply**.
Only benefits with the 'Inactive' or 'Draft' status has the 'Remove' icon enabled. When a benefit is active, it cannot be deleted unless the status is updated to inactive.

7.2.11 Mapping Responsibilities

Responsibilities are set up as part of system administration and is used across the Oracle e-Business Suite to give functional access to applications. Channel managers and sales representatives are assigned responsibilities when their accounts are created.

Partners are assigned responsibilities based on their program enrollments and geography through the responsibility mapping table. Channel administrators can set up different responsibilities for different program and geography combinations. Based on the geography and the program that a partner enrolls in, a partner is granted the responsibility (primary user or business user). When the channel administrator adds, changes or deletes a responsibility, the concurrent program 'PV - Assign/Revoke user responsibilities' is automatically run to update partner responsibilities, that is, partner responsibilities are automatically updated when the channel administrator updates the responsibility tied with a rule.

For partners, responsibilities are determined based on the exact geographical region match, user type and program.

In the Responsibility mapping screen, while selecting a responsibility, the LOV uses the following criteria to filter responsibilities:

- Responsibility application has to be Oracle Partner Relationship Management for it to show up in the Responsibilities LOV in the Responsibility Mapping Rules UI.

- PV: Is External Responsibility profile option needs to be set to Yes at the responsibility level for responsibilities that should show up in the Responsibilities LOV in the Responsibility Mapping Rules UI.

By default, a new partner user is assigned one of the responsibilities mentioned below, based on his/her user type:

- Primary User: Partner Super User
- Business User: Default Partner User

Newly registered partner users are assigned default responsibilities when the system cannot find any program responsibilities based on their enrollments into programs. These default responsibilities are figured out by matching the partner's address to the closest geography match and user type of responsibility mapping rules without any program attached. Oracle Partner Management ships two default responsibility mapping rules with the default partner user responsibility without any program attached, and geography defined as 'World' and one for two partner user roles.

Use this procedure to map responsibilities.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Responsibility Mappings > Responsibility Mapping Overview page.
2. Click **Create Mapping** to add new responsibilities.
The Create Responsibility Mapping Setup page appears.
3. Select a geography level from the Geography drop-down list. Based on the geography level, select a geographical location from the location LOV.
4. Optionally, you can select a program name. Select a user role : All (for both business and admin users) , Business User or Partner User.
5. Select a responsibility name from the Responsibility LOV.
6. Click **Apply** to save your changes.

7.2.12 TCA Events and Subscriptions

1. Creating or Updating Relationships

In TCA, for global and subsidiary relationships, the relationship name used is PARTNER_HIERARCHY. To keep the member type up-to-date, the following TCA event subscriptions are registered for CREATE/UPDATE of the relationship status.

1. oracle.apps.ar.hz.relationship.update
2. oracle.apps.ar.hz.relationship.create

2. Change in Partner Address

If the address of a partner changes, a TCA event subscription is registered to update the partner user responsibilities.

- oracle.apps.ar.hz.location.update

The above subscription is seeded out of the box.

Setup

Run the concurrent program 'Workflow Agent Listener' with the parameter 'WF_DEFERRED'. Set this up to run every hour. This concurrent program is seeded in the request group of the responsibility 'System administrator'. When this concurrent program is executed, every subscription from every instance of events in the DEFERRED queue at that moment is executed. The Workflow Agent Listener concurrent program is shipped as 'DISABLED'.

7.2.13 Partner Invitations

Workflow sends out invitations to all the primary users of the partner organization. The workflow item type for this is PV: Partner Program Notifications and the workflow process used in the above item type is EVENT_NOTIF_PROCESS. This item type can be customized as needed.

7.3 Profile Options

[Table 7-1](#) lists the profile options that need to be set up for Programs.

Table 7–1 Profile Options

Profile Name	Required -Yes/ Optional	Level - Site/ Application/ Responsibility/User	Setting - Available setting choices	Description
PV: Default Program for New Partner	Optional	Site	-	When this profile option is set, every time a new partner is created in the system, the partner gets automatically enrolled into this program after registration.
AMS : Item Validation Master Organization	Yes	S/A/R/U	Organization Name	Inventory Organization in which a program is created as the inventory item.
PV: System Login URL	Yes	Site	<code>http://servername:port/OA_HTML/jtflogin.jsp</code>	This url is embedded in the program enrollment related workflow notification sent to partner and vendor users. The approver can view details of the program from this link.
PV:Self Service URL with Workflow Notification	Yes	Site	<code>http://servername:port/OA_HTML/US/ICXINDEX.htm</code>	This url is embedded in the program approval request notification sent to vendor users.
PV: Is External Responsibility	Optional	Responsibility	Yes/No	If this profile is set to 'yes' for a given responsibility, the system displays this responsibility in the LOV on the program benefits page. If this profile is set to 'no' for a given responsibility, system does not display the responsibility in the LOV on the program benefits page.

Table 7–1 Profile Options

Profile Name	Required -Yes/ Optional	Level - Site/ Application/ Responsibility/User	Setting - Available setting choices	Description
PV: iStore Login URL	Yes	Site	http://Machine Name:Port No/OA_ HTML/ibeCac dLogin.jsp? ref=ibeCZzd Minisites.j sp?grp=PART NER	This profile is to get the partner iStore login in workflow notifications. This should be set with the machine name and port number.
IBC: Use Access Control	Optional	Site	Null or No	Setting value to 'No' or 'Null' skips the security check in Oracle Content Management while creating the content for program through Summary window. See also Setting Up Program Overview .
QP: Source System Code	Yes	Site/Appl/ User	'Oracle Pricing' at Oracle Partner Management application level	Oracle Pricing: This value indicates that only price lists are created from 'Oracle Pricing' are recognized while associating the price list with the Partner Program object.

Table 7-1 Profile Options

Profile Name	Required -Yes/ Optional	Level - Site/ Application/ Responsibility/User	Setting - Available setting choices	Description
PV: Concatenated Inventory Flex Segments for Program	Yes	R/A/S	Free flow text	<p>This value is used to populate the key flexfield segment values while creating the program as an inventory item internally. The value should be in the format:</p> <p>Segment1.Segment2.Segment3.Segment4 etc. (Etc.is just to denote as many segments as implemented). Here Segment1, 2,3... should be the values of the key flexfield segments that are used for inventory item creation from program. The delimiter should be the one that inventory uses to define the segments. One of the segment values should have the code PV_PRGM_FLEX_CODE. This code is replaced with first five characters of program name concatenated with program_id while creating the inventory item. So, for example, the value could be US.SOFTWARE.EBUS.PV_PRGM_FLEX_CODE where US, SOFTWARE are key flexfield segment Values and '.' is delimiter.</p>

7.4 Concurrent Programs

Table 7-2 lists concurrent programs that need to be run for Programs.

Table 7–2 Concurrent Programs

Concurrent Program	Description
PV: Close Ended Programs and Memberships	This concurrent program is optional and updates the status to 'Closed' for all programs with program end date in the past of current system date.
PV: Refresh Partner Program Eligibility	Partner eligibility to enroll into a program based on the prerequisites is evaluated by this concurrent program. Run this atleast once a day to keep partner eligibility to enroll in a program up-to-date. If this concurrent program is not run, the new partner program created is only available for new partners and not for existing partners.
PV - Update user resp when resp mapping is created or deleted	This concurrent program is required. Any change in the responsibility mapping setup affects the responsibilities that get assigned to partner users. There is no fixed frequency.

7.5 Lookups

Table 7–3 lists lookups required for setting up Programs.

Table 7–3 Lookups

Lookup Type	Value	Description
PV_BENEFIT_TYPE	PVDEALRN PVREFFRL OZFSFBEN OTHERS STORES	Deal Registration Referrals Soft Funds Other benefit types Stores
PV_BENEFIT_STATUS	ACTIVE INACTIVE DRAFT FAILED_VALIDATION INACTIVE PENDING	Active Inactive Draft Failed Validation Inactive Pending
PV_LOOKUPS	-	The Benefit Type drop down gets lookup values from this lookup type.

Table 7–3 Lookups

Lookup Type	Value	Description
PV_PROGRAM_ BENEFITS	AOF	Access to Online Forms
	FPD	Free Product Demo
	IBB	Invitations to Business Briefings
	IQW	Invitations to Quarterly Workshops
	PH	Partner Helpdesk
	PN	Partner Newsletter
	PWK	Partner Welcome Kit
	RN	Regular Newflashes

7.6 Interaction with Other Modules

This section lists interactions with other Oracle Partner Management flows and other Oracle E-Business Suite products.

- Oracle Content Manager - When vendors create a program, they can create a summary of the program which reflects details of a program. The summary is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. The summary can be setup type, name, program start and end dates, owner, partner type, country, language, and description. Program summary can be set up by navigating to the enrollment questionnaire and clicking on the Program Overview button.
- Oracle Contracts - When partners enroll into a program, they might be expected to sign a contract. Global partners can be presented with contracts that differ from contracts presented to standard partners. Multiple contracts can be associated to a program. Contracts are tied to the member type. Oracle Partner Management leverages the Oracle Contracts Core functionality to create and attach one or more contract templates to each program.
- Oracle Marketing - For a program to be active, it needs to be approved. Approvers are set up using program types. When a user creates a program with a 'program type' and submits it for approval, a notification is sent to the approver associated with the program type. A sequence can be associated with approvers to route approval requests sequentially. The Oracle Marketing Framework (AMS: Generic Approval Framework) is used to route approval requests, notifications, and get approvals.

- Oracle Advanced Pricing - Pricelists are created in Oracle Advanced Pricing or Oracle Order Management based on the profile value 'QP: Source System Code' set in Oracle Partner Management at the application level. The value needs to be 'Oracle Pricing'. Multiple prices can be defined by associating a program with multiple price lists. If multiple price lists are associated, vendors need to define precedence so that the appropriate price is selected. The multi-currency feature of Oracle Advanced Pricing enables price lists to select the appropriate price.
- Oracle Order Management - If a program is priced and a partner enrolls in it, a sales order is created using Oracle Order Management. Also, pricelists are created in Oracle Advanced Pricing or Oracle Order Management based on the profile value 'QP: Source System Code' set in Oracle Partner Management at the application level.
- Oracle Inventory - To support order creation, the program needs to be present as inventory item. So, when a program is created, an inventory item is also created. Hence, Oracle Inventory needs to be set up correctly.
- Oracle Trade Management - Oracle Trade Management is used to create offers to provide discounts, which in turn uses Oracle Advanced Pricing.

7.7 Security

When a program is created, it must be approved by valid individual(s) within the vendor organization before a partner enrolls in it. Approvers are set up while creating a program type and can be designated by name or role. They receive either an e-mail or notification alerting them to review programs and approve them. When a program is submitted for approval, a notification is sent to the approver associated with the program type. A sequence is associated with approvers to route program approval requests sequentially. The Oracle Marketing Framework (AMS: Generic Approval Framework) is used to route approval requests, notifications, and get approvals.

For more information on the framework, see *Oracle Marketing Implementation Guide*.

Approvers should have the responsibility 'Workflow User Web Application' to enable them to approve or reject a program.

Setting Up Enrollments

This chapter provides information on setups required for Program Enrollments. Topics included are:

- [Section 8.1, "Overview"](#)
- [Section 8.2, "Setups"](#)
- [Section 8.3, "Profile Options"](#)
- [Section 8.4, "Concurrent Programs"](#)
- [Section 8.5, "Interaction with Other Modules"](#)
- [Section 8.6, "Security"](#)

8.1 Overview

Oracle Partner Management enables a partner to be part of a vendor's indirect sales force by enrolling into programs designed by the vendor. Programs provide a basis for vendors to effectively segment and manage partner interactions. Vendors can group programs to target certain partner segments. Enrolling into these programs provide the utility to simplify a partner's relationship with a vendor.

Partners can enroll into a program and can get a membership into the program. They can enroll into a program through the Available Programs Bin or enroll into programs that have been initiated by a distributor. This means that while creating the program, the distributor would have selected the option to be able to invite partners to enroll into programs.

During the enrollment process, the partner can review the contract template attached to a program and agree or disagree with the contract. The partner can also choose to print and fax or mail a signed copy of the contract later, and continue with the enrollment process.

8.2 Setups

The following sections provide information on setups that are required for Enrollments:

- [Section 8.2.1, "Setting Up Address Validation"](#)
- [Section 8.2.2, "Setting Up Oracle Order Management"](#)
- [Section 8.2.3, "Setting Up Oracle iPayment Server"](#)
- [Section 8.2.4, "Setting Up Runtime Variables"](#)
- [Section 8.2.5, "Setting Up Tax Rules"](#)
- [Section 8.2.6, "Setting Up Approvers using Oracle Approvals Management \(AME\)"](#)

8.2.1 Setting Up Address Validation

The receivables address validation system option needs to be set up as address validation is required for payment. Billing address is validated against tax locations that are set up in Oracle Receivables.

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

8.2.2 Setting Up Oracle Order Management

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

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

8.2.3 Setting Up Oracle iPayment Server

The Oracle iPayment server needs to be set up for using the credit card payment method.

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

8.2.4 Setting Up Runtime Variables

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

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

8.2.5 Setting Up Tax Rules

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

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

8.2.6 Setting Up Approvers using Oracle Approvals Management (AME)

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

Setting up Approver for Enrollment requests

This has to be done through Oracle Approvals Management module.

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

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

Attributes Tab

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

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

For example, a query for the Attribute COUNTRY.

Seeded attributes:

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

Conditions Tab

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

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

Approval Tab

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

Groups Tab

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

Rules Tab

1. Click the Rules tab and select the above transaction type from the drop-down. Click **Add a Rule**.
2. Enter a description and select Rule Type as list-creation-rule. Select the start date and end date appropriately. Click **Continue**.
3. Select Approval Type as 'Chain of authority includes an approval group and click **Continue**.
4. Select an Approval group from the drop-down and click **Continue**.
5. Select 'None' for constraints and click **Continue**.

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

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

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

Test Tab

In the Test tab, select your transaction type and select 'Create a test transaction'. Click **Continue** and select Requestor Type as 'None'. Click **Continue** and provide the same attribute value that you gave in the conditions tab and check for the rule you defined in the List-Creation Rule. Click **View Approver List** to view the approver list.

Admin Tab

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

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

8.3 Profile Options

Table 8–1 lists the profile options that need to be set up for Enrollments.

Table 8–1 Enrollment Profiles

Option	Required - Yes/ Optional	Level	Available setting choices	Description
PV: Default Enrollment Request Approver	Yes	Site/ Appli cation	-	When AME does not return an approver, the enrollment request would be in queue of this approver.
PV: Program Enrollment Request Reminder Notification Duration	Yes	Site/ Appli cation	15	Reminder duration in days. If action is not taken within this interval, reminder notification is sent after every interval.
PV: Allow Approval Without Contract	Yes	Site	Yes/No	Yes: During enrollment request approval, system allows the approver to approve the request even though the contract is not signed (online or hardcopy) by the partner. No: During Enrollment request approval, system does not allow the approver to approve the request if the contract is not signed (online or hardcopy) by the partner.

Table 8–1 Enrollment Profiles

Option	Required - Yes/Optional	Level	Available setting choices	Description
PV: Default Salesperson used for Orders	Yes	Site	Should be the salesperson name picked up from the LOV.	This person is associated while creating the order in Order Management for partner enrollment. You can select a dummy salesperson if you do not want the sales quota to be associated to this salesperson for partner enrollments.
PV: Order Cancel Reason	Yes	Site	All the available cancel reason codes from OM cancel lookup (CANCEL_CODE)	This profile option value is used as cancel reason when an order needs to be cancelled either because a partner user cancelled an enrollment request when he is in the payments section or because the approver rejected a enrollment request submitted by a partner.
PV: Non Shippable Order Transaction Type For Partner Program Enrollment Requests	Yes	Site	All the available transaction types for ORDER type (OE_ORDER_TYPES_V view)	Since the orders are non shippable and invoiceable orders, profile option value has to be one of the BILL ONLY transaction types with invoice option enabled. This is used as transaction type for creating orders.
PV: Max number of credit card authorization	Optional	Site	A number is expected	If the credit card authorization fails for these many times consecutively, the partner is not allowed to change payment information. If this profile value is not set, the number is defaulted to 3.
OM: Payment method for Credit Card Transactions	Yes	Site, Application, Responsibility, and user	Default method for credit card transactions	This credit card transaction method is used to figure out merchant ID from Receivables, which is required when getting credit card authorizations from iPayment.

Table 8–1 Enrollment Profiles

Option	Required - Yes/Optional	Level	Available setting choices	Description
PV: Secure URL	Optional	Site	This profile option needs to be set to secure server and port that should be used in payment pages	If this profile is set, payment pages use this secure (https) server and port. Otherwise, the regular port in payment page is used. Example of this profile option value: http://qapache.us.oracle.com:2000/OA_HTML/
PV: Non Secure URL	Optional	Site	This profile option needs to be set to non secure server and port that should be used after processing payment	If the profile is set, the server and profile mentioned is used to switch to non secure url once payment has been processed. Otherwise, the same port that is used in payment pages are used. Example of this profile option value: http://qapache.us.oracle.com:1111 /OA_HTML/

8.4 Concurrent Programs

Table 8–2 lists the concurrent programs that need to be run for Enrollments.

Table 8–2 Concurrent Programs

Concurrent Program	Description
PV: Send enrollment notifications to partner user	<p>This concurrent program sends out the following program related notifications to partners based on the program definition.</p> <p>Renewal notifications: This notification is sent out to partners if their membership is about to expire or has expired (based on program criterion).</p> <p>Contract not received: This notification is sent out to partners if they have opted to fax a copy of the partnership contract and the vendor has not received it within specified time period.</p>

Table 8–2 Concurrent Programs

Concurrent Program	Description
PV: Expire Ended Program Memberships, and Renew Early Renewed Program Memberships	This concurrent program updates the membership status to 'Expired' for all partner organizations with membership end date (for one or more programs) in the past of current system date, and updates the membership status to 'Renew' for all early renewals whose start date is in the past. After this program is run, if a global membership expires and if there are subsidiary program memberships, the subsidiary program memberships also expire.
PV: Process the errored enrollment requests for approval	Enrollment requests initiated by partners may not get routed for approval if the AME application errors out due to some reason. This concurrent program processes such enrollment requests and routes them to appropriate approver(s).
PV - Assign/Revoke user responsibilities	This concurrent program is used to assign or revoke responsibilities of partner users based on their organization's memberships. There is no fixed frequency.

8.5 Interaction with Other Modules

This section lists interactions with other Oracle Partner Management flows and other Oracle E-Business Suite products.

- Oracle Order Management - Oracle Order Management is used to process sales orders when a partner submits an enrollment request for a program that contains fees. It is used to process financial liabilities. Oracle Order Management is also used to process orders for different payment modes such as cash, check, credit card and purchase order.
- Oracle iPayment Server - If partners use the credit card payment mode to pay fees, the iPayment Server is used to process payment.
- Oracle Receivables - The payment billing address has to be validated against tax locations. For this, the address validation option in Oracle Accounts Receivables needs to be set up.
- Oracle Approvals Management - Approvers for enrollment requests are setup in Oracle Approvals Management.

8.6 Security

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

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

Prerequisites

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

Steps

1. Log into Oracle Forms as the channel administrator and navigate to Resource Manager > Maintain Resources > Resources.
2. Fill in the resource details, and find the resource.
3. Click **Resource Details**.
4. In the Roles tab, associate the above role by adding a new row with role type as Oracle Partner Management, and Role as Partner Vendor Administrator.
5. Save the details.

Setting Up Opportunity Assignment

This chapter provides information on setups required for Opportunity Assignment. Topics included are:

- [Section 9.1, "Overview"](#)
- [Section 9.2, "Setups"](#)
- [Section 9.3, "Profile Options"](#)
- [Section 9.4, "Concurrent Programs"](#)
- [Section 9.5, "Interaction with Other Modules"](#)
- [Section 9.6, "Seeded Data"](#)
- [Section 9.7, "Users and Security"](#)

9.1 Overview

A sales opportunity is a qualified sales opportunity. When an opportunity is created, it is assigned to one or more sales representatives based on territory definitions. New opportunities can originate from leads, marketing campaigns or can be manually entered. Sales representatives or channel managers can assign opportunities to partners.

Sales channels can be direct or indirect.

- Sales representatives from your organization can fulfill direct opportunities.
- You can route indirect opportunities to partners for fulfillment.

While routing an opportunity to a partner, you must be able to identify the most appropriate partner based on pre-defined rules or you can manually search for a partner based on their skills and expertise.

Automatic Partner Assignment

Oracle Partner Management provides an engine to identify the best partner(s) to fulfill each indirect opportunity by matching opportunity attributes with partner expertise. The engine can operate in a batch mode without requiring manual intervention or be manually invoked by the sales representative that decides to submit the opportunity to the partner.

Automatic Partner Search

To match partners to indirect opportunities, define partner matching rules. The highest matching rule is selected by the partner matching engine. Once you submit the assignment to a partner, the system starts a workflow process to notify the partner and the channel manager that an opportunity is assigned.

Manual Partner Search

You can manually match opportunities by selecting a preferred partner. While performing a manual search, you can use partner profile attributes to identify the best partner.

9.1.1 Routing Types

Oracle Partner Management supports several routing types:

- **Serial:** The system generates a list of partners. The opportunity is offered to one partner at the time. If the highest ranking partner declines it, the opportunity is offered to the second ranking partner and so on until a partner accepts it.

- **Single:** This is a subset of the Serial routing type. The opportunity is routed only to one partner.
- **Multiple Serial:** This is a variation of the single routing and you can create an ordered list of partners. The opportunity is offered to the first partner for review. If the partner accepts it, the assignment is successful. If the partner declines it, it is offered to the second partner in the list for review. You need to select at least two partners from the partner LOV window.
- **Multiple-Parallel:** You can also broadcast the opportunity to multiple partners for review at the same time. However, only the partner who accepts it first, wins the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner LOV window.
- **Joint:** This option supports collaborative selling. The opportunity is offered to multiple partners for fulfillment. The partners come together and bring their expertise to win the deal.

9.2 Setups

The following sections provide information on setups that are required for Opportunity Assignment:

- [Section 9.2.1, "Setting Up Partner Matching Rules"](#)
- [Section 9.2.2, "Setting Up Manual Matching Options"](#)
- [Section 9.2.3, "Setting Up Timeouts"](#)
- [Section 9.2.4, "Setting Up Channel Types"](#)
- [Section 9.2.5, "Setting Up Status Notification"](#)

9.2.1 Setting Up Partner Matching Rules

Automatic partner matching requires rules so that the system can make correct decisions.

This feature enables vendors to match partners to indirect opportunities based on partner matching rules. The rule can be selected by the partner matching engine based on the criteria specified in the opportunity selection section of the rule, or the rule can be decided based on the profile option 'PV: Rule for Automatic Matching'. The partners selected can then be added to the partner assignment list of an indirect opportunity and then routed to the partners using the routing process.

Use this procedure to set up rules.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Opportunity Routing > Partner Matching Rules.

The Partner Matching Rules page appears.

2. Click **Create**.

The Create Partner Matching Rule page appears.

3. Enter rule attributes such as name, start and end dates, precedence and select the currency.

The rule currency identifies the currency used for each currency condition that is added to the rule. The higher precedence rule is evaluated before lower precedence rules when the partner matching engine is trying to identify the most appropriate rule to apply for each opportunity.

If the default owner is not correct, select a different owner.

4. Click **Create** to display the Partner Matching Details page.

Navigate to the Edit Matching Rule page and access the following links:

- Opportunity Selection: For more information, see [Add Opportunity Selection Criteria to the Partner Matching Rule](#).
- Partner Selection: For more information, see [Add Partner Selection Criteria to the Partner Matching Rule](#).
- Matching Criteria: For more information, see [Add Matching Criteria to the Partner Matching Rule](#).
- Geo-Proximity: For more information, see [Add Geographic Proximity to the Partner Matching Rule](#).
- Tiebreak: For more information, see [Add Tiebreak Criteria to the Partner Matching Rule](#).
- Routing: For more information, see [Add Routing Information to the Partner Matching Rule](#).

9.2.1.1 Add Opportunity Selection Criteria to the Partner Matching Rule

Vendors can identify the most appropriate rule to apply for each opportunity, based on the conditions specified. Once the rule is identified, that rule is used to identify the matching partners based on the partner selection, matching criteria, geo-proximity and tiebreak.

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

Prerequisites

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

Steps

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

The values section can render as a text field, or as a table or as a table with a LOV option.

- If it is a text, enter appropriate values.

- If it is a table, check the values that you wish to add.
- If it is a table with an LOV option, use the LOV to add the values you need to add.
- 4. Click **Apply** to add this attribute or click **Apply And Add Another** to add this Attribute and display a new Attribute page.
- 5. Click **Cancel** to return to the Opportunity Selection page.

9.2.1.2 Add Partner Selection Criteria to the Partner Matching Rule

The conditions specified in the partner selection section, define the pool of partners after which one or more partners are selected based on matching criteria, geoproximity and tiebreak.

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

Prerequisites

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

Steps

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

Condition values: Is Not Null, Is Null

3. Select the appropriate condition.
4. The values section can render as a text field, or as a table or as a table with a LOV option.
 - If it is a text, enter appropriate values.
 - If it is a table, check the values that you wish to add.
 - If it is a table with an LOV, option use the LOV to add the values you need to add.
5. Click **Apply** to add this attribute or click **Apply And Add Another** to add this Attribute and display a new Attribute page.
6. Click **Cancel** to return to the Partner Selection page.

9.2.1.3 Add Matching Criteria to the Partner Matching Rule

This step helps vendors to refine the partner search. For example, the user can decide that the customer address has to be in the same state as the partner address or the customer industry needs to match the partner's target industry.

Once a rule is identified (via evaluation of opportunity selection) and the pool of partners defined (via evaluation of partner selection), the matching criteria section allows to specify how to use information from the opportunity as search criteria on partner profile to identify the best matching partner(s).

Use this procedure to add matching criteria to the rule. In this step, you relate attributes selected for the opportunity to attributes selected for the partner.

Prerequisites

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

Steps

1. In the Matching Criteria page, select an attribute from the drop-down list in the Opportunity Attribute column. The window refreshes as the Matching drop-down list is populated. The values in the Matching drop-down list are determined by the return type of the attribute selected in the Opportunity Attribute.
2. Select an operator from the Matching Condition drop-down list.

3. Select a related Attribute from the Partner Attribute column. Attributes displayed in the drop-down list of Partner Attributes are attributes that have the same return type as the attribute selected in the Opportunity Attribute column.
4. Repeat steps 3 through 5 to add additional Matching Criteria to the Matching Rule.
5. Click **Apply** to save your changes.

9.2.1.4 Add Geographic Proximity to the Partner Matching Rule

This step enables vendors to filter partners based on their proximity to the opportunity. It allows to limit the matched partners to the nearest ones or to show only partners within a given distance.

Use this procedure to assign a geographical region to the rule.

Prerequisites

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

Steps

1. In the Geographic Proximity page, enter a distance value in the Select Partner Within field.
2. Select a distance denomination of either miles or kilometers.
3. Enter a numeric value for the number of partners to select in the defined geographic proximity into the Select Nearest field.
4. Click **Apply** to save your changes

9.2.1.5 Add Tiebreak Criteria to the Partner Matching Rule

If the rules requires a single winner or a list of winners in an order, vendors can define tie breaks criteria. For example, they can decide that everything else being equal, they want to rank first the partner with the highest percentage of accepted opportunities.

Use this procedure to assign tiebreak criteria to the rule. The tiebreaking attribute is the attribute that is compared if the opportunity and one or more partners compare equally.

Prerequisites

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

Steps

1. In the Tiebreak page, enter a Rank number.
Attributes are compared in the rank order.
2. Select an Attribute from the drop-down list in the Partner Attribute column.
3. Click **Apply** to save your changes.

9.2.1.6 Add Routing Information to the Partner Matching Rule

This section of the rule is used if matching and routing of opportunities to partners is done automatically in the background.

Use this procedure to assign routing information to the rule.

Prerequisites

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

Steps

1. In the Matching Routing page, select a routing type for the rule.
The routing method determines how the opportunity is offered to partners on the list. For information on routing types, see [Routing Types](#).
2. Select the Bypass Channel Manager Approval check box in order to skip Channel Manager Approval for this Partner Matching Rule.
3. Enter the Channel Manager Timeout in Days or Hours.
4. Enter the Partner Timeout in Days or Hours.
5. Click **Apply** to save your changes.

9.2.2 Setting Up Manual Matching Options

For manual matching of partners, all active partner attributes that are enabled for matching are exposed by default on the manual search screen. Vendors can restrict this list by identifying partner attributes they want to expose at each responsibility level. Users whose current responsibility matches one of these responsibility levels can only see partner attributes that have been selected for this level.

Use this procedure to set up manual matching options at the responsibility level.

Prerequisites

None

Steps

1. Log in as the channel administrator and navigate to Opportunity Routing > Manual Matching Setup.

The Partner Matching Options page appears.

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

The rank determines the order in which the partner attributes are displayed in the manual search screen. Also, if the profile PV: Enable Partial Matching of Attributes is Yes, and partners are not found for the current search conditions, the lowest ranked condition is dropped and the search is performed again. This process continues until at least one partner is found or all the search conditions are exhausted.

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

This displays all the active partner attributes that are enabled for matching.

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

9.2.3 Setting Up Timeouts

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

- Channel Manager Timeout
- Partner Timeout

Channel Manager Timeout: Limits the time period a channel manager can hold a matched opportunity before it is forwarded to the assigned partner. If the channel manager does not process the opportunity, the routing status is automatically changed to Offered and the opportunity is routed to the partner.

Partner Timeout: Limits the time period during which a partner can respond to an offered opportunity before it is recycled and offered to another partner.

Use this procedure to set up timeouts.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Partner > Timeout Setup > Timeout Setup page.
2. Select a timeout type from the Timeout Type drop-down list.
The values are Channel Manager Timeout and Partner Timeout.
3. Select a country from the Country drop-down list.
4. Enter a value in the Timeout Period field.
5. Select the Remove check box to delete any existing timeouts.
6. Click **Upgrade** to save your changes.

9.2.4 Setting Up Channel Types

You can create your own channel types to reflect your business processes. Oracle Partner Management seeds several channel types. For each channel type, you must define which are your direct and indirect channels. This setup is used by the lead engine and partner matching engine to identify which opportunities are indirect and should be assigned to partners.

This setup allows vendors to flag each sales channel as either direct or indirect.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Opportunity Routing > Channel Setup.
The Channel Setup page appears.
2. Select a sales channel from the Channel drop-down list.
3. Select the Indirect check box to make the channel available for Oracle Partner Management.
4. Enter a value in the Precedence column to rank channels for the purposes of tiebreaking.

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

9.2.5 Setting Up Status Notification

Oracle Partner Management provides a built-in workflow system that triggers automatic e-mail notifications to certain groups of people (as determined by their assigned role) at different stages in the opportunity and routing process. Notifications are sent out to the following users whenever the status changes.

The various user types are:

- Channel manager
- Assignment Manager - User that initiates the opportunity routing to partner.
- Partner - Partner contacts on the opportunity sales team.
- Other - Internal sales representatives that are neither channel managers nor assignment managers.

Note: The system checks for the appropriate e-mail address in User Registration (under administration). This is a mandatory requirement for the status notification to work. In addition, while creating users, please ensure that appropriate roles are defined. This means that at least one partner contact should have the permission: OPPTY_CONTACT. This permission is assigned by default to the user who registers the partner organization.

Use the following procedure to set up status notifications.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Opportunity Routing > Status Notifications.

The Status Notification page appears.

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

The values are Opportunity and Routing.

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

4. Select if the following should receive notification upon a change in status:
 - Partner
 - Channel Manager
 - Assignment Manager
 - Others
5. Select the Remove check box to remove any status notifications.
6. Click **Apply** to save your changes.

9.3 Profile Options

Table 9–1 lists the profile options that need to be set up for Opportunity Assignment.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Partner Matching Type	Optional	-	Default is 'Stop at first rule' at site level	<p>Possible Values:</p> <p>Exhaust all rules -The partner matching engine evaluates each rule (that matches the conditions specified in the 'Opportunity Selection' section of each rule), by order of precedence, until it finds a partner. If there was a preferred partner specified on the opportunity, the evaluation stops at the first rule regardless of whether the first rule evaluated returned any partner.</p> <p>Stop at first rule - The partner matching engine, after finding a rule that matches the conditions specified in the Opportunity Selection of that rule, uses only that rule in finding partners.</p>

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Enable Full Access on Opportunity to Partner	Optional	Site	Yes	<p>This profile is used to determine whether partner contacts are added to the opportunity sales team with full access or read-only access during opportunity routing.</p> <p>If set to 'Yes', the partner, after accepting the opportunity can update the opportunity details.</p> <p>If set to 'No', the partner user has read-only access to the opportunity. In addition, the partner can create notes and add attachments.</p>
PV: Active Notification Flag	Optional	User	Yes/No	<p>User can enable or disable notifications when the partners accepts an opportunity.</p> <p>If set to Yes, the partner contact receives a notification when the routing status changes from Offered to Active.</p>
PV: Bypass CM Approval for Campaign Routing	Yes	Site	Yes/No	Determine whether channel manager approval is required for partners matched by a campaign. This profile option is used along with PV: Enable Automatic Routing by Campaign. The default value is No.
PV: Common Currency for Rules Engines	Yes	Site	Any available currency	<p>Base currency used for currency comparison in partner matching. If the currency specified for the rule is not the same as the base currency, it is converted to the base currency and then the comparison is performed. This profile is also used by the concurrent program PV Refresh Attribute Text Table.</p> <p>The default is USD.</p>
PV: Default Batch Assignment User	Optional	Site	A User	This user is added to the sales team of an opportunity which failed to complete the full automated background Lead to Opportunity to Routing process.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Default CM TimeOut	Optional	Site	# of Hours	Default channel manager timeout in hours if not specified at the country level. Sets the time period available to channel managers to review and approve partner matching and selection. If the channel manager does not respond in the given time, the default response is Match Approved.
PV: Default Partner TimeOut	Optional	Site	# of Hours	Default partner timeout in hours if not specified at the country level. Sets the time period available to Partner Contacts to accept the offered opportunity. If no response, the default response is Offer Declined.
PV: Default Routing Type	Yes	Site	Single Multiple-Serial Multiple-Parallel Joint	Default assignment type used by the background partner routing. Partners default assignment type. The default type is Single.
PV: Default Unassigned Opportunity TimeOut	Optional	Site	# of Days	Sets the time period an unassigned opportunity may have the 'Unassigned' routing status. At the expiration of the time period, a concurrent manager program, PV Unassigned Opportunity Process After Timeout, performs automatic matching and routing.
PV: Default Vendor User (Channel Manager)	Optional	SAR	-	Default channel manager used if none found for partner.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Default for Bypass Channel Manager approval checkbox	Optional	-	-	Determines the display of the Bypass channel manager approval flag on the opportunity assignment page. Possible Values: Bypass CM - Allow update Bypass CM - No Update Allowed Do not Bypass CM - Allow Update Do not Bypass CM - No update Allowed
PV: Display Submit Routing Button	Optional	All	Yes/No	Enable and disable ability for user to submit or withdraw assignment routing. When set to Yes, a Submit Routing button is displayed on the opportunity assignment page. This profile is not available to partner users. The default is No.
PV: Enable Automatic Routing by Campaign	Optional	Resp	Yes/No	Enables automatic routing based on campaigns. When the campaign field is completed, the system adds associated partners to the sales team, opportunity routing list and starts the routing process. The default is No.
PV: Enable Partial Matching of Attributes	Optional	All	No	Enables the partner matching engine to return partners even if an exact match is not found for manual matching. The algorithm used is: if no partners are returned for the search conditions specified, the lowest ranked condition is dropped and the engine performs the search again. This process continues until at least one partner is found or all the search conditions are exhausted.
PV: Enable Workflow to send e-mails	Yes	Site	Yes/No	Enable or disable notifications in indirect opportunity management.

Table 9–1 Profile Options

Option	Required -Yes/Optional	Level	Setting	Description
PV: Enforce Address Filters in Partner LOV	Yes	Site	Yes/No	If set to Yes, the partner LOV allows to search based on partner name and address.
PV: Java Class to Restrict ORG Access Privilege	Optional	Site	Java Class Filename	Customizable Java Class is available to restrict partners from accessing customer details from the opportunity pages by clicking the customer link.
PV: Locator Default Distance Unit	Yes	All	Distance Unit	Default distance unit for manual search. Also used for automatic matching if rule selected did not specify distance unit. This is also used by the reseller locator. The default value is Mile.
PV: Locator Distance	Yes	All	Numeric Value	The Reseller Locator searches for partners within this distance (default at site level is 10).
PV: Locator Maximum No of Partners	Yes	All	Numeric Value	The maximum number of partners returned when Reseller Locator is searching for partners. The default value for site is 15. The default value for others is 20.
PV: Locator Partners Per Page	Yes	All	Numeric Value	The number of partners displayed per page. The default value is 10.
PV: Locator Proxy Port	Yes	Site	-	Proxy server port. The default value is 80.
PV: Locator Proxy Server	Yes	Site	-	Proxy server address. The default value is <code>www.proxy.us.oracle.com</code> .
PV: Locator Server Timeout	Yes	All	Time in milli seconds	Timeout for the Elocation Request used in reseller locator. The default value is 20000 milliseconds.
PV: Locator Skip eLocation Server	Yes	Site	Yes/No	If Yes, the system does not use the eLocation server and performs geoproximity analysis based on radial distances only.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Matched Notification Flag	Optional	User	Yes/No	User can enable or disable the notification when an opportunity is matched. If set to Yes, the user receives an e-mail notification when an opportunity is matched with a partner. The default is Yes.
PV: Matching Rule Selected by Engine	Yes	User	Yes/No	If set to Yes, the matching rule is selected by the Rules Engine in automatic matching. The default value is No. See Profile PV: Rule for Automatic Matching.
PV: Max Number of Matched Partners	Yes	Site	-	Maximum number of partners returned during partner matching (manual and automatic). If the value is not specified, the number of partners returned is 10.
PV: Offered Notification Flag	Optional	User	Yes/No	If set to Yes, the user receives an e-mail notification when an opportunity routing status changes to Offered.
PV: Require Opportunity Contact for Manual Routing	Optional	Resp	Yes/No	Do not allow, or allow assignment routing if there are no opportunity contacts. When set to Yes, a contact name for the opportunity is required for manual and batch routing to start. If set to No, a contact name is not required. The default is No.
PV: Restrict Sales Team Partner Contact LOV	Optional	Site	Yes/No	For customer external sales team, if 'Yes', restrict the display of contacts to those partners that the sales team member can access.
PV: Rule for Automatic Matching	Yes	User	Yes/No	If the profile, PV: Matching Rules Selected by Engine is set to No, this profile is used to determine which rule to use for automatic matching.
PV: System Login URL	Optional	Site	URL	The system login URL to be displayed in e-mail notifications.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
PV: Trace for Auto Matching	Optional	All	Yes/No	If set to Yes, automatic partner assignment process trace is displayed in the UI for debugging. The default value is No.
PV: Unassigned Notification Flag	Optional	User	Yes/No	If set to Yes, user receives a notification for a new opportunity with routing status 'Unassigned'. The default is Yes.
PV: Withdrawn Notification Flag	Optional	User	Yes/No	If set to Yes, the user receives an e-mail notification when an opportunity routing status changes from 'Offered' to 'Withdrawn'. The default is Yes.
Applications Server-Side Proxy Host and Domain	Optional	Site	-	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Spatial Provider URL	Yes	All	A URL	A URL for Spatial Information on Location (Default at site level is http://elocation.oracle.com/elocation/lbs). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Web Server Proxy Host Name	Optional	All	Web Server Proxy Name	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Web Server Proxy Port	Optional	All	Web Server Proxy Port	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
OS: Auto Convert Lead to Opportunity	Yes	Site	Yes/No	If Yes, the system converts indirect leads to opportunities and performs automated rule-based partner assignment.

Table 9–1 Profile Options

Option	Required -Yes/ Optional	Level	Setting	Description
OSO: Default Sales Group and Role	Yes	Site	User Defined	Default Sales Group and Role For more information, see the Oracle Sales Online Implementation Guide.
OS: Opportunity Access Privilege	SRU	Site	Full	This profile drives the behavior of opportunity access. This profile is defined within the Sales Application. It should be set to sales team as the partner should only be allowed to see opportunities where they are on the sales team.
PV: Locator Server URL	Yes	Site	http://elocation.oracle.com/servlets/lbs	PV Locator URL used to get the elocation service
PV: Locator TCP Request Content Type	Yes	Site	application/x-www-form-urlencoded	Locator TCP request content type
PV: Skip Elocation for Partner Matching Service	Optional	SARU	-	If 'Yes', system skips eLocation server and perform geo-proximity analysis based on radial distances only. If value is not set, the system defaults to 'No'.
PV: Unassigned Opportunity Timeout (Days)	Yes	Site	10	Number of days indirect Opportunity has stayed unassigned. Used by concurrent program 'PV - Unassigned Opportunity process after timeout'
PV: Abandon Notification flag	Optional	User	-	User can enable or disable notification when opportunity is abandoned. Default to 'Yes'.
PV: Recycled notification flag	Yes	User	-	User can enable or disable notification when the opportunity is recycled. Default to 'Yes'.

9.4 Concurrent Programs

Table 9–2 lists concurrent programs that need to be run for Opportunity Assignment.

Table 9–2 Concurrent Programs

Name of the program	Required - Yes or Optional	Description
PV Unassigned Opportunity Process After TimeOut	Optional	<p>This concurrent program invokes the partner matching engine to route indirect opportunities to partners for those indirect opportunities that have been left unassigned more than 'n' days since the opportunity was created.</p> <p>The timeout period is based on the profile 'PV : Unassigned Opportunity Timeout. (Days)</p> <p>The parameters of the concurrent program are:</p> <p>Country - Only process opportunities for country specified.</p> <p>User Name - The user that is considered as the assignment manager for the opportunity routing.</p> <p>From Date - Only consider opportunities that have been created after this date.</p>
PV - Initial Build for Partners Open/Won Opportunities	Yes	<p>This program builds or rebuilds the materialized view to display the Opportunity Open and Won Bin.</p> <p>The parameters of the concurrent program are:</p> <p>No_of_process - For systems with multiple CPUs, this sets the number of parallel database processes that is started to build materialized views.</p> <p>Next_extent - Database extent size to allocate whenever more space is needed to store the data.</p>

Table 9–2 Concurrent Programs

Name of the program	Required - Yes or Optional	Description
PV Refresh of Partner Opportunity Bin Data	Yes	<p>This program refreshes the materialized view to display the Opportunity Open and Won Bin.</p> <p>The concurrent program PV - Initial Build for Partners Open/Won Opportunities needs to be run at least once to set up the materialized views prior to first execution of this concurrent program.</p>
PV Update Referral/Deal Status	-	This concurrent program records interactions for orders that are placed from an opportunity.
Spatial Information for Locations Batch Update	Yes	<p>Acquire latitude and longitude values for locations in the TCA registry.</p> <p>For addresses that already have spatial data, the program updates the records with the latest information from eLocation. (For more information, see <i>Oracle Trading Community Architecture eLocation Spatial Data Integration User Guide</i>.) This is needed for partner matching to determine the radial distances between a customer on the opportunity and the partners.</p>
Workflow Background Process - POL Assignment Routing	Yes	<p>Process channel manager time-out and partner time-out activities in opportunity routing.</p> <p>The parameters of the concurrent program are:</p> <p>Item_type: POL Assignment Routing</p> <p>Process Deferred: N</p> <p>Process Timeout: Y</p> <p>Process Stuck: N</p>

Table 9–2 Concurrent Programs

Name of the program	Required - Yes or Optional	Description
Workflow Background Process - POL Automated Partner Matching	Yes	<p>When a lead is created, and the channel selection engine selects an indirect channel, based on the profile 'OS: Auto Convert Lead to Opportunity', the lead gets converted to an indirect opportunity and a workflow process is created to call the automatic partner matching or routing.</p> <p>This concurrent program starts the workflow process to initiate the automated partner matching and routing of converted opportunities to partners.</p> <p>Item_type: POL Automated Partner Matching</p> <p>Process Deferred: Y</p> <p>Process Timeout: N</p> <p>Process Stuck: N</p>
Workflow Background Process - POL NotifyParty	Yes	<p>Send e-mail notifications to channel managers when partner creates opportunities.</p> <p>The parameters of the concurrent program are:</p> <p>Item_type: POL Notify Party</p> <p>Process Deferred: Y</p> <p>Process Timeout: N</p> <p>Process Stuck: N</p>

Table 9–2 Concurrent Programs

Name of the program	Required - Yes or Optional	Description
PV: Refresh Partner Trend Values	Yes	<p>Updates partner trend values to enable up to date attribute matching. Retrieves or calculates the partner trend performance measures summarized at a monthly level.</p> <p>The parameters of the concurrent program are:</p> <p>Start from Beginning of Month - Identifies the starting month to refresh (only applies to measures that are cumulative). Non-cumulative measures are always calculated for the current month only.</p> <p>To Ending of Month - Identifies the ending month to refresh (only applies to measures that are cumulative). Non-cumulative measures are always calculated for the current month only.</p> <p>New Partners Only - If 'Yes', then only process for new partners. New partners are defined as partners created after the last refresh run of this concurrent program (stored in the profile 'PV: Partner Trend Last Refresh')</p> <p>Ignore refresh interval - If 'Yes', process all attributes even though the time interval from the last refresh have not exceeded the refresh interval set for some attributes.</p>
PV Refresh Attribute Text Table	Yes	<p>Allows the attribute details for a particular partner to be used in the matching process and to calculate the 'performance' and 'derived' attributes for each partner.</p> <p>There are two options for running this program: full refresh or new partners only refresh.</p> <p>Full refresh is the default.</p> <p>The 'New partners only' option picks up all the newly created partners since the last refresh of this type. The last refresh date is stored in the profile 'PV: Refresh Search Attributes Last Update Date'.</p>

9.5 Interaction with Other Modules

This section lists interactions with other Oracle Partner Management flows and other Oracle E-Business Suite products.

- Oracle Sales Online - Opportunity management for partners leverages the Sales Online opportunity module to support the assignment of indirect opportunities to partners.
- Oracle Leads Management - When the lead engines identify the channel as indirect, the lead is automatically converted into an opportunity and routed to the partner either manually or automatically.
- Oracle Marketing - Users can create, execute an email campaign schedule as well a web campaign schedule to target partners. For campaigns targeted at partners that result in indirect opportunities, Oracle Partner Management supports the ability to automatically assign the opportunities generated through a shared marketing campaign to the partner.

9.6 Seeded Data

Oracle Partner Management supports the ability to write interactions into a table visible to channel managers in the channel manager dashboard. The list of events that are tracked in the interaction table are:

- Indirect opportunity status change: Opportunity status changed to <opportunity status>.
- Indirect opportunity is matched to partners: Opportunity routing status changed to <opportunity routing status>. Opportunity matched to <partner name(s)>.
- Indirect opportunity is offered to partners: Opportunity routing status changed to <opportunity routing status>. Opportunity is offered to <partner names>.
- Indirect opportunity is accepted by partner: Opportunity routing status changed to <opportunity routing status>.
- Indirect opportunity is withdrawn by vendor: Opportunity is withdrawn.
- Indirect opportunity is abandoned by partner: Opportunity is abandoned.
- Indirect Opportunity is closed as lost: Opportunity status changed to 'Closed-Opportunity Lost'.

- Indirect Opportunity is closed as won: Opportunity status changed to 'Closed-Opportunity Won'.
- Order is placed from won direct/indirect opportunity: Customer <customer name> placed order for opportunity <opportunity number>.

9.7 Users and Security

Access to opportunities are restricted by user types and permissions.

User Types

- Vendor User - These are employees in the vendor organization who can view opportunities they have created and opportunities they have access to, because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners.
- Vendor Manager - These are employees in the vendor organization who can view, update and approve an opportunity assignment.
- Vendor Administrator - These are employees in the vendor organization who can perform system setup activities.
- Partner User - These are employees in the partner organization who can view and accept opportunities.
- Partner Administrator - These are employees in the partner organization who can view and accept all opportunities owned by their organization.

For information on setting up vendor users, see [Section 6.2.1, "Creating a Channel Manager"](#).

For information on setting up partner users, see [Section 3.3.2, "Creating a Partner"](#).

Permissions

- A partner contact must have the PV_OPPTY_CONTACT permission to be able to accept an offered opportunity.

Setting Up Referral Management

This chapter provides information on setups required for Referral Management. Topics included are:

- [Section 10.1, "Overview"](#)
- [Section 10.2, "Setups"](#)
- [Section 10.3, "Profile Options"](#)
- [Section 10.4, "Concurrent Programs"](#)
- [Section 10.5, "Lookups"](#)
- [Section 10.6, "Interaction with Other Modules"](#)
- [Section 10.7, "Dependencies"](#)
- [Section 10.8, "Users and Security"](#)

10.1 Overview

Referral Management enables partners to refer business opportunities to the vendor, which partners cannot fulfill directly. For example, the customer is interested in a product that the reseller does not sell. Partners can submit a referral to the vendor and receive a percentage of the revenue.

When partners submit a referral, it is routed to the appropriate approver(s). Approvers are notified of the referral and they review it and approve, reassign or decline it. When the referral is approved, a claim is generated after the order is shipped to the customer. After the claim is approved internally, partners receive notifications to review and accept compensation. After partners accept the compensation, the vendor pays the commission.

Vendors and partners receive notifications about referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by vendors and sent when the status changes, for example, when a referral is approved.

Vendors and partners can access a summary list of referrals that they have access to. They can build personal views to quickly find referrals that they are most interested in.

10.2 Setups

The following sections provide information on setups that are required for Referral Management:

- [Section 10.2.1, "Setting Up Budgets"](#)
- [Section 10.2.2, "Setting Up Offers"](#)
- [Section 10.2.3, "Setting Up Claims"](#)
- [Section 10.2.4, "Setting Up Referrals as Benefits"](#)
- [Section 10.2.5, "Defining Profile Attributes for the Referral"](#)
- [Section 10.2.6, "Defining Product Categories"](#)
- [Section 10.2.7, "Defining Territories"](#)
- [Section 10.2.8, "Defining Notification Messages for the Referral"](#)
- [Section 10.2.9, "Setting Up Notes for a Referral"](#)
- [Section 10.2.10, "Setting Up Approvers in Oracle Approvals Management"](#)

- [Section 10.2.11, "Setting Up Rules Using DQM Tools"](#)

10.2.1 Setting Up Budgets

To compensate a partner, you must calculate the compensation and then source it from the budget defined in the referral benefit. Accruals are made against budgets that are associated with the referral benefit from which the referral was made. Budgets are fixed budgets and have to be active in order to be selected in the referral benefit. Accruals are created for each order line that match between customer orders and referred products submitted.

A budget is a pool of money, which vendors can use to execute trade promotion activities such as offers and campaigns. For a fixed budget, they must decide maximum funds that it can include.

Use the following procedure to create a fixed budget.

Prerequisites

A set of books must be defined.

Steps

1. Log into Oracle Trade Management as the Oracle Trade Management Super User and navigate to Budget > Budgets.
2. Click **Create** and select Fixed Budget from the Setup Type drop down list.
3. Enter a budget name and a budget number.

If you leave the budget number field blank, a unique budget number is automatically generated. The budget name and budget number are used to identify the budget.

4. Select a business unit.

Business units are organizations, which are set up in Oracle Human Resources with Type = Business Unit. It is used mainly for classification purposes. It can also affect approval rules.

5. Optionally select a parent budget name.

Selecting a parent budget name makes the current budget a child of the parent budget, thus establishing a budget hierarchy.

The budget type defaults from Setup Type. For example, if you have selected the Setup Type as Fixed budget, then the value "Fixed" is defaulted here.

6. Select a budget category from the Category drop-down list.

Budget categories are set up in Administration and can be used to classify budgets. If Oracle General Ledger (GL) accounts are associated, and if a profile for displaying GL accounts is set, the GL accounts default on to the budget. In addition, an approval rule for a budget may use budget category as one of its criteria.

7. In the Budget Amount field, enter the amount of money that is set aside for this budget.

By default, the Currency field, displays the functional currency of the set of books. You may change it to another currency.

8. Optionally, in the Holdback Amount field, enter the amount you would like to reserve and not allocate down to lower levels. You may choose to reserve or release the holdback amount at any time. To release the holdback amount at a later point of time, you can manually reduce the amount that you had originally entered as holdback amount, and click **Update**.

The Owner field, by default displays the name of the user entering the budget details.

9. Optionally select the Start Date and End Date.

These dates are mapped in the GL calendars, and limits start and end dates of the budget.

10. Select the Start Date, and the End Date, and optionally enter a description for the budget.

11. Click **Create**.

10.2.2 Setting Up Offers

For information on setting up offers, see the *Oracle Trade Management User Guide*.

10.2.3 Setting Up Claims

For information on setting up claims, see the *Oracle Trade Management User Guide*.

10.2.4 Setting Up Referrals as Benefits

Use this procedure to set up a referral as a benefit.

Prerequisites

For a benefit to become active, the following items must exist:

- At least one budget line with the requested amount
- Offers
- At least one product category
- At least one territory
- A net accrual offer which is created in the background based on the above items

Steps

1. Log in as the channel administrator and navigate to Programs > Benefits > Benefit Administration page.
2. Select 'Referrals' benefit from the Create Benefit LOV and click **Go**.
3. Enter a benefit name, select a sales transaction from the drop-down list and select a benefit currency from the drop-down list.
4. Enter a budget in the Budget region.

The user makes a request when activating the benefit. The budget request will undergo budget validation process.

The budget amount is the amount from where compensation is sourced. The budget LOV displays 'fixed' and 'active' budgets whose team access includes the group that the current user belongs to.

5. Enter details in the Additional Details region.

In this section you can collect additional questions to evaluate the referral and automatically populate fields for the lead or opportunity that is generated upon referral approval. For each question that you add, specify the following:

- Label - This is the label displayed in the referral details under the additional details section when the partner is creating a referral.
- Profile Attribute - Select a profile attribute. The profile attributes LOV displays attributes that you defined to be valid for referrals in the Attribute Creation screen.
- Order - The order in which you want to present the questions.
- Mandatory - Indicates a mandatory field. The partner needs to populate all mandatory fields when submitting a referral.

For information on how to create your own questions, see [Section 10.2.5, "Defining Profile Attributes for the Referral"](#).

6. Enter product category and compensation amounts in the Products region.

The referrals created under this benefit setup are restricted to the product categories specified here.

- Compensation Percentage - Specifies the referral compensation to be paid out to the partners based on a percentage of the net sales amount.
- Maximum - Sets a cap on the referral compensation on a product-by-product basis. For a specific product, the referral compensation for the referral cannot exceed this amount regardless of the compensation percentage specified.

7. Enter geographic territories in the Territories region.

A country or groups of countries (regions) are geographic territories which are defined in the Territory Manager module of Oracle Trade Management. The geographic territories restrict the customers that can be referred to specific (countries) as specified in the benefit.

When a referral is set up as a benefit, geographic regions and the minimum threshold amount for each region should also be defined. The referred products' total amount should be greater than or equal to the threshold amount.

8. Define notifications in the Notifications region.

Notifications are sent regarding the activities on a referral. They can be linked for any status of a referral. The following notifications are seeded:

- Acceptance Letter/Referral Commission - Partner Notification
- Referral Accepted - Partner Notification
- Referral Approved - Requires Customer de-duplication Vendor notification
- Referral Created - Partner Notification
- Referral Created - Vendor Notification
- Referral Declined - Partner Notification

For information on how to create your own notification messages, see [Section 10.2.6, "Defining Product Categories"](#)

For each referral status that you want to attach a notification, specify the following:

- Status - Referral status change that requires notification.
- User Role - Group of users that needs to be notified for the corresponding status change.
- Notification Name - The workflow notification to use when sending notifications.

9. Click **Apply** to save the benefit. Click **Activate** to start the validation process.

The benefit creation process may go through one of the four benefit statuses: Active, Inactive, Draft, Failed Validation. When the process completes, the status is updated to Active or to Failed Validation.

When a benefit is created, it can be saved in the draft status by clicking '**Apply**'. At this point, no validation is done on the budget. When the user clicks **Activate**, a Net Accrual Offer is created in the background and budget validation is performed on the offer. Budget validation involves ensuring that the products and territories information specified in the benefit setup screen correspond and fall under their counterparts specified in the budget. Budget validation also ensures that each of the budget requests has a valid amount. If any one of the above items failed the validation, the benefit status becomes 'Failed Validation'. Otherwise, it becomes 'Active'. When the benefit status becomes 'Failed Validation', it can still be re-activated by correcting the failed item(s) and reapplying the changes. This process can be repeated until the benefit becomes active.

Once a benefit becomes active, the following conditions hold:

- Budget lines cannot be removed, but new lines can still be added.
- Products and territories can neither be removed nor added.
- New Additional detail lines cannot be added.
- New notification lines can be added.

10.2.5 Defining Profile Attributes for the Referral

Once vendors define attributes for the referral, they can associate a question with the attribute. They can setup questions for the referral to track extra fields on the referral and automatically populate the fields on a lead or opportunity. In addition, the partner responses to some of these questions transfer over to the lead or opportunity.

[Table 10-1](#) lists attributes that are seeded and can be added to a referral benefit.

Table 10–1 Questions

Question	Map to Opportunity	Map to Lead
Industry	-	-
Source (Campaign)	X	X
Number of users	-	-
Opportunity Description	-	-
Opportunity Size	-	-
SIC	-	-
Total employees	-	-
Information Verified	-	-
Customer Annual Revenue	-	-
Time Frame (Purchase Timeframe)	-	X
Budget Status	-	X
Total Budget	X	X
Response Channel	X	X
Sales Stage	X	-
Close Date	X	-
Offer	X	X

Additionally, the vendor can create their own set of questions. Use this procedure to define profile attributes for the referral.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Partner > Profile Attributes page.
2. Click **Create**.
3. In the Create Attribute page, enter the following required information:

1. Attribute Type - Select either 'List of Values' or 'Text Box'. Do not select 'Derived'.
2. Display Style - This depends on the attribute type that was selected. Based on the display style selected, the UI may present additional details that need to be updated.
3. Enter a name, description and set the category to 'General'. This is not used but needs to be set.
4. Set the status to 'Active'.
5. Select the 'Lead Referral' checkbox under 'Related to' and set everything else at the default.
6. Click **Create**.

10.2.6 Defining Product Categories

When a partner submits a referral, the product categories that the partner can refer depend on the benefit setup. Product categories need to be defined in the form of a hierarchy that are relevant for the referral. This information is used as the basis for approving a referral, identifying orders that directly result from a referral, and computing the compensation amount due to the partner.

For information on defining product categories, see *Oracle Advanced Product Catalog User Guide*.

10.2.7 Defining Territories

Territories are defined in Oracle Territory Manager with the transaction type 'Offers'.

Use this procedure to define territories.

Prerequisites

None.

Steps

1. Log in to Oracle Forms as a CRM Administrator and navigate to Territory Manager > Territory Administration.

The navigator window displays available territories.

2. Select Oracle Trade Management territory and navigate to Administration > Define Territory.

3. Enter 'Oracle Trade Management' in the Usage field.

4. Enter a name for the territory in the Name field.

5. Select 'Offer' as the Transaction Type and save the details.

The territory is saved.

6. In the Transaction Qualifiers tab, enter values in the Name, Operator and Value From fields.

The Qualifiers page appears. Oracle Partner Management supports only the 'Country' qualifier.

7. Save your details.

The territory is saved with all the qualifiers and resources.

10.2.8 Defining Notification Messages for the Referral

E-mail notifications are handled by Oracle Workflow. Some of the notification messages are defined using the Oracle Workflow Builder tool and some of the notification messages are seeded.

Use this procedure to define notification messages.

Prerequisites

None

Steps

1. Launch the Workflow Builder 2.6 client application. Ensure that the access level is set to 100. Verify this in Help > About Oracle Workflow Builder 2.6. This ensures that the customization is preserved.
2. Navigate to File > Open > Database radio button. Enter the apps login and database connection and click **OK**.
3. In the Show Item Type popup window, select Referral Benefit Workflow and click **OK**.
4. Expand the Messages Node and see notification messages that have been seeded for Referral Management.

5. At this point, you can copy an existing message to use as your new message. You can reference any attribute that has been seeded out of the box in the message template.

Important: The Internal Name you give your message has to conform to the naming convention of REFERRAL STATUS CODE#### where #### is a 4 digit number starting with 1000. For example, DECLINED1001.

6. Save your changes and exit. You should see your newly defined workflow message appear in the notification section of the referral benefit.

10.2.9 Setting Up Notes for a Referral

To set up notes, you must set up:

- Note Types
- Note Mapping

Oracle Partner Management has seeded a new source to associate note types to referrals.

For more information, see the *Oracle Application Foundation Implementation Guide*.

Partners can only create public notes. Vendor users can decide to create private, public or publish notes.

When approvers approve, decline or reassign the referral, they can add their reasons for doing so, provide comments and subsequent approvers can see these comments in the Notes fields. Vendors can set up the security on the comments to enable partners to see the comments or keep it private where only vendors can view comments.

The settings are:

1. Public: Other vendor users can see comments.
2. Publish: Partner users and other vendor users can see comments.
3. Private: Only vendor users can see comments.

10.2.10 Setting Up Approvers in Oracle Approvals Management

The first step of the approval process is to validate information entered by the partner. Approvers are internal employees or vendors that are defined in Oracle Approval Management (AME). Approvers are assigned to review referrals and do the following:

- Check for duplicate referrals and approve or decline a referral. They are set up in AME and notified based on rules defined in AME.
- Check for duplicate customers and contacts for their assigned referral. They are set up in DQM and notified to review the referral.

When the approver receives a notification, he/she reviews the referral and searches for duplicate referrals and approves or declines the referral. Before approving the referral, the approver checks if the referral matches any existing referral, lead and opportunity.

Use this procedure to set up approvers.

Prerequisites

None.

Steps

1. Log in to the self-service application as an Approvals Management Application Administrator and navigate to Approvals Management Application Administrator > Approvals.

The Approvals Management page appears. Click the Conditions tab.

Conditions tab

1. In the AME page, select the 'PV: Referral Management Approvals' transaction type and click **Continue**.

The Conditions page appears.

2. Click **Add a Condition**, select the 'Ordinary' option and click **Continue**.
3. Select the 'Customer Country' attribute and click **Continue**.
4. Click **Create Condition**.
5. Click the Groups tab.

Groups tab

1. In the Create an Approval group page, enter a name, description and static option.
2. Click **Create Group**.
A group is created.
3. Click **Add Approver** and search for an approver.

4. Click **Search**.

The approvers matching the search criteria appear.

5. Select an approver and click **Continue**.

6. Click **Create Member**.

An approver is added and edit approval group page appears.

7. Click **Quit**.

An approval group is created with an approver.

8. Click the Rules tab.

Rules tab

1. Select 'PV: Referral Management Approvals' transaction type and click **Continue**.

The Rules page is appears.

2. Click **Add Rule and Usage** and enter a description, Rule Type - list-creation, Start Date - current date, End Date - none.

The Add a Rule-Step 1 page appears.

3. Click **Continue**.

The Add a Rule-Step 2 page appears.

4. Select the 'chain of authority includes an approval group' option and click **Continue**.

The Add a Rule-Step 3 page appears.

5. Select the approval group created above from the LOV and click **Continue**.

The Add a Rule-Step 4 page appears.

6. Select 'Customer Country' in the 'Ordinary-Condition Attributes' multi-select field, and click **Continue**.

The Add a Rule-Step 5 page appears.

7. Select 'Customer Country is true' in the 'Ordinary Conditions' field, and click **Continue**.

A rule is created and the approval setup is complete. When a referral is sent to the approvals engine from the lead referral module, it processes the rule

defined for lead referral in the system and returns the approver according to the approver type chosen.

Table 10–2 lists AME attributes to define conditions for Referral Approval Rules. When the vendor creates AME conditions, he/she must enter attribute names in upper case as specified.

Table 10–2 AME Attributes

Name	Description
CUSTOMER	Customer Name
CUSTOMER_COUNTRY	Customer Country
PARTNER_INDUSTRY	Partner Industry
PARTNER_LEVEL	Partner Level
PARTNER_NAME	Partner Name
PARTNER_TYPE	Partner Type
PRODUCT_CATEGORY_ID	Product category Id matches exact or parent categories

10.2.11 Setting Up Rules Using DQM Tools

Use this procedure to set up rules.

Prerequisites

None

Steps

1. Log into Oracle Forms as a Trading Community Manager and navigate to Data Quality Management > Setup > Match Rules.
2. In the Match Rules screen, enter data in the 'Acquisitions' sub tab and enter details for:

Attribute 1, Description, Status, Purpose, Attribute Name, Entity, Attribute Match, Transformation Name, Attributes 2 and 3, Entity, Type, and Transformation Name.
3. Save your changes. The Acquisitions details for the rule is saved.
4. Select the Click 'Scoring' sub tab and enter details for:

Attribute 1, Attribute Name, Entity, Score, Transformation Name, Weight, select the 'Exact' option, and enter similar details for Attribute 2.

- 5. Save your changes. The scoring details for rule is saved.
- 6. Click **Compile**. The rule is complied.

For customer duplicates, if the search criteria is based on the 'party name', you must select a rule that has 'party name' as a condition in that rule.

For contact duplicates, if the search criteria is based on the 'contact name', you must select a rule that has 'contact name' as a condition in that rule.

10.3 Profile Options

Table 10–3 lists the profile options that need to be set up for Referral Management.

Table 10–3 Profile Options

Profile Name	Level - Site/Application/Responsibility/User	Default At	Default Value	Description
OS: Opportunity Access Privilege	SRU	Site	Full	<p>This profile drives the behavior of opportunity access. This profile is defined within the Sales Application but Oracle Partner Management uses it to drive access to referalls.</p> <p>If this profile is set to 'Full', users can view all the referrals that have been approved and converted to an opportunity.</p> <p>If this profile is set to another value, users can only view referrals linked to opportunities where they are on the sales team.</p>

Table 10–3 Profile Options

Profile Name	Level - Site/Application/Responsibility/User	Default At	Default Value	Description
OS: Sales Lead Access Privilege	SRU	Site	Full	<p>If this profile is set to 'Full', users can view all referrals that generated a lead.</p> <p>If this profile is set to another value, users can only view referrals linked to leads where they are on the sales team.</p>
PV: Default Referral Approver (if AME approval rules are not setup)	SAR	-	-	The default approver if the AME approval rule does not return any approvers for the referral.
PV: Assign Approvers to lead or opportunity	SAR	Site	No	<p>If this profile is set to 'Yes', when the referral generates a lead or opportunity, the approvers of the referral is added to the sales team of the lead or opportunity.</p> <p>Additionally, for a lead, the owner of the lead is set to the first approver of the referral. However, if 'PV: Assign Channel Manager to sales transactions' is also set to 'Yes', the owner of the lead is set to one of the channel managers of the referral.</p>
PV: Assign Channel Manager to sales transactions	SAR	-	-	<p>If this profile is set to 'Yes', when the referral generates a lead or an opportunity, the channel managers of the partner submitting the referral is added to the sales team of the lead or the opportunity.</p> <p>Additionally, for a lead, the owner of the lead is set to one of those channel managers.</p>

Table 10–3 Profile Options

Profile Name	Level - Site/Application/Responsibility/User	Default At	Default Value	Description
PV: Copy Lead Owner or Sales team members on approval notifications	SAR	-	-	<p>If this profile is set to 'Yes', notifications are sent to lead owners if a lead is generated from a referral, or to sales team members if an opportunity is generated from a referral.</p> <p>Note: The referral benefit must be configured to send notification to those user types.</p>
MO: Operating Unit	SAR	-	-	<p>Determines the vendor organization operating unit that the partner is interacting with, when making a referral. This is normally set at the partner responsibility that the partner is using to log into the system.</p> <p>This is used to create the claim against the correct operating unit.</p>
PV: DQM Contact Match Rules	SAR	-	-	Stores the DQM rule used to perform customer contact DQM for a referral.
PV: DQM Customer Match Rules	SAR	-	-	This profile stores the DQM rule used to perform customer DQM for a referral.
OZF: Validate market and product eligibility between object and budget	SR	-	-	This is for enabling budget validation when a referral offer is created. This should be set at the responsibility level for the 'Channel Administrator' responsibility and it should be set to 'Validate customer and products by each budget'.

Table 10–3 Profile Options

Profile Name	Level - Site/Application/Responsibility/User	Default At	Default Value	Description
QP: Source System Code	SAU	-	-	This should be set at the application level for Oracle Partner Management. It should be set to the same value that the 'Oracle Marketing' application is set to.
AMS : Allow Recalculation of Committed Budget	SARU	-	-	If this profile is set to 'Yes', when the budget exceeds the limit while making the accrual, the accrual is allowed to exceed the budget's committed amount, enabling the offer to ask for more fund later.
OZF: Allow committed budget to exceed total amount	-	-	-	If set to 'Yes', the referral benefit can be activated even though the requested budget amount exceeds the total budget amount. If set to 'No', the referral benefit will fail validation if the requested budget amount exceeds the total budget amount.
PV: Contact Relationship Codes	SAR	Site	Contact Of	When a new customer contact is created, this profile is used to determine the relationship of the contact with the customer.
PV: iStore Login URL	S	-	-	Partner login URL link sent with workflow notification for the partner users.
PV: Self Service URL with Workflow Notification	S	-	-	Vendor Self Service Apps URL sent with a workflow notification for vendor users.
PV: Default DQM Approver	SAR	None	-	The default approver if the AME approval rule does not return any DQM approvers.

Table 10–3 Profile Options

Profile Name	Level - Site/Application/Responsibility/User	Default At	Default Value	Description
HZ: Generate Party Number	SARU	-	-	Generate party number when creating a party. As part of the customer de-duplication process for referrals, a new customer can be created in the system. This profile needs to be set to 'Yes' for the customer to be created successfully in the system.
HZ: Generate Party Site Number	SARU	-	-	Generate party site number when creating a party site. As part of the customer de-duplication process for referrals, a new customer can be created in the system. This profile needs to be set to 'Yes' for the customer site to be created successfully in the system.

10.4 Concurrent Programs

Table 10–4 lists concurrent programs that need to be run for Referral Management.

Table 10–4 Concurrent Programs

Concurrent Program	Required	Description
OZF-TM: Net Accrual Engine	Yes	This concurrent program is used to calculate accruals. The accrual created is used to calculate the referral commission. Run this program before you run the 'PV - Referral Compensation Order Completion' program and when you want to calculate how much your partners have accrued. This can be run once a month at the end of the month.

Table 10–4 Concurrent Programs

Concurrent Program	Required	Description
PV - Update Referral/Deal Status	Yes	<p>This concurrent program goes through all approved referrals to update the status to one of the following:</p> <ul style="list-style-type: none"> 'Closed. Dead Lead' 'Closed. Lost Opportunity' 'Closed. Opportunity Won' 'Expired' <p>Run this program when you want to close approved referrals. You must run this program before running the 'PV - Referral Compensation Order Completion' program. Run this program on a weekly schedule to make sure the referral statuses are up to date.</p>
PV - Referral Compensation Order Completion	Yes	Run this program to create claims and start the payment process for referrals that generated fulfilled orders. This should be run once a month.
Generate Territory Package. Required	Yes	As a part of the standard territory creation process, this program must be run after a territory is created.
OZF-TM: Generate Party List for Market Qualifier. Required	Yes	<p>This concurrent program populates a denormalized table AMS_PARTY_MARKET_SEGMENTS which stores customer segmentation information based on territory definitions. This concurrent program needs to be run in two situations:</p> <ol style="list-style-type: none"> 1. When a new territory is created. It should be run after 'Generate Territory Package' is run. 2. When a new customer is created. <p>It ensures that the net accrual engine matches customer orders to offers accurately.</p>

Table 10–4 Concurrent Programs

Concurrent Program	Required	Description
DQM Staging Program	Yes	<p>Login as a user with the 'Trading Community Manager Responsibility' and run this program when a new party (hz_parties) is created in the system. This populates the search table against which the DQM process performs the query.</p> <p>Parameters:</p> <p>Number of Workers = 5</p> <p>Staging Command = STAGE_ALL_DATA</p> <p>Continue previous execution = 'No'</p> <p>No values need to be set for the rest</p>

10.5 Lookups

Table 10–5 lists lookups that need to be set up for Referral Management. Vendors can add more values to the existing list.

Table 10–5 Lookups

Lookup Type	Description	Value
Referral Decline Reason (PV_REFERRAL_DECLINE_REASON)	Customer Details Not Verified	CUST_DTLS_NOT_VERIFIED
	Existing Lead	EXISTING_LEAD
	Existing Opportunity	EXISTING_OPPTY
	More Information Required	MORE_INFO_REQD

10.6 Interaction with Other Modules

The Referral Management module integrates with multiple products within the Oracle E-Business Suite such as Oracle Approvals Manager, Oracle Customer Data Quality Manager (DQM), Territories, Oracle Trade Management (Offer, Budget, Claim), Oracle Sales Online, Oracle Leads Management, Oracle Workflow and Partner Programs to deliver this functionality.

- Oracle Trade Management - Vendors compensate partners through Oracle Trade Management functionality in the areas of offer, budget and claim.

- Budget - Vendors source the referral benefit from one or more fixed and active budgets to pay out the partner's compensation.
- Offer - A Net Accrual Offer is created for each referral benefit using the budget specified in the benefit. All referrals created using this referral benefit accrue against this offer. The offer is created in the background when the benefit is activated.
- Claims - A claim is generated by the system when a referred customer order is shipped and accruals are made for the order. This is the means by which referral management system compensates a partner for referral submitted.
- Oracle Approvals Manager - This is used to identify approvers for referrals submitted and also to identify the person responsible for checking customer duplicates and de-duplication on a referred customer.
- Oracle Customer Data Quality Manager - Referral Management leverages TCA-DQM functionality to find potential customer or contact matches in the system for the referred customer and contact. This reduces the occurrences of creating duplicate parties in the system.
- Territories - Territories are used to define geographic boundaries for which the referral benefit is applicable. These territories are defined under Oracle Trade Management usage with transaction type 'Offers'. For this release only the 'Country' qualifier is supported.
- Oracle Sales Online and Oracle Leads Management - Referrals, when approved, create leads or opportunities depending on the referral benefit. Referral is fully integrated with Oracle Sales Online and Oracle Leads Management and enables the cross navigation between a referral and a lead or opportunity.
- Partner Programs - Referral Management is implemented as a benefit that can be attached to any partner program. Partners, by enrolling into a program which has referrals as a benefit, gain access to the Referral Management functionality.
- Oracle Workflow - Integration with Oracle Workflow enables vendors to configure e-mail notifications for each referral status change.

10.7 Dependencies

Referral Management is dependent on the following features:

- [Offers](#)
- [Claims](#)

- [Opportunities/Leads](#)
- [DQM](#)

10.7.1 Offers

A referral benefit is created with product, territories, compensation rates, and budget. The referral benefit is activated and a budget request is submitted for approval.

When the referral benefit is activated (by clicking **Activate**), a Net Accrual Offer is created in the background and budget validation is performed on the offer. Budget validation involves ensuring that the products and territories information specified in the benefit setup screen correspond and fall under their counterparts specified in the budget. Budget validation also ensures that each of the budget requests has a valid amount. If any one of the above items failed the validation, the benefit status becomes 'Failed Validation'. Otherwise, it becomes 'Active'.

Active referral benefits are available to be added to a program and the program is published to partners for enrollment. The partner enrolls into the program and submits a referral. When the referral is approved, an opportunity is created. If the opportunity is won, an order is placed. The order is shipped.

At this point, the concurrent program 'OZF-TM: Net Accrual Engine' runs and calculates accrual for the partner. To calculate the accrual, orders with open referrals are matched on the same customer, products and validity date. If a match is found, the offer is applied and accrual is calculated. (compensation)

A claim is created and routed based on territory management. The claim analyst researches the claims and settles it. The internal approver reviews the claim and approves it. Once it is approved, it is sent to the partner for approval. The partner can accept or reject the compensation. If the partner requests for assistance, the claim is rejected. The claim is sent back to the analyst for additional processing. When the partner accepts the compensation, the claim is approved and sent to Oracle Accounts Payable or Oracle Receivable for payment. The partner is paid and the referral is closed.

Offers are applied to orders for which:

- Customers are in the geography that is valid for the offer.
- Products in the order maps to the one in the offer.
- Dates are within the validity period.
- An approved, valid referral on the same customer, products, and date is found.

10.7.2 Claims

Claims are processed through Oracle Accounts Payable or Oracle Accounts Receivables.

When a matching customer order is completed, meaning all the products ordered that matches the referral, are shipped, the claim process begins. A claim is automatically created, per qualifying referral, and routed to a claim analyst who views the claim and adjusts the claim amount if necessary. The compensation is posted to the partner for acceptance and after they approve the claim, processing of the claim is handled through Oracle Accounts Payable for check payment or Oracle Accounts Receivables for credit memo.

10.7.3 Opportunities/Leads

After the referral is approved and the customer and contact duplicate checking has been performed, a lead or opportunity is generated by the system. The lead or opportunity generated have a link to the referral to enable sales representatives to view details of the referral.

10.7.4 DQM

DQM is a tool from the Oracle Trading Community Architecture (TCA) group that is used to check for potential duplicate customers and contacts for a given customer and contact.

When a referral is created, the customer/reseller name entered by the partner needs to be matched to an existing record in TCA, if any.

- If there are no matches for the customer, a customer and contact are created.
- If there are matches for the customer, the DQM approver can review and decide to create a new organization or use an existing organization.
 - If the DQM approver creates a new organization, they also create a new contact.
 - If the DQM approver uses an existing organization, they check whether there are matches for the contact.

10.8 Users and Security

Access to referrals are controlled based on user types and permissions.

User Types

- Vendor User - These are employees in the vendor organization who can view referrals they have created and referrals they have access to, because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners.
- Vendor Manager - These are employees in the vendor organization who can view and update all referrals within their hierarchy.
- Vendor Administrator - These are employees in the vendor organization who can perform system setup activities. These users can also perform operations such as resetting the referral status if there is a mistake.
- Vendor Approver - These are employees in the vendor organization who can approve referrals. After they have performed the approval, they can continue to access the referral.
- DQM Approver - These are employees in the vendor organization who can run DQM to link customer and contact on the referral into the master customer in the system.
- Partner User - These are employees in the partner organization who can view and update referrals they have created and referrals where they are identified as the contact.
- Partner Administrator - These are employees in the partner organization who can view and update all referrals owned by their organization.

For information on setting up vendor users, see [Section 6.2.1, "Creating a Channel Manager"](#).

For information on setting up partner users, see [Section 3.3.2, "Creating a Partner"](#).

Permissions

- Super User Permission - [PV_REFERRAL_SUPERUSER] - Allows a vendor user to view and update all referrals and allows a partner user to view and update all referrals owned by their organization.
- Compensation Approver - [PV_REF_COMP_APPROVER] - This permission enables partners to view and accept compensation for referrals.

Users who are granted access to all leads and opportunities within the sales application can access all referrals that generated a lead or an opportunity.

Setting Up Deal Registration

This chapter provides information on setups required for Deal Registration. Topics included are:

- [Section 11.1, "Overview"](#)
- [Section 11.2, "Setups"](#)
- [Section 11.3, "Profile Options"](#)
- [Section 11.4, "Concurrent Programs"](#)
- [Section 11.5, "Lookups"](#)
- [Section 11.6, "Interaction with Other Modules"](#)
- [Section 11.7, "Dependencies"](#)
- [Section 11.8, "Users and Security"](#)

11.1 Overview

When partners resell your products, there is often a conflict between your direct sales force and your partner network. Deal Registration enables partners to submit opportunities and receive your commitment not to compete directly and support partners on the deal. You increase partner loyalty and gain visibility into partner activity.

When partners register a deal, it is routed to the appropriate approver(s). Approvers are notified of the deal registration and they review it and approve, reassign, or decline it. When the deal registration is approved, a new opportunity is created in the system and assigned to the partners' organization for fulfillment.

Vendors and partners receive notifications about deal registration activity and can navigate directly from the notification into the associated deal registration. Notifications are configured by the vendor and sent when the status changes, for example, when a deal registration is approved.

Vendors and partners can access a summary list of deal registrations that they have access to, in the system. They can build personal views to quickly find deal registrations that they are most interested in.

11.2 Setups

The following sections provide information on setups that are required for Deal Registration.

- [Section 11.2.1, "Setting Up Deals as Benefits"](#)
- [Section 11.2.2, "Defining Profile Attributes for the Deal"](#)
- [Section 11.2.3, "Defining Territories"](#)
- [Section 11.2.4, "Defining Notification Messages for the Deal"](#)
- [Section 11.2.5, "Setting Up Notes for a Deal"](#)
- [Section 11.2.6, "Setting Up Approvers in Oracle Approvals Management"](#)
- [Section 11.2.7, "Setting Up Rules Using DQM Tools"](#)

11.2.1 Setting Up Deals as Benefits

Use this procedure to set up a deal as a benefit.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Benefits > Benefit Administration page.
2. Select 'Deal Registration' benefit from the create LOV and click **Go**.
3. Enter a benefit name and select a benefit currency from the drop-down list.
4. Enter details in the Additional Details region.

These questions are questions that you want to ask when a partner wants to register a deal. For each question that you add, specify the following:

- Label - This is the label displayed in the deal details under the additional details section when the partner is registering a deal.
- Profile Attribute - This is the profile attribute which stores the value entered by the partner and determines how the field is displayed (for example, checkbox, single select, multi-select, currency, date, etc.).
- Order - The order in which you want to present the questions.
- Mandatory - Whether or not this is a mandatory field that the partner must enter.

For information on how to create your own questions, see [Section 11.2.2, "Defining Profile Attributes for the Deal"](#).

5. Enter product details in the Products region.

The deals created under this benefit setup are restricted to the product categories specified here.

6. Enter geographic territories in the Territories region.

A country or groups of countries (regions) are geographic territories which are defined in the Territory Manager module of Oracle Trade Management. The geographic territories restrict the customers that can be referred to specific countries as specified in the benefit.

When a deal is set up as a benefit, geographic regions and their threshold amounts should also be defined. The deal applies to the specified region(s) and a minimum threshold amount for each region must be defined. The registered

products' total amount should be greater than or equal to the threshold amount specified in the benefit for the matching geographic region.

For information on how to create territories, see [Section 11.2.3, "Defining Territories"](#).

7. Define notifications in the Notifications region.

Notifications are sent regarding the activities on a deal. They can be linked for any status of a deal. The following notifications are seeded:

- Deal Registration Accepted - Partner Notification
- Deal Approved - Requires Customer de-duplication - Vendor Notification
- Deal Registration Declined - Partner Notification
- Deal Registration Created - Partner Notification
- Deal Registration Created - Vendor Notification

For information on how to create your own notification messages, see [Section 11.2.4, "Defining Notification Messages for the Deal"](#)

For each deal status that you want to attach a notification, specify the following:

- Status - Deal status change that requires notification.
- User Role - Group of users that need to be notified for the corresponding status change.
- Notification Name - The workflow notification to use when sending notifications.

8. Click **Apply** to save the benefit. Click **Activate** to start the validation process.

The benefit creation process may go through one of the four benefit statuses: active, inactive, draft, or failed validation. When the process completes, the status is updated to Active or to Failed Validation.

Once a benefit becomes active, the following conditions hold:

- Products and territories can neither be removed nor added
- New Additional detail lines cannot be added
- New notification lines can be added

11.2.2 Defining Profile Attributes for the Deal

Once vendors define attributes for the deal, they can associate a question with the attribute. They can setup questions for the deal to track extra fields on the deal and automatically populate the fields on an opportunity. In addition, the partner responses to some of these questions transfer over to the opportunity created.

Table 11–1 lists attributes that are seeded and can be added to a deal benefit.

Table 11–1 Questions

Question	Map to Opportunity
Industry	-
Source (Campaign)	X
Number of users	-
Opportunity Description	-
Opportunity Size	-
SIC	-
Total employees	-
Information Verified	-
Customer Annual Revenue	-
Time Frame (Purchase Timeframe)	-
Budget Status	-
Total Budget	X
Response Channel	X
Sales Stage	X
Close Date	X
Offer	X

Additionally, the vendor can create their own set of questions. Use this procedure to define profile attributes for the deal.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Partner > Profile Attributes page.
2. Click **Create**.
3. In the Create Attribute page, enter the following required information:
 1. Attribute Type - Select either 'List of Values' or 'Text Box'. Do not select 'Derived'.
 2. Display Style - This depends on the attribute type that was selected. Based on the display style selected, the UI may present additional details that need to be updated.
 3. Enter a name, description and set the category to 'General'. This is not used but needs to be set.
 4. Set the status 'Active'.
 5. Select the 'Deal Registration checkbox under 'Related to' and set everything else at the default.
 6. Click **Create**.

11.2.3 Defining Territories

Territories are defined in the Territory Manager module in Oracle Trade Management with the transaction type 'Offers'.

Use this procedure to define territories.

Prerequisites

None.

Steps

1. Log in to Oracle Forms as a CRM Administrator and navigate to Territory Manager > Territory Administration.

The navigator is seen with all available territories.
2. Select Oracle Trade Management territory and navigate to Admin > Define Territory.
3. Enter 'Oracle Trade Management' in the Usage field.
4. Enter a name for the territory in the Name field.

5. Select 'Offer' as the Transaction Type.

6. Save your details.

The territory is saved.

7. In the Transaction Qualifiers tab, enter values in the Name, Operator, and Value From fields.

The Qualifiers page appears. Oracle Partner Management supports only the 'Country' qualifier.

8. Save your details.

The territory is saved with all the qualifiers and resources.

11.2.4 Defining Notification Messages for the Deal

E-mail notifications are handled by Oracle Workflow. Some of the notification messages are defined using the Oracle Workflow builder tool and some of the notification messages are seeded.

Use this procedure to define notification messages.

Prerequisites

None

Steps

1. Launch the Workflow Builder 2.6 client application. Ensure that the access level is set to 100. Verify this in Help > About Oracle Workflow Builder 2.6. This ensures that the customization is preserved.
2. Navigate to File > Open > Database radio button. Enter the Apps login and database connection and click **OK**.
3. In the Show Item Type popup window, select Deal Registration Benefit Workflow and click **OK**.
4. Expand the Messages Node and see notification messages that have been seeded for Deal registration.
5. At this point, you can copy an existing message to use as your new message. You can reference any attribute that has been seeded out of the box in the message template.

Important: The Internal Name you give your message has to conform to the naming convention of DEAL STATUS CODE#### where #### is a 4 digit number starting with 1000. For example, DECLINED1001.

- 6. Save your changes and exit. You should see your newly defined workflow message appear in the notification section of the deal benefit.

Table 11–2 lists deal statuses and the corresponding deal code.

Table 11–2 Deal Statuses

Deal Status	Deal Code
Closed. Dead Lead	CLOSED_DEAD_LEAD
Closed. Lost Opportunity	CLOSED_LOST_OPPTY
Expired	EXPIRED
Draft	DRAFT
Closed by Vendor	MANUAL_CLOSE
Pending Approval	SUBMITTED_FOR_APPROVAL
Extended by Vendor	MANUAL_EXTEND
Pending Customer Review	APPRVD_PENDNG_CSTMTR_DQM
Declined	DECLINED
Approved	APPROVED

11.2.5 Setting Up Notes for a Deal

To set up notes, you must set up:

- Set Up Note Types
- Set Up Note Mapping

Oracle Partner Management has seeded a new source to associate note types to deals.

For more information, see the *Oracle Application Foundation Implementation Guide*.

Partners can only create public notes. Vendor users can decide to create private, public or publish notes.

When approvers approve, decline or reassign the deal registration, they can add their reasons for doing so, provide comments and subsequent approvers can see these comments in the Notes fields. Vendors can set up the security on the

comments to enable partners to see the comments or keep it private where only vendors can view comments.

The settings are:

1. Public: Other vendor users can see comments.
2. Publish: Partner users and other vendor users can see comments.
3. Private: Only vendor users can see comments.

11.2.6 Setting Up Approvers in Oracle Approvals Management

The first step of the approval process is to validate the information entered by the partner. Approvers are internal employees or vendors that are defined in Oracle Approval Management (AME). Approvers are assigned to review deals and,

- check for duplicate deals and approve or decline a deal. They are set up in AME and notified based on rules defined in AME.
- check for duplicate customers or contacts for their assigned deal. They are set up in DQM and notified to review the deal.

When the approver receives a notification, he/she reviews the deal, searches for duplicate deals and approves or declines the deal. Before approving the deal, the approver checks if the deal matches any existing deal.

Use this procedure to set up approvers.

Prerequisites

None.

Steps

1. Log in to the self-service application as an Approvals Management Application Administrator and navigate to Approvals Management Application Administrator > Approvals.

The Approvals Management page appears.

Click the Conditions tab.

Conditions tab

1. Select the 'PV: Deal Registration Management' transaction type and click **Continue**. The Conditions page appears.

2. Click **Add a Condition** and select the 'Ordinary' option and click **Continue**.
3. Select the 'Customer Country' attribute and click **Continue**.
4. Click **Create Condition**.
Click the Groups tab.

Groups tab

1. In the Create an approval group page, enter a name, description and static option.
2. Click **Create Group**. A group is created.
3. Click **Add Approver** and search for an approver.
4. Click **Search**. The approvers matching search criteria appears.
5. Select an approver and click **Continue**.
6. Click **Create Member**. An approver is added and edit approval group page appears.
7. Click **Quit**. An approval group is created with an approver.
Click the Rules tab.

Rules tab

1. Select 'PV: Deal Registration Management' transaction type and click **Continue**. The Rules page appears.
2. Click **Add Rule and Usage** and enter a description , Rule Type - list-creation, Start Date - current date, End Date - none.
The Add a Rule-Step 1 page appears.
Click **Continue**. The Add a Rule-Step 2 page appears.
3. Select the 'chain of authority includes an approval group' option and click **Continue**. The Add a Rule-Step 3 page appears.
4. Select the approval group created above from the LOV and click **Continue**. The Add a Rule-Step 4 page appears.
5. Select 'Customer Country' in the 'Ordinary-Condition Attributes' multi-select field, and click **Continue**. Add a Rule-Step 5 page appears.
6. Select 'Customer Country is true' in the 'Ordinary Conditions' field, and click **Continue**.

A rule is created and the approval setup is complete. When a deal registration is sent to the approvals engine from the deal registration module, it processes the rule defined for the deal registration in the system and return the approver according to the approver type chosen.

Table 11–3 lists the AME attributes that are available to define conditions for Deal Approval Rules. When you create AME conditions, enter values in upper case as specified.

Table 11–3 AME Attributes

Name	Description
CUSTOMER	Customer Name
CUSTOMER_COUNTRY	Customer Country
PARTNER_INDUSTRY	Partner Industry
PARTNER_LEVEL	Partner Level
PARTNER_NAME	Partner Name
PARTNER_TYPE	Partner Type
PRODUCT_CATEGORY_ID	Product category identifier matches exact or parent categories

11.2.7 Setting Up Rules Using DQM Tools

DQM is a tool from trading community architecture (TCA) group that is used to check for potential duplicate customer, contact, address and/or contact point for a given customer, contact, address or contact point attributes.

Use this procedure to setup rules in DQM.

Prerequisites

None.

Steps

1. Log into Oracle Forms as a Trading Community Manager and navigate to Data Quality Management > Setup > Match Rules.
2. In the Match Rules screen, enter data in the 'Acquisitions' sub tab and enter details for:

Attribute 1: Rule Name, Description, Status, Purpose, Attribute Name, Entity, Attribute Match, and Transformation Name.

Attributes 2 and 3: Attribute Name, Entity, Type, and Transformation Name.

- 3. Save your changes. The Acquisitions details for the rule is saved.
- 4. Select the Click 'Scoring' sub tab and enter data for:

Attribute 1: Match Threshold, Attribute Name, Entity, Score, Transformation Name, Weight, and select the 'Exact' option.

Attribute 2: Attribute Name, Entity, Type, Score, Transformation Name, Weight and select the 'Exact' option.
- 5. Save your changes. The scoring details for rule is saved.
- 6. Click **Compile**. The rule is complied.

11.3 Profile Options

Table 11–4 lists the profile options that need to be set up for Deal Registration.

Table 11–4 Profile Options

Profile	Level - Site/ Responsibility /User	Default At	Default Value	Description
OS: Opportunity Access Privilege	SRU	Site	Full	<p>This profile drives the behavior of opportunity access. This profile is defined within the Sales Application but Oracle Partner Management uses it to drive access to deals.</p> <p>If this profile is set to 'Full', users can view all deal registrations that generated an opportunity.</p> <p>If this profile is set to another value, users can only view deal registrations linked to opportunities for which they are on the sales team.</p>

Table 11–4 Profile Options

Profile	Level - Site/ Responsibility /User	Default At	Default Value	Description
PV: Default Deal Registration Approver	SAR	-	-	The default approver if the AME approval rule does not return any approvers for the deal.
PV: Default DQM Approver	-	-	-	The default approver if the AME approval system does not return any DQM approvers.
PV: Assign Approvers to lead or opportunity	SAR	Default	-	When creating an opportunity, if this profile is set to Yes, the approvers of the deal registration are added to the sales team of the opportunity.
PV: Assign Channel Manager to sales transactions	SAR	-	-	When creating an opportunity, if this profile is set to yes, the channel manager is added to the sales team of the opportunity with full access and the keep flag enabled.
PV: DQM Contact Match Rules	SAR	-	-	This profile stores the DQM rule that is used to perform contact DQM for the customer.
PV: DQM Customer Match Rules	SAR	-	-	Stores the DQM rule that is used to perform customer DQM for the customer.
PV: Contact Relationship Codes	SAR	Site	Contact Of	Used to determine the relationship of the contact with the customer.
PV: iStore Login URL	S	-	-	Partner Login URL link sent with workflow notification for partner users.
PV: Self Service URL with Workflow Notification	S	-	-	Vendor Self Service Apps URL sent with a workflow notification for vendor users.

Table 11–4 Profile Options

Profile	Level - Site/ Responsibility /User	Default At	Default Value	Description
HZ: Generate Party Number	SARU	-	-	Generate party number when creating a party. As part of the customer de-duplication process for deals, a new customer can be created in the system. This profile needs to be set to 'Yes' for the customer to be created successfully in the system.
HZ: Generate Party Site Number	SARU	-	-	Generate party site number when creating a party site. As part of the customer de-duplication process for deals, a new customer can be created in the system. This profile needs to be set to 'Yes' for the customer site to be created successfully in the system.

11.4 Concurrent Programs

Table 11–5 lists concurrent programs that need to be run for Deal Registration.

Table 11–5 Concurrent Programs

Concurrent Program	Required	Description
PV - Update Referral/Deal Status	Yes	This concurrent program goes through all approved deal registrations to update the status to one of the following: 'Closed. Dead Lead' 'Closed. Lost Opportunity' 'Closed. Opportunity Won' 'Expired'

11.5 Lookups

Table 11–6 lists lookups that need to be set up for Deal Registration. Vendors can add more values to the existing list.

Table 11–6 Lookups

Lookup Type	Lookup Code	Description
Referral Decline Reason (PV_REFERRAL_DECLINE_REASON)	CUST_DTLS_NOT_VERIFIED	Customer Details Not Verified
	EXISTING_LEAD	Existing Lead
	EXISTING_OPPTY	Existing Opportunity
	MORE_INFO_REQD	More Information Required

11.6 Interaction with Other Modules

The Deal Registration module integrates with multiple products within the Oracle E-Business Suite such as Oracle Approvals Manager, Oracle Customer Data Quality Manager (DQM), Territories, Oracle Sales Online, Oracle Workflow and Partner Programs to deliver this functionality.

- Oracle Approvals Manager - This is used to identify approvers for deals submitted and also to identify the person responsible for checking customer duplicates and de-duplication on a registered customer.
- Oracle Customer Data Quality Manager - Deal Registration leverages the TCA-DQM functionality to find potential customer or contact matches in the system for the registered customer and contact. This reduces duplicate parties in the system.
- Territories - Territories are used to define geographic boundaries for which the deal benefit is applicable. These territories are defined under Oracle Trade Management usage with transaction type 'Offers'. For this release only the 'Country' qualifier is supported.
- Oracle Sales Online - Deals, when approved, create opportunities. Deal registration is fully integrated with Oracle Sales Online and allows the cross navigation between a deal and an opportunity.
- Partner Programs - Deal Registration Management is implemented as a benefit that can be attached to any partner program. Partners, by enrolling into a program that has deals as a benefit, gain access to the Deal Registration functionality.

- Oracle Workflow - Integration with Oracle Workflow enables to configure e-mail notifications for each deal status change.

11.7 Dependencies

Deal Registration is dependent on the following features:

- [Opportunities](#)
- [Product Categories](#)
- [DQM](#)

11.7.1 Opportunities

Deal Registration enables partners to register deals with the vendor to avoid competition on the sale. Vendors gain visibility into partner activity and avoid channel conflict. With the deal registration flow partners and vendors can work more closely and close more business.

When a deal registration is accepted, it gets converted to an opportunity. The lead or opportunity generated has a link to the deal to enable the sales representative to view details of the deal registration.

11.7.2 Product Categories

When a partner submits a deal registration, the products that can be registered are based on the benefit setup. Product categories need to be defined in the form of a hierarchy, that are relevant for the benefit. This information is used as the basis for approving a deal registration, identifying products for which the partner is seeking non-competition status and generating an opportunity in the system for partner to close.

For information on defining product categories, see *Oracle Advanced Product Catalog User Guide*.

11.7.3 DQM

DQM is a tool from trading community architecture (TCA) group that is used to check for potential duplicate customer, contact, address and/or contact point for a given customer, contact, address or contact point attributes.

When a deal is registered, the customer name, reseller entered by the partner needs to be matched to an existing record in TCA, if any.

- If there are no matches for the customer, reseller (via DQM), a new customer is automatically created by the system.
- If there are no matches for the person specified (via DQM), a new person with a 'contact' relationship with the specified customer is automatically created by the system.
- If there are possible customer matches, the DQM approver can review the matches and select an existing customer in the system or choose to create a new customer.
- If there are possible person matches, the DQM approver can review the matches and select an existing 'contact relationship' in the system or choose to create a new customer.

11.8 Users and Security

Access to deals are controlled based on user types and permissions.

User Types

- Vendor User - These are employees in the vendor organization who can view deals they have created and deals they have access to, because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners.
- Vendor Manager - These are employees in the vendor organization who can view and update all deals within their hierarchy.
- Vendor Administrator - These are employees in the vendor organization who can perform system setup activities. These users can also perform operations such as resetting the deal status, if there is a mistake.
- Vendor Approver - These are employees in the vendor organization who can approve deals. After they have performed the approval, they can continue to access the deal.
- DQM Approver - These are employees in the vendor organization who can run DQM to link customer and contact on the deal into the master customer in the system.
- Partner User - These are employees in the partner organization who can view and update deals they have created and deals where they are identified as the contact.

- Partner Administrator - These are employees in the partner organization who can view and update all deals owned by their organization.

For information on setting up vendor users, see [Section 6.2.1, "Creating a Channel Manager"](#).

For information on setting up partner users, see [Section 3.3.2, "Creating a Partner"](#).

Permissions

- Super User Permission - [PV_DEAL_SUPERUSER] - Vendors with this permission can view and update all deals. Partners with this permission can view and update all deals for their organization.
- Users who are granted access to all leads and opportunities within the sales application can access all deal registrations linked to an opportunity.

Setting Up Special Pricing Management

This chapter provides information on setups required for Special Pricing Management. Topics included are:

- [Section 12.1, "Overview"](#)
- [Section 12.2, "Setups"](#)
- [Section 12.3, "Profile Options"](#)
- [Section 12.4, "Concurrent Programs"](#)
- [Section 12.5, "Lookups"](#)
- [Section 12.6, "Interaction with Other Modules"](#)
- [Section 12.7, "Seeded Data"](#)
- [Section 12.8, "Users and Security"](#)

12.1 Overview

Special Pricing Management enables partners to submit and check the status of special pricing requests and claims online. A special pricing request enables partners to request discounted pricing from the vendor. Partners can request discounts on competitive sales deals, specific end-customer deals, and on inventory that they have not been able to move.

When a request is submitted, it gets routed to the appropriate approver(s). Approvers are notified of the request and they review the request and approve or decline it. After the special pricing request has been approved, and the partner has closed the sale, he/she can submit a claim to receive the discount that was approved. The claim is routed to the claim approver who then validates the claim. When the claim gets approved, the vendor pays the discount amount.

Partners receive notifications about the special pricing request activity and can link directly from the notification into the associated special pricing request. Notifications are configured by the vendor and sent when the status changes, for example, when a special pricing request is approved.

Partners can access a summary list of all the special pricing requests that they have access to, in the system. They can build personal views to quickly find the special pricing requests that they are most interested in.

12.2 Setups

The following sections provide information on setups that are required for Special Pricing:

- [Section 12.2.1, "Special Pricing Setup"](#)
- [Section 12.2.2, "Setting Up Notifications"](#)
- [Section 12.2.3, "Data Quality Management \(DQM\)"](#)
- [Section 12.2.4, "Setting Up Approvers in Oracle Approvals Management"](#)
- [Section 12.2.5, "Setting Up Claims"](#)

12.2.1 Special Pricing Setup

To make the Special Pricing link available in the 'Quick Links' bin, a custom responsibility must be created and this responsibility can include the special pricing function in the menu structure.

Menus tied with the 'Partner Super User' responsibility can be used as a reference to create menus for custom responsibilities. For defining menus that can be used with the Quick Links bin, see the *Oracle iStore Implementation Guide*.

Use this procedure to create a custom responsibility for accessing a special pricing request, with root menu and menu exclusions.

Prerequisites

None.

Steps

1. Log into Oracle Forms as the system administrator and navigate to Security > Responsibility > Define.

2. Enter the following details in the Responsibilities window.

Responsibility Name: Partner Special Pricing

Application: Partner Relationship Management

Responsibility Key: PV_SPECIALPRICE

Description: Responsibility for Special Pricing

Name: Standard

Application: Partner Relationship Management

Menu: Root menu name

3. Click **Save**.

A custom responsibility is created.

For more information, see [Chapter 5, "Setting Up the Partner Dashboard"](#).

12.2.2 Setting Up Notifications

Vendors can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of.

Use the following procedure to set up notifications.

Prerequisites

None

Steps

- 1. Log in as the channel administrator and navigate to Special Pricing Notifications > Special Pricing Notifications page.
- 2. Select a status, user role and notification name from the respective drop-down lists.
- 3. Click **Save**.

The notification has been defined.

Table 12–1 lists seeded notifications. Customers can add more notifications.

Table 12–1 Notifications

Notification Name	User Role	Status
Request Created - Channel Manager Notification	Channel Manager	Draft
Request Submitted - Partner Notification	Partner Contact, Special Pricing Super User (Partner)	Pending Approval
Request Submitted - Vendor Notification	Vendor Channel Manager, Vendor Approvers, Special Pricing Super User (Vendor)	Pending Approval
Request Approved - Partner Notification	Partner Contact, Special Pricing Super User (Partner)	Approved
Request Returned - Partner Notification	Partner Contact, Special Pricing Super User (Partner)	-
Request Cancelled - Partner Notification	Partner Contact, Special Pricing Super User (Partner)	-
Request Declined - Partner Notification	Partner Contact, Special Pricing Super User (Partner)	Declined

12.2.2.1 Defining Notification Messages for the Special Pricing Request

E-mail notifications are handled by Oracle Workflow. Some notification messages are defined using the Oracle Workflow builder tool and some notification messages are seeded.

Use this procedure to define notification messages.

Prerequisites

None.

Steps

1. Launch the Workflow Builder 2.6 client application. Ensure that the access level is set to 100. Verify this in Help > About Oracle Workflow Builder 2.6. This ensures that the customization is preserved.
2. Navigate to File > Open > Database radio button. Enter the apps login and database connection and click **OK**.
3. In the Show Item Type popup window, select Special Pricing Benefit Workflow and click **OK**.
4. Expand the Messages Node and see notification messages that have been seeded for Special Pricing.
5. At this point, you can copy an existing message to use as your new message. You can reference any attribute that has been seeded out of the box in the message template.

Important: The Internal Name you give your message has to conform to the naming convention of SPECIAL PRICING STATUS CODE#### where #### is a 4 digit number starting with 1000. For example, DECLINED1001.

6. Save your changes and exit. You should see your newly defined workflow message appear in the notification section of the deal benefit.

Table 12–2 lists special pricing statuses and the corresponding special pricing code.

Table 12–2 Special Pricing Request Statuses

Status	Code
Draft	DRAFT
Pending Approval	SUBMITTED_FOR_APPROVAL
Approved	APPROVED
Declined	DECLINED
Closed	CLOSED

12.2.3 Data Quality Management (DQM)

DQM is a tool from the Oracle Trading Community Architecture (TCA) group that is used to check for potential duplicate customers or contacts for a given customer or contact.

When a special pricing request is created, the end-customer name and reseller entered can be matched to an existing record in TCA.

If a duplicate record exists, the approver selects the existing end customer or partner record, and the system links the selected record with the special pricing request. If the system finds an exact match with one and only one party, then the system automatically links the selected record with the special pricing request. If a duplicate record does not exist, the approver creates a new end customer or partner record.

Users with the permission OZF_SPECIAL_PRICE_DQM and OZF_SPECIAL_PRICING_SUPERUSER can identify DQM approvers. Any user with this permission and with access to the special pricing function can look up requests that need party matching from the entire request list by filtering requests. In the Create View page, add the 'Customer Data Merged' column in the search query to filter data and view requests for which DQM is required to be run.

12.2.4 Setting Up Approvers in Oracle Approvals Management

When a request is created, it has to be approved by the approver. The approver views the request and approves or declines it. Approvers are internal employees or vendors that are defined in Oracle Approval Management (AME). Approvers are assigned to review requests and can perform the following:

- Validate the information entered by the partner.
- Check for similar requests and accept or decline a request.
- Compare pricing details between similar requests.
- Reassign requests to another vendor user to approve or decline requests. The newly assigned user must be able to access the special pricing request.

Vendors can configure the approval process. For example, they can have a single approver or multiple approvers. Once a request is approved, it is locked.

Use this procedure to set up approvers.

Prerequisites

None

Steps

1. Log in to the self-service application as an Approvals Management Application Administrator and navigate to Approvals Management Application Administrator > Approvals.

The Approvals Management page appears. Click the Conditions tab.

Conditions Tab

1. Select 'Special Pricing Request' transaction type and click **Continue**.
2. Click **Add a Condition**, select the 'Ordinary' option and click **Continue**.

The window to select the condition's attribute appears.

3. Select the attribute on which you want to set a condition.
For example, 'Customer Country' and click '**Continue**' and set a value like 'US'.
4. Click **Create Condition** to create the condition.
You can add any number of conditions.
5. Click the Groups tab.

Groups Tab

1. Click **Add Group** and provide a name and description and click **Create Group**.

The group is created and the Edit Approval Group window appears.

2. Click **Add Approver**. Search for an approver, select the approver and click **Create Member**.

If there is more than one approver, pick the order in which the approvals have to be performed. The approver is added and the Edit Approval Group window appears.

3. Click the Rules tab.

Rules Tab

1. Select 'Special Pricing Request' transaction type and click **Continue**.
2. Click **Add Rule and Usage**. Enter a description, select Rule Type as 'list-creation-rule', select the start date (current date) and end date appropriately. Click **Continue**. The 'Add a Rule-Step 2' window appears.
3. Select the 'chain of authority includes an approval group' option and click **Continue**. The Add a Rule-Step 3 window appears.

4. Select the approval group created above and click **Continue**. The 'Add a Rule-Step 4' window appears.
5. In the 'Ordinary-Condition Attributes' multi-select field, select attribute 'Customer Country' and click **Continue**. The 'Add a Rule-Step 5' window appears.
6. In the 'Ordinary Conditions' field, check the option for 'Customer Country is true' and click **Continue**.

Rule is created and the approval setup is complete.

Once requests are submitted from the special pricing request module, the approvals engine processes the rule defined for special pricing requests and returns approvers according to the approver type chosen.

For more information, see the *Oracle Approvals Management User Guide*.

12.2.5 Setting Up Claims

The following setups are required to set up claims.

Custom Setup

A custom setup can be seeded for special pricing claims. Creating different custom setups provide the following benefits:

- A different prefix can be used for special pricing claims and it applies to the claim number.
- Approvals can be routed differently based on this setup.
- The claim validation process can be different.

Custom setups are created from Oracle Trade Management User > Administration > Trade Management > Setups > Custom Setups.

Claim Reasons

Partners can give specific reasons when submitting claims on special pricing requests. Reasons that can be seen by a partner user have to be flagged for 'Partner Access'. Claim reasons are setup from Oracle Trade Management User > Administration > Trade Management > Claim > Reasons.

Claim Defaults

Claim defaults allows setting up of default custom setup, claim type and claim reason for Special Pricing claims. Claim defaults are setup from Oracle Trade Management User > Administration > Trade Management > Claim > Claim Defaults.

Trade Profiles

Trade Profiles allow defaulting of payment methods, vendor and vendor site mapping for a partner and batch level, line level threshold limits for error margins of special pricing claims submitted through the Indirect Sales Management module. Trade profiles are setup from Oracle Trade Management User > Administration > Trade Management > Customer > Trade Profile.

For more information, see *Oracle Trade Management Implementation Guide*.

12.3 Profile Options

Table 12–3 lists the profile options that need to be set up for Special Pricing Management.

Table 12–3 Profiles Options

Profile Name	Required Yes or Optional	Level - Site/ Application/ Responsibilit y/User	Setting - Available setting choices	Description
OZF_SP_ ENABLE_ PROD_ SECURITY	Optional	Site, Responsibility	Yes/No	Value in the profile controls if all products should be displayed or only products belonging to categories assigned to a partner in the Special Pricing Product Categories field in the partner's profile. The user selects at the product category level. The partner can see all products under that category and subcategories.

Table 12–3 Profiles Options

Profile Name	Required Yes or Optional	Level - Site/ Application/ Responsibilit y/User	Setting - Available setting choices	Description
OZF_SP_ GRACE_DAYS	Optional	Site, Responsibility	Numbers	Used to set up grace days to close special pricing requests. It is the number of days past the end date. The value is zero if the profile is not set.
OZF_SP_ DEFAULT_ APPROVER	Optional	Site, Responsibility	List of internal employees	Request is sent to this default approver when Oracle Approvals Manager does not find any rule that matches the special pricing request criteria.
OZF_SP_ DEFAULT_ BUDGET	Optional	Site, Responsibility	List of active fixed budgets	Budget from this profile is used to create the budget request when a special pricing request is submitted.
OZF_SP_ PARTY_DQM_ RULE	Optional	Site, Responsibility	List of DQM rules for party match	Used to find the master party record for the reseller and end customer names, when submitting a special pricing request.

12.4 Concurrent Programs

The 'OZF - TM: Release Committed Budget Amount After Grace Period' concurrent program closes a special pricing request after the grace period, makes the Submit Claim button no longer available, and reconciles the liabilities. It can be scheduled to run periodically.

12.5 Lookups

[Table 12–4](#) lists lookups that need to be set up for Special Pricing Management.

Table 12–4 Lookups

Lookup Name	Lookup Type Code	Type - System/ Extensible/ User	Value	Description
Request Status	OZF_REQUEST_STATUS	System	DRAFT APPROVED CLOSED DECLINED SUBMITTED_FOR_APPROVAL	Draft Approved Closed Declined Pending Approval
Request Class	OZF_REQUEST_CLASS	System	SOFT_FUND SPECIAL_PRICE	Soft Fund Special Price
Request Type	OZF_REQUEST_TYPE	System	MEET_COMPETITOR BLANKET_REQUEST BID_REQUEST	Meet Competitor Price Blanket Request Bid Request
Special Pricing Request Decline Code	OZF_SP_REQUEST_DECLINE_CODE	Extensible	CANNOT_MEET NEED_MORE_INFO	Cannot Meet Discount Requested Need More Information
Special Pricing Discount Type	OZF_SP_REQUEST_DISTYPE	System	% AMT NEWPRICE	Discount Percent Discount Amount New Price
Special Pricing Request Outcome	OZF_SP_REQUEST_OUTCOME	Extensible	IN_PROGRESS LOST WON	In Progress Lost Won

Table 12–4 Lookups

Lookup Name	Lookup Type Code	Type - System/ Extensible/ User	Value	Description
Marketing Fund Source	OZF_FUND_SOURCE	System	SPECIAL_PRICE	Special Price
			FUND	Budget
			CAMP	Campaign
			DELV	Deliverable
			EVEH	Event
			EVEO	Event Schedule
			OFFR	Offer
			EONE	One Off Event
			OPTN	Other Partner
			PTNR	Partner
			USER	Person
			PRIC	Price List
			CSCH	Schedule
			VEND	Vendor

12.6 Interaction with Other Modules

This section lists interactions or integrations with other Oracle Partner Management flows and other Oracle eBusiness Suite products or modules.

Oracle Trade Management - Offers

When a special pricing request is approved, an offer is generated. Offers are created in Oracle Trade Management and the types of offers are:

- ScanData Offer - This offer is generated in the Existing Inventory scenario. The offer enables vendors to reimburse partners for the discounted amount on products that partners have already bought.
- Off Invoice Offer - This offer is generated in the New Inventory scenario. This offer acts as a pricing modifier for future orders. Vendors can see the Offer Type field during approval if the Ship from Stock check box is not selected. If the vendor approver specifies this type of offer, partners do not have to submit

a claim. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to receive the discount. The authorization code is displayed on the approved special pricing request.

- **Accrual Offer** - This offer is generated in the New Inventory scenario. This offer acts as a pricing modifier for future orders. Vendors can see this field during approval if the Ship from Stock check box is not selected. If the vendor approver specifies type of offer, partners have to submit a claim to receive the approved discount. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to receive the discount. The authorization code is displayed on the approved special pricing request.

Oracle Trade Management - Budgets

A default budget can be set up for sourcing discounts. When a default budget exists, the system generates a budget request for the total discount amount requested, upon submission. The Budget tab can be configured to appear/not appear for approvers. When the budget tab appears, approvers can change the budget sourcing options. If approvers do not change the sourcing option, the system automatically adjusts the budget amount based on the approved amount. Approvers can only source from budgets that they have access.

Oracle Trade Management - Claims

After a sale is completed at the discounted price, the partner can submit a claim to collect payment. Claims can be submitted manually or automatically. To submit claims automatically, the partner can submit the POS or channel sales data with special pricing authorization information in it. Then, the system automatically generates claims from that data, links the claims to the appropriate special pricing request and validates and initiates payment on those claims per setups in Oracle Trade Management. Claims are validated in Oracle Trade Management.

Claims have to be submitted in the same vendor organization as the special pricing request is approved.

For more information, see the *Oracle Trade Management Implementation Guide*.

12.6.1 Liability Calculation

In case of special pricing requests, the liability gets created upon approval for each of the products for the total approved discount amount. When a request is linked with another request, the liability gets created only for amounts in products, which exceeds the current liability for that product.

For example:

A special pricing request (SPR1234) has been submitted to sell products mentioned in the table below, to a Customer A for the 'Existing Inventory' scenario.

Product	Discount Amount	Units	Discount
Laptop	\$120	10	1000
Desktop	\$100	60	6000

A special pricing request (SPR1235) has been submitted to sell products mentioned in the table below, to a Customer A for the 'Existing Inventory' scenario.

Product	Discount Amount	Units	Discount
Laptop	\$120	11	1100
Desktop	\$100	55	5500

If SPR1234 is approved first and SPR1235 gets linked to SPR1234 because it is a request for the same end-customer deal, when request SPR1235 gets approved, it creates an additional \$100 liability for laptops and an additional liability is not created for desktops.

In the above scenario, the same underlying offer authorization code would be used to track liabilities for both requests and both would have same agreement numbers.

12.6.2 Tracking Financial Liability

Each budget has five kinds of the budgeted amount. They are Planned, Committed, Utilized, Earned, and Paid. The planned amount increases when a request is made on that budget. When the budget request is approved, the committed amount increases. If a Scan Data offer is generated, the utilized and earned amounts increase when the offer is approved. If an Accrual or Off-Invoice offer is generated, the utilized amount increases when an order is booked and the earned amount increases after the order is shipped. For Scan Data and Accrual offers, the paid amount increases after claims are closed. For Off-Invoice offer, the paid amount increases after an invoice is generated for that order. In this flow, liabilities are earnings that are tracked based on the offer types.

In the 'Existing Inventory' scenario, accruals are created which can be paid upon completion of the sale.

In the 'New Inventory' scenario:

- When a request is approved with Accrual offers, utilizations get created after orders are placed and become available for payments once they are shipped.
- When a request is approved with Off-invoice offers, liabilities are not tracked as the discount is taken directly off the invoice.

For more information on liabilities, see the *Oracle Trade Management User Guide*.

12.7 Seeded Data

The following data is seeded for this functionality:

Permissions

- **OZF_SPECIAL_PRICING_SUPERUSER:** Vendor users with this permission can view, update, approve and have DQM access to all requests. Partner users with this permission can view and update all requests made by their organization.
- **OZF_SPECIAL_PRICING_DQM:** Vendor users with this permission can match a party record to a master TCA record or create a new party record. Anyone with this permission can see the DQM flag in the Personalize screen and select records where DQM has not been run and then select an existing or create a new record.

Notifications

E-mail notifications are handled by Oracle Workflow. Some notification messages are defined using the Oracle Workflow builder tool and some notification messages are seeded. Notification messages are contained in the workflow item type OZFSPBEN - 'Special Price Benefit Notifications'. Seeded messages in this workflow are:

- Request Created - Vendor Notification
- Request Submitted - Partner Notification
- Request Submitted - Vendor Notification
- Request Approved - Partner Notification
- Request Cancelled - Partner Notification

- Request Declined - Partner Notification

OAM Transaction Types and Attributes

The transaction type for special pricing is seeded and the value is 'OZF: Special Pricing Request'.

The following mandatory attributes are seeded.

- ALLOW_DELETING_RULE_GENERATED_APPROVERS
- ALLOW_REQUESTOR_APPROVAL
- AT_LEAST_ONE_RULE_MUST_APPLY
- EVALUATE_PRIORITIES_PER_LINE_ITEM
- USE_RESTRICTIVE_LINE_ITEM_EVALUATION

Special Pricing Management has header and line level attributes.

[Table 12-5](#) describes the header attributes.

Table 12-5 Header Attributes

Attribute	Description	Requiring Approval Types
ALLOW_EMPTY_APPROVAL_GROUPS	Whether to allow approval groups not to have members.	approval-group chain of authority, post-chain-of-authority approvals, pre-chain-of-authority approvals
CURRENCY_CODE	Currency Code	None
END_CUSTOMER_COUNTRY	End Customer Country	None
END_CUSTOMER_NAME	End Customer Name	None
IS_VAD	To find whether the partner is a distributor	None
MEMBERSHIP_TYPE	Partner Membership Type	None
PARTNER_COUNTRY	Partner Country	None
PARTNER_INDUSTRY	Partner Industry	None

Table 12–5 Header Attributes

Attribute	Description	Requiring Approval Types
PARTNER_LEVEL	Partner Level	None
PARTNER_NAME	Partner Name	None
PARTNER_TYPE	Partner type	None
REQUESTED_AMOUNT	Total Discount Amount	None
REQUEST_TYPE_CODE	Discount Type	None
SHIP_FROM_STOCK	Ship From Stock	None

Table 12–6 describes the line level attributes.

Table 12–6 Line Level Attributes

Attribute	Description	Requiring Approval Types
DISCOUNT_AMOUNT	Requested Discount Amount	None
DISCOUNT_TYPE	Discount Type	None
PRODUCT	Product	None
REQUESTED_QUANTITY	Requested Quantity	None
REQUESTED_UOM	Requested UOM	None

Interactions

Interactions are logged whenever the status changes for a special pricing request.

Table 12–7 provides information on seeded interaction messages that would be logged for the corresponding status changes.

Table 12–7 Interaction Messages

Message Name	Status Logged
OZF_SP_PENDING_LOG	Pending Approval
OZF_SP_REJECTED_LOG	Declined
OZF_SP_APPROVED_LOG	Approved
OZF_SP_CLOSED_LOG	Closed

Table 12–7 Interaction Messages

Message Name	Status Logged
OZF_SP_DRAFT_LOG	Draft

Offer Custom Setups

Three offer custom setups have been seeded for special pricing requests. The offer custom setups drive the prefix of the request.

- 1. Special Pricing Off Invoice - New inventory requests approved with the Off Invoice offer, use this setup.
- 2. Special Pricing Accrual - New inventory requests approved with the Accrual offer, use this setup.
- 3. Special Pricing ScanData - Ship and Debit special pricing request, use this setup.

12.8 Users and Security

Access to requests are controlled based on user types and permissions.

User Types

- Vendor User - These are employees in the vendor organization who can view special pricing requests they have created and requests that they have access to because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners.
- Vendor Manager - These are employees in the vendor organization who can view, update, approve and perform DQM on all special pricing requests.
- Vendor Administrator - These are employees in the vendor organization who can perform system setup activities.
- Vendor Approver - These are employees in the vendor organization who can approve special pricing requests. After they have performed the approval, they can continue to access the special pricing request.
- DQM Approver - These are employees in the vendor organization who can run DQM to link end customer or reseller information on the special pricing request into the master customer or partner record in the system.
- Partner User - These are employees in the partner organization who can view and update special pricing requests they have created and requests where they are identified as the Requestor.

- Partner Administrator - These are employees in the partner organization who can view and update all special pricing requests owned by their organization.

For information on setting up vendor users, see [Section 6.2.1, "Creating a Channel Manager"](#).

For information on setting up partner users, see [Section 3.3.2, "Creating a Partner"](#).

Permissions

- Super User Permission - [OZF_SPECIAL_PRICING_SUPERUSER] - Allows a vendor user to view, update, approve and perform DQM on all special pricing requests. Allows vendor users to edit the End Date of a special pricing request. Allows partner users to view and update all special pricing requests owned by their organization.
- DQM Permission - [OZF_SPECIAL_PRICING_DQM] - Allows a vendor user to view, update and perform DQM on all special pricing requests.

Setting Up Partner Funds Management

This chapter provides information on setups required for Partner Funds Management. Topics included are:

- [Section 13.1, "Overview"](#)
- [Section 13.2, "Setups"](#)
- [Section 13.3, "Profiles Options"](#)
- [Section 13.4, "Concurrent Programs"](#)
- [Section 13.5, "Lookups"](#)
- [Section 13.6, "Interaction with Other Modules"](#)
- [Section 13.7, "Seeded Data"](#)
- [Section 13.8, "Dependencies"](#)
- [Section 13.9, "Users and Security"](#)

13.1 Overview

Partner Funds Management enables partners to submit and check the status of fund requests and claims online. They can request funds for specific marketing activities and thus boost sales.

When they submit a request, it gets routed to the appropriate approver(s). Approvers are notified of the request and they review, approve, decline, or return the request. The approver can return the request asking the partner to provide additional information. After the partner resubmits the request and the request is approved, he/she can execute the marketing activity and submit a claim to redeem money from the vendor. When the partner submits a claim, it is routed to the claim approver who then validates the claim. When the claim gets approved, the vendor pays the amount.

Partners receive notifications about the fund request activity and can navigate directly from the notification into the associated fund request. Notifications are configured by the vendor and sent when the status changes, for example, when one of the fund requests is approved.

Partners can access a summary list of all the fund requests that they have access to in the system. They can build personal views to quickly find the fund requests that they are most interested in.

13.2 Setups

The following sections provide information on setups that are required for Partner Funds Management.

- [Section 13.2.1, "Setting Up Partner Fund Benefits"](#)
- [Section 13.2.2, "Setting Up Notifications"](#)
- [Section 13.2.3, "Setting Up Approvers in Oracle Approval Management \(AME\)"](#)
- [Section 13.2.4, "Setting Up Claims"](#)

13.2.1 Setting Up Partner Fund Benefits

Vendors can set up a program benefit to enable partners enrolled in that program to request channel marketing funds.

Use this procedure to set up a program benefit.

Prerequisites

None.

Steps

1. Log in as the channel administrator and navigate to Programs > Benefits > Benefit Administration page.
2. Select 'Soft Funds' from the create LOV and click **Go**.
3. In the Budget region, enter a default budget.

Budgets requests are generated automatically. Vendor approvers can change the budget sourcing to use any budget that they have security to see, based on the budget security.
4. In the Notifications region, attach notifications to the benefit.

When a partner fund benefit is setup, notifications can be set up as well. Vendors can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of.
5. Click **Apply** to save the benefit.

13.2.2 Setting Up Notifications

Vendors can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of.

[Table 13–1](#) lists seeded notifications. Customers can add more notifications.

Table 13–1 Notifications

Notification Name	User Role	Status
Request Created – Channel Manager Notification	Channel Manager	Draft
Request Submitted – Partner Notification	Partner Contact, Soft Fund Super User (Partner)	Pending Approval
Request Submitted – Vendor Notification	Vendor Channel Manager, Vendor Approvers, Soft Fund Super User (Vendor)	Pending Approval
Request Approved – Partner Notification	Partner Contact, Soft Fund Super User (Partner)	Approved

Table 13–1 Notifications

Notification Name	User Role	Status
Request Returned – Partner Notification	Partner Contact, Soft Fund Super User (Partner)	Returned
Request Cancelled – Partner Notification	Partner Contact, Soft Fund Super User (Partner)	Void
Request Declined – Partner Notification	Partner Contact, Soft Fund Super User (Partner)	Declined

13.2.2.1 Defining Notification Messages for the Fund Request

E-mail notifications are handled by Oracle Workflow. Some notification messages are defined using the Oracle Workflow builder tool and some notification messages are seeded.

Use this procedure to define notification messages.

Prerequisites

None.

Steps

1. Launch the Workflow Builder 2.6 client application. Ensure that the access level is set to 100. Verify this in Help > About Oracle Workflow Builder 2.6. This ensures that the customization is preserved.
2. Navigate to File > Open > Database radio button. Enter the apps login and database connection and click **OK**.
3. In the Show Item Type popup window, select Fund Request Benefit Workflow and click **OK**.
4. Expand the Messages Node and see notification messages that have been seeded for Fund Request.
5. At this point, you can copy an existing message to use as your new message. You can reference any attribute that has been seeded out of the box in the message template.

Important: The Internal Name you give your message has to conform to the naming convention of `FUND REQUEST STATUS CODE####` where `####` is a 4 digit number starting with 1000. For example, `DECLINED1001`.

6. Save your changes and exit. You should see your newly defined workflow message appear in the notification section of the deal benefit.

Table 13–2 lists fund request statuses and the corresponding fund request code.

Table 13–2 Fund Request Statuses

Status	Code
Draft	DRAFT
Pending Approval	SUBMITTED_FOR_APPROVAL
Returned	RETURNED
Approved	APPROVED
Declined	DECLINED
Closed	CLOSED
Void	VOID

13.2.3 Setting Up Approvers in Oracle Approval Management (AME)

When a request is created, it has to be approved by the approver. The approver views the request and approves or declines it. Approvers are internal employees or vendors that are defined in Oracle Approval Management (AME). Approvers are assigned to review requests and can perform the following:

- Validate the information entered by the partner.
- Reassign requests to another vendor user to approve or decline requests. The newly assigned user must be able to access the fund request.

Vendors can configure the approval process. For example, they can have a single approver or multiple approvers. Once a request is approved, it is locked.

Use this procedure to set up approvers.

Prerequisites

None

Steps

1. Log in to the self-service application as an Approvals Management Application Administrator and navigate to Approvals Management Application Administrator > Approvals.

The Approvals Management page appears.

2. Click the Conditions tab.

Conditions tab

1. Select 'Fund Request' transaction type and click **Continue**.
2. Click **Add a Condition**, select the 'Ordinary' option and click **Continue**. The window to select the condition's attribute appears.
3. Select the attribute on which you want to set a condition.
4. Click **Create Condition** to create the condition.

You can add any number of conditions.

5. Click the Groups tab.

Groups Tab

1. Click **Add Group** and provide a name and description and click **Create Group**.

The group is created and the Edit Approval Group window appears.

2. Click **Add Approver**. Search for an approver, select the approver and click **Create Member**.

If there is more than one approver, pick the order in which the approvals have to be performed. The approver is added and the Edit Approval Group window appears.

Click the Rules tab.

Rules Tab

1. Select 'Fund Request' transaction type and click **Continue**.
2. Click **Add Rule and Usage**. Enter a description, select Rule Type as 'list-creation-rule', select the start date (current date) and end date appropriately. Click **Continue**. The 'Add a Rule-Step 2' window appears.
3. Select the 'chain of authority includes an approval group' option and click **Continue**. The Add a Rule-Step 3 window appears.
4. Select the approval group created above and click **Continue**. The 'Add a Rule-Step 4' window appears.

5. In the 'Ordinary-Condition Attributes' multi-select field, select attribute 'Customer Country' and click **Continue**. The 'Add a Rule-Step 5' window appears.
6. In the 'Ordinary Conditions' field, check the option for 'Customer Country is true' and click **Continue**.

The rule is created and the approval setup is complete.

Once requests are submitted from the fund request module, the approvals engine processes the rule defined for fund requests and returns approvers according to the approver type chosen.

13.2.4 Setting Up Claims

The following setups are required to set up claims.

Custom Setup

A custom setup can be seeded for fund request claims. Creating different custom setups provides the following benefits:

- A different prefix can be used for fund request claims and it applies to the claim number.
- Approvals can be routed differently based on this setup.
- The claim validation process can be different.

Custom setups are created from Oracle Trade Management User > Administration > Trade Management > Setups > Custom Setups.

Claim Reasons

Partners can give specific reasons when submitting claims for fund requests. Reasons that can be seen by a partner user have to be flagged for 'Partner Access'. Claim reasons are setup from Oracle Trade Management User > Administration > Trade Management > Claim > Reasons.

Claim Defaults

Claim defaults allows setting up of default custom setup, claim type and claim reason for fund request claims. Claim defaults are setup from Oracle Trade Management User > Administration > Trade Management > Claim > Claim Defaults.

Trade Profiles

Trade Profiles allow defaulting of payment methods, vendor and vendor site mapping for a partner. Trade profiles are setup from Oracle Trade Management User > Administration > Trade Management > Customer > Trade Profile.

For more information, see the *Oracle Trade Management Implementation Guide*.

13.3 Profiles Options

Table 13–3 lists the profile options that need to be set up for Partner Funds Management.

Table 13–3 Profiles Options

Profile Name	Required -Yes/ Optional	Level - Site/ Application/ Responsibility /User	Setting - Available setting choices	Description
OZF_SF_ GRACE_ DAYS	Optional	Site, Responsibility	Numbers	Used to set up grace days to close fund requests. It is the number of days past the approved date. The value is zero if the profile is not set.
OZF_SF_ DEFAULT_ BENEFIT	Optional	Site, Responsibility	List of fund request benefits	Used to set up default benefit for fund requests. For deployments that do not use partner programs, this will be the default benefit that appears.
OZF_SF_ DEFAULT_ APPROVER	Optional	Site, Responsibility	List of internal employees	Request is sent to this default approver when Oracle Approvals Manager does not find any rule that matches the fund request criteria.

13.4 Concurrent Programs

The 'OZF-TM: Release Committed Budget Amount After Grace Period' concurrent program closes a fund request after the grace period, makes the Submit Claim button no longer available, and reconciles the liabilities. It can be scheduled to run periodically.

13.5 Lookups

Table 13–4 lists lookups that need to be set up for Partner Funds Management.

Table 13–4 Lookups

Lookup Name	Lookup Type Code	Type - System/ Extensible / User	Value	Description
Request Status	OZF_REQUEST_STATUS	System	DRAFT APPROVED CLOSED DECLINED VOID SUBMITTED_FOR_APPROVAL RETURNED	Draft Approved Closed Declined Void Pending Approval Returned
Request Class	OZF_REQUEST_CLASS	System	SOFT_FUND SPECIAL_PRICE	Soft Fund Special Price
Request Type	OZF_REQUEST_TYPE	System	SOFT_FUND	Soft Fund
Partner Funds Decline Code	OZF_SF_DECLINE_CODE	Extensible	COLLATERAL DUPLICATE INVALID	Collateral Did Not Meet Criteria Duplicate Request Invalid Request
Partner Funds Return Code	OZF_SF_RETURN_CODE	Extensible	COLLATERAL OTHER MISS_INFO	Collateral Submission Requested Other Request Missing Information
Performance Unit	OZF_PERFORMANCE_UOM	System	AMOUNT NUMBER	Amount Number

Table 13–4 *Lookups*

Lookup Name	Lookup Type Code	Type - System/ Extensible / User	Value	Description
Marketing Fund Source	OZF_FUND_SOURCE	System	SOFT_FUND FUND CAMP DELV EVEH EVEO OFFR EONE OPTN PTNR USER PRIC CSCH VEND	Soft Fund Budget Campaign Deliverable Event Event Schedule Offer One Off Event Other Partner Partner Person Price List Schedule Vendor
Performance Objectives	OZF_PARTNER_PERFORMANCE	Extensible	LEAD REVENUE	Lead Revenue

13.6 Interaction with Other Modules

This section lists interactions with other Oracle E-Business Suite products.

Oracle Trade Management - Offers

When a fund request is approved, an offer of type lumpsum is generated. All lumpsum offers created use the seeded custom setup 'Soft Fund - Lumpsum'.

Oracle Trade Management - Budgets

After a fund request is approved, the budget request is sent for approval.

Budget request approval can be enabled or disabled for funds requests from the offer custom setup. The custom setup for partner fund is 'Soft Fund - Lumpsum'. To enable budget request approval, navigate to Oracle Trade Management > Administration > Setup > Custom Setup > Soft Fund - Lumpsum > Components. For the Budget Approval component, select the Available Attributes checkbox.

Approvers can change the budget that will be used to request fund from the Budgets tab. These approvers can only view budgets they have access to.

Oracle Trade Management - Claims

After a request is approved and the partner has executed the desired activity, he/she can submit a claim to collect payment. Claims are validated in Oracle Trade Management. Claims have to be submitted in the same vendor organization in which the fund request is approved.

For more information on claims, see the *Oracle Trade Management Implementation Guide*.

13.6.1 Tracking Financial Liability

Each budget has five kinds of budgeted amounts. They are Planned, Committed, Utilized, Earned and Paid. The planned amount increases when a request is made on that budget. When the budget request is approved, the committed amount increases. The utilized and earned amounts increase when the offer is approved. The paid amount increases after claims are closed. In this flow, liabilities are earnings that are tracked at the expense lines.

13.7 Seeded Data

The following data is seeded for this functionality:

Permissions

OZF_SOFT_FUND_SUPERUSER: Vendor users with this permission can view, update and approve all requests. Partner users with this permission can view and update all requests made by their organization.

Notifications

E-mail notifications are handled by Oracle Workflow. Some notification messages are defined using the Oracle Workflow builder tool and some notification messages are seeded. Notification messages are contained in the workflow item type

OZFSPBEN - 'Soft Fund Benefit Notifications'. Seeded messages in this workflow are:

- Request Created - Vendor Notification
- Request Submitted - Partner Notification
- Request Submitted - Vendor Notification
- Request Approved - Partner Notification
- Request Returned - Partner Notification
- Request Cancelled - Partner Notification
- Request Declined - Partner Notification

OAM Transaction Types and Attributes

The transaction type for fund requests is seeded and the value is 'OZF: Soft Fund Request'.

The following mandatory attributes are seeded.

- ALLOW_DELETING_RULE_GENERATED_APPROVERS
- ALLOW_REQUESTOR_APPROVAL
- AT_LEAST_ONE_RULE_MUST_APPLY
- EVALUATE_PRIORITIES_PER_LINE_ITEM
- USE_RESTRICTIVE_LINE_ITEM_EVALUATION

Partner Funds Management has header and line level attributes.

[Table 13–5](#) describes the header attributes.

Table 13–5 Header Attributes

Attribute	Description	Requiring Approval Types
ALLOW_EMPTY_APPROVAL_GROUPS	Whether to allow approval groups not to have members.	approval-group chain of authority, post-chain-of-authority approvals, pre-chain-of-authority approvals
CURRENCY_CODE	Currency Code	None

Table 13–5 Header Attributes

Attribute	Description	Requiring Approval Types
IS_VAD	To find whether the partner is a distributor	None
MEMBERSHIP_TYPE	Partner Membership Type	None
PARTNER_AMOUNT	Partner Amount	None
PARTNER_COUNTRY	Partner Country	None
PARTNER_INDUSTRY	Partner Industry	None
PARTNER_LEVEL	Partner Level	None
PARTNER_NAME	Partner Name	None
PARTNER_TYPE	Partner Type	None
REQUESTED_AMOUNT	Requested Amount	None
SOFT_FUND_BENEFIT	Soft Fund Benefit	None
TOTAL_AMOUNT	Total Amount	None
ACTIVITY	Activity	None

[Table 13–6](#) describes the line level attributes.

Table 13–6 Line Level Attributes

Attribute	Description	Requiring Approval Types
PRODUCT	Product	None
GEOGRAPHY	Geography	None
PERFORMANCE OBJECTIVES	Performance Objectives	None

Interactions

Interactions are logged whenever status changes for a fund request.

[Table 13–7](#) provides information on seeded interaction messages that would be logged on the corresponding status changes.

Table 13–7 Interaction Messages

Message Name	Status Logged
OZF_SF_PENDING_LOG	Pending Approval
OZF_SF_REJECTED_LOG	Declined
OZF_SF_APPROVED_LOG	Approved
OZF_SF_RETURNED_LOG	Returned
OZF_SF_CLOSED_LOG	Closed
OZF_SF_DRAFT_LOG	Draft

Offer Custom Setups

New custom setup has been seeded for lumpsum offers created by fund requests. The suffix defined in this offer custom setup becomes the prefix for the fund request number.

13.8 Dependencies

Fund Requests is dependent on the following features:

- [Section 13.8.1, "Expense Items"](#)
- [Section 13.8.2, "Setting Up Activity"](#)
- [Section 13.8.3, "Defining Performance Objectives"](#)
- [Section 13.8.4, "Setting Up Budget Category"](#)
- [Section 13.8.5, "Setting Up Budgets"](#)
- [Section 13.8.6, "Setting Up Approval Rule for Budget Requests"](#)
- [Section 13.8.7, "Offers"](#)
- [Section 13.8.8, "Geography"](#)

13.8.1 Expense Items

The breakdown of expenses are setup as marketing mediums in Oracle Trade Management. The benefit selected drives the activities that appear. The marketing activity selected, drives expense breakdown items that get displayed. Accruals that are to be paid on approval of the fund request are tracked against these marketing

mediums. Marketing mediums can be created from Oracle Trade Management User > Administration > Trade Management > Setup > Marketing Medium.

For more information, see *Oracle Trade Management User Guide*.

13.8.2 Setting Up Activity

Use this procedure to create a marketing activity.

Prerequisites

Marketing mediums must exist.

Steps

1. Log into Oracle Marketing as a Oracle Trade Management User and navigate to Administration > Trade Management > Setup > Activity page.
2. Click **Create** and enter the following details in the Create Activity page.

Activity Name, Activity Type, select the Active check box, Marketing Media - select required mediums (expense items) from the LOV. These are the expense items that are available when a fund request is made for performing this activity.

An activity is created.

13.8.3 Defining Performance Objectives

The performance objective is the outcome that is expected for a marketing activity.

Use this procedure to enter values that are populated as Performance Objectives while submitting a fund request. This is displayed on the fund request to capture expected performance results, and on the claim to capture actual performance results.

Prerequisites

None.

Steps

1. Log into Oracle Forms as a Oracle Trade Management Administrator and navigate to Setup > Lookups.

2. In the Lookups page, query for the lookup type Performance Objectives and enter performance objectives as lookup codes.

For example, Leads generated, Revenue expected. The values for lookup are saved and these values appear as Performance Objectives on the fund request and the fund request claim.

13.8.4 Setting Up Budget Category

Use this procedure to set up a budget category.

Prerequisites

An activity must exist.

Steps

1. Log into Oracle Marketing as a Oracle Trade Management User and navigate to Administration > Trade Management > Setup > Activity page.
2. Click the Category side navigation link. The Categories page appears.
3. Click **Create** and enter the following details in the Create Category page.

Category Name, select the Enabled check box, Created for, Activity.

A category for the budget is created.

13.8.5 Setting Up Budgets

Marketing administrators can define budgets from the Oracle Trade Management Budgets module. Every budget belongs to a budget category. Budget categories are set up with different activities that can be used. Depending on the benefit that is selected, the activity values appear.

Use this procedure to set up budgets.

Products specified in fund request do not get validated against products in budget.

Prerequisites

Budget categories must exist.

Steps

1. Log into Oracle Marketing as a Oracle Marketing Super User and navigate to Oracle Marketing > Budget.

2. Click the Budget tab.
The Budgets summary screen appears.
3. Click **Create** and enter the following details.
Setup Type, Name, Category, Budget Amount and Start Date.
4. Click **Create**.
The budget is created in draft status.
5. Click **Request Approval**.
In the Preview Approval page, ensure that the Active checkbox is selected and User Status is 'Active'.
6. Click **Confirm**.
If the owner and approver are not the same user, the approver has to approve the budget via Workflow > Worklist and drill into the budget and click **Approve**. The budget is approved automatically and the status changes to 'Active' if the owner and approver are the same user.

13.8.6 Setting Up Approval Rule for Budget Requests

Use this procedure to set up approval rules for a budget request.

Prerequisites

The custom setup is configured to require budget approval.

Steps

1. Log into Oracle Marketing as a Oracle Trade Management User and navigate to Administration > Trade Management > Setup > Approval Rule.
The Approval Rules page appears.
2. Click **Create**.
The Create Approval Rules page appears.
3. Enter necessary details in the Create Approval Rule page.
4. Select 'Offer' from the Approval Rule For drop-down list.
5. Select 'Lumpsum' from the Offer Type drop-down list.
6. Select 'Soft Fund - Lumpsum' from the Setup Type drop-down list.

7. Select 'Budget' from the Approval Type drop-down list.
8. Enter the Minimum Amount.
9. Click **Create**.

The Approval Rule Details page appears.

10. Enter details in the Approvers region and click **Update**.

The approver is added to the approval rule.

13.8.7 Offers

When a request is approved, a lumpsum offer is generated in the background. The offer is used to track funds committed for the fund request. Vendors can:

- Submit a claim using Oracle Trade Management by entering the request number.
- Link offers associated with a fund request to a campaign schedule.

For more information, see *Oracle Trade Management User Guide*.

13.8.8 Geography

The geographical regions are regions where the marketing activity is executed. Geographies are set up in Oracle Forms in Territory Manager > Territory Administration.

For information on setting up territories, see [Assigning User Management Roles \(JTT Roles\) to Vendor Users \(Employees\)](#) in Chapter 6, "Setting Up the Channel Manager Dashboard".

13.9 Users and Security

Access to requests are restricted by user types and permissions.

User Types

- Vendor User - These are employees in the vendor organization who can view fund requests they have created and requests that they have access to because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners.
- Vendor Manager - These are employees in the vendor organization who can view, update, and approve all fund requests.

- Vendor Administrator - These are employees in the vendor organization who can perform system setup activities.
- Vendor Approver - These are employees in the vendor organization who can approve fund requests. After they have performed the approval, they can continue to access the fund request.
- Partner User - These are employees in the partner organization who can view and update fund requests they have created and requests where they are identified as the Requestor.
- Partner Administrator - These are employees in the partner organization who can view and update all fund requests owned by their organization.
- For information on setting up vendors users, see [Section 6.2.1, "Creating a Channel Manager"](#).
- For information on setting up partner users, see [Section 3.3.2, "Creating a Partner"](#)

Permissions

- Super User Permission - [OZF_FUND_REQUEST_SUPERUSER] - Allows a vendor user to view, update, and approve all fund requests. Allows a partner user to view and update all fund requests owned by their organization.

Profiles, Concurrent Programs and Lookups

This chapter describes how to set up profile options, run concurrent programs and set up lookup vales. Topics included are:

- [Section A.1, "Setting Up Profile Options"](#)
- [Section A.2, "Running Concurrent Programs"](#)
- [Section A.3, "Lookups"](#)

A.1 Setting Up Profile Options

Use the following procedure to set a profile option.

Prerequisites

None.

Steps

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

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

A.2 Running Concurrent Programs

The procedure for running concurrent programs is the same for all Oracle applications. Use this procedure to run OCM concurrent processes.

Steps

1. Log into Oracle Forms and select the Oracle Sales Administrator responsibility.
2. Double-click **Concurrent Requests**.
3. Double-click **Run**.
4. Select the Single Request radio button.
5. Click **OK**.
6. Search for the concurrent request that you want to run.
7. Click **Submit**.
8. Select from the search results.
9. Click **OK**.
10. Click **OK** to run the concurrent request.

For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

A.3 Lookups

[Table A-1](#) lists lookups that need to be set up for a benefit. Vendors can add more values to the existing list.

Table A–1 Lookups

Lookup Type	Description	Value
PV_BENEFIT_ENTITY_STATUS	Approved	APPROVED
	Awaiting For Partner Acceptance	AWAITING_FOR_PARTNER_ACCEPTANCE
	Closed by Vendor	CLOSED_BY_VENDOR
	Closed. Dead Lead	CLOSED_DEAD_LEAD
	Closed. Fee Paid	CLOSED_FEE_PAID
	Closed. Lost Opportunity	CLOSED_LOST_OPPTY
	Compensation Cancelled	COMP_CANCELLED
	Declined	DECLINED
	Draft	DRAFT
	Expired	EXPIRED
	Extended by Vendor	EXTENDED_BY_VENDOR
	Negotiating Compensation	COMP_BEING_NEGOTIATED
	Payment Being Processed	PAYMENT_BEING_PROCESSED
	Pending Approval	PENDING_APPROVAL
	Pending Customer Review	PENDING_CUSTOMER_REVIEW
	Processing Compensation	PROCESSING_COMPENSATION

Glossary

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

Assignment

When an opportunity is matched to partners.

Assignment Routing

Process that routes an opportunity assignment to partners.

Attribute

Oracle Partner Management provides a flexible profiling framework to capture and track the attributes of a partner. 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. 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.

Benefit

Oracle Partner Management extends benefits to partners based on their program participation.

Campaign

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

Channel Administrator

They have access to administrative setups to define profile attributes, program benefits such as referral and deal registration initiatives as well as setups, notifications and partner users accounts.

Channel Manager

They own the relationship between the vendor and the partner and bear responsibility for managing and distributing information to partners. They work with the partner, assign and maintain opportunities, approve assignments, approve submitted referrals, special pricing requests, fund requests, and deals. Depending upon business rules, they may approve or reject opportunities being assigned to partners. They can maintain opportunities depending upon access and business rules.

Channel Manager Dashboard

The channel manager dashboard provides you an easy to use, configurable user interface to help you with your day to day responsibilities. It provides you with a 360 degree view of your partners and activities, thereby enabling you to make informed decisions.

Channel Manager Timeout

This is the date by which all channel managers must approve or deny the opportunity assignment.

Customer

A purchaser of products or services.

Compensation

If a partner's referral results in orders in the system, they have to be compensated for the same. The compensation rates vary from initiative to initiative and by product. Once a partner is compensated, the referral is closed.

Concurrent Manager

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

Deal Registration

When a partner resells your products, there is often a conflict between your direct sales force and your partner network. Deal Registration enables partners to submit opportunities and receive your commitment not to compete directly and support the partner on the deal.

Distributor

A business that buys, warehouses, ships, invoices and resells; a party that acts as an intermediary in order and inventory management.

DQM

Data Quality Management (DQM) is a tool that is used to check for potential duplicate customers, contacts, address and/or contact points for a given customer, contact, address or a contact. The system finds potential duplicates using rules defined within DQM.

Enrollment

Enrollments enables you to administer and expedite the registration of partners into Oracle Partner Management by enrolling them into programs.

Existing Inventory

When a partner has already bought the product and wants a discount for past purchases.

Expense Breakdown

This is the breakdown of expenses for the marketing activity. The line items appearing within the Expense Breakdown are based on the Activity you selected.

Forms

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

Forms Server

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

Framework

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

Fund Request

The request a partner submits (or a vendor on behalf of a partner) in order to request soft fund dollars from you.

Fund Request Claim

After a fund request is approved and the partner has executed the planned marketing activity, they can submit a claim to redeem money from you.

Hyperlink

A link to another page.

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 you.

Joint Selling

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

Joint Assignment

This routing option supports collaborative selling. The opportunity is offered to multiple partners for fulfillment. The partners come together and bring their expertise to win the deal.

Managed Partner

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

Manufacturer

A business or person that produces one or more products. (also known as vendor)

Marketing Activity (Partner Fund)

This is the marketing activity for which funding is being requested.

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.

Multiple-Parallel

In this routing option, you can also broadcast the opportunity to multiple partners for review at the same time. However, only the partner who accepts it first, will win the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner LOV window.

Multiple Serial

This is a variation of the single routing option and you can create an ordered list of partners. The opportunity will be offered to the first partner for review. If the partner accepts it, the assignment is successful. If the partner declines it, it is offered to the second partner in the list for review. You need to select at least two partners from the partner LOV window.

New Inventory

When a partner requests a special price for a new purchase and you approve it, the partner can close the sale to the end-customer at a discounted rate.

Note Status

There are three statuses available for notes:

- Public: Other vendor users can see comments.
- Publish: Partner users and other vendor users can see comments.
- Private: Only you can see comments.

Note Type

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

Offer

Offers are generated in the background when approving a special pricing request to track the special pricing discount that has been approved. There are three types of offers:

- **Accrual Offer** - The discounted amount will be accrued and the partner will be paid later.
- **Off-Invoice Offer** - The discounted amount will be paid to the partner off the invoice.
- **Scan Data Offer** - If the special pricing request is being fulfilled from existing inventory, the system will generate a Scan Data offer.

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.

Partner

Partners are people or organizations with whom you can have a business relationship. Every partner organization is a distinct legal entity with its own challenges, market pressures, customer pressures, and intellectual capital.

Partner Administrator

The partner administrator is the primary contact of the organization and is responsible for administering all opportunities assigned to the partner.

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 or declines opportunities on behalf of the partner.

Partner Dashboard

The partner dashboard enables partners to enroll into programs, manage memberships, view and manage company profile, manage users, view product catalog, place orders, view order status, submit referrals, register deals, request soft funds, request discounts, accept opportunities, and work on assigned opportunities.

Partner Fund

Partner funds enable you to better manage and distribute channel marketing funds to your channel partners. You can provide funds for a specific time period and base it on fiscal periods of your organization.

Partner Funds Liability

The liability is the amount of money that you have committed to pay out to your channel partners for marketing activities but have not yet paid out.

Partner List

Oracle Partner Management integrates with Oracle Marketing to enable you to generate partner lists. These lists can then be used to run marketing campaigns for partners. Based on profile attributes, you can create a list and save your search. Based on the search criteria, partners will be displayed and this can be created as a list.

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.

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 User

They can use the transactional system and request for a special price, request for funds, submit referrals, and register deals. They can also request for an account via self-service and these requests will be routed to partner administrators for approval. They can manage a user's profile, preferences, view their company profile, manage objects that they have access to and can also purchase things from the store.

Personalize

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

Program

Programs are used to segment partners and provide different benefits to partners.

Program Benefit

Programs are used to segment partners and provide different benefits to partners. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, referrals, deals, and special pricing.

Prospect

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.

Referral

Partners can submit referrals and receive a commission for referring the business. Partners can refer business opportunities that they cannot fulfill directly. For example, the customer is interested in a product that the reseller does not resale. The partner can then submit a referral and receive a percentage of the revenue generated.

Reseller

A business that buys goods from a manufacturer and resells them to customers unchanged.

Similar Special Pricing Request

Special pricing provides approval with a decision support tool to compare similar requests and link similar requests. This mechanism ensures legal compliance with U.S. pricing laws. It essentially enables you to ensure similar pricing. Regardless of your geography, it enables you to ensure the same or similar pricing for all special pricing requests for a particular end-customer deal.

Special Pricing

Special Pricing enables you to automate and streamline the special pricing process in which your partners request discounts on sales deals. You can respond quickly and intelligently to your partners' requests for special, discounted pricing, thus closing more sales and increasing partner loyalty.

Special Pricing Claim

When a special pricing request is approved, partners can close the sale at the discounted price and submit a claim to collect payment.

Special Pricing Request

A special pricing request enables partners to request discounted pricing from you. They can request discounts on competitive sales deals, specific end-customer deals, and on inventory that they have not been able to move.

Special Pricing Request Type

The request types are:

- **Meet Competitor Price:** When a partner wants to match a competitor's price, they can ask you to reduce the price to complete a sale.
- **Bid Request:** When a partner wants to win a deal for a specific end-customer.
- **Blanket Request:** When a partner has inventory in his warehouse and has not been able to move it, they can ask for a discount to move the unsold inventory.

Special Pricing Liability

The liability is the amount of money that you have committed to pay out to your channel partners for discounts but have not yet paid out.

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 opportunity is routed only to one partner.

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.

TAP

Territory Assignment Program. This is a CRM common module that enables businesses to allocate resources based on territory definitions.

TCA or Trading Community Architecture

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

Vendor

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

Workflow

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

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

Workflow Attributes

Workflow attributes control the behavior of the workflow.

Workflow Monitor

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

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