Oracle® Partner Management

Partner User Guide

Release 11*i*

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Oracle Partner Management Partner User Guide, Release 11*i*

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Contents

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Preface

Welcome to the Oracle Partner Management Partner User 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.

How To Use This Guide

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

- Chapter 1 provides an introduction and the key features of Oracle Partner Management in this release.
- Chapter 2 provides information on features of the partner dashboard and how to use the dashboard.
- Chapter 3 provides information on how you can register yourself as a partner and the member types that you can register under.
- Chapter 4 provides information on how you can maintain your personal information and your company information.
- Chapter 5 provides information on how you can enroll into programs, upgrade and renew your memberships into programs.
- Chapter 6 provides information on how you can manage opportunities by reviewing, accepting, declining and updating opportunities.

- Chapter 7 provides information on referral management, how you can submit new leads and get compensated.
- Chapter 8 provides information on deal registration, how you can avoid competition on a sales deal and obtain sales support.
- Chapter 9 provides information on how you can request discounts from a vendor and how you can claim the discount.
- Chapter 10 provides information on how you can request funds from a vendor to carry out your marketing activities and how you can submit claims.

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1

Introduction to Oracle Partner Management

This chapter provides an overview of Oracle Partner Management and discusses its key features. Sections in this chapter include:

- Section 1.1, "Overview"
- Section 1.2, "Oracle Partner Management Key Features"
- Section 1.3, "What's New in this Release"

1.1 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 Oracle Partner Management Key Features

The key features are:

- Section 1.2.1, "Partner Dashboard"
- Section 1.2.2, "Programs and Enrollment"
- Section 1.2.3, "Opportunity Management"
- Section 1.2.4, "Referral Management"
- Section 1.2.5, "Deal Registration"
- Section 1.2.6, "Special Pricing Management"
- Section 1.2.7, "Partner Funds Management"

1.2.1 Partner Dashboard

The partner dashboard is your single entry point for all your transactions on the vendor system. You can:

- Enroll into partner programs.
- Manage your memberships including upgrades and renewals.
- Access 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, create quotes.
- Maintain the partner contact and company profile.
- View notifications.
- Access 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 dashboard displays a summary of transactions and you can click a link to navigate to the transactional system. The list of transactions available depends on your enrollments and your role. For example, if you are authorized to resell a vendor's products, you might be assigned sales opportunities.

The key features are:

- Quick Links Bin - Oracle Partner Management provides bins to enable you to access your benefits and services.
- 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 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. A new organization can also register itself via self-service registration.
- 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.

1.2.2 Programs and Enrollment

Oracle Partner Management enables you to be part of a vendor’s indirect sales force by enrolling into programs designed by the vendor. Enrolling into these programs provide the utility to simplify your relationship with the vendor. Benefits that are attached to programs can provide you with new business flow functionality including submitting a referral, registering a deal, requesting partner funds, and submitting a special pricing request.

1.2.3 Opportunity Management

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 you.

An opportunity can be assigned to the vendor’s direct or indirect sales channel.

- Sales representatives from the vendor’s organization can fulfill direct opportunities.
- Vendors can route indirect opportunities to you for fulfillment.

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

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

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.

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, vendors can manually invoke the engine to find the best partner for fulfilling the opportunity. Once vendors 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

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

1.2.4 Referral Management

Referral Management enables you to refer business opportunities, that you cannot fulfill directly, to the vendor's organization. For example, the customer is interested in a product that you do not sell. You can submit a referral to the vendor and receive a percentage of the revenue.

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

You can receive notifications about the referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by the vendor and sent when the status changes, for example, when one of your referrals is approved.

You can access a summary list of referrals that you have access to. You can build personal views to quickly find referrals that you are most interested in.

The key features are:

- You can submit referrals and track progress of the referral.
- You can easily search for referrals and download your search to an excel spreadsheet.
- You can review and accept the compensation online.

1.2.5 Deal Registration

When you resell the vendor products, there can be a conflict with the vendor's direct sales force on specific opportunities. Deal Registration enables you to submit opportunities and receive the vendor's commitment not to compete directly and provide you support on the deal.

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

You can 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 one of your deal registrations is approved.

You can access a summary list of deal registrations that you have access to. You can build personal views to quickly find deal registrations that you are most interested in.

The key features are:

- You can register deals and work on the deal.
- You can easily search for deals and download your search to an excel spreadsheet.
- After approval, you gain access to the generated opportunity based on the deal registration information. You can work on the opportunity, create a quote and place an order.

1.2.6 Special Pricing Management

Special Pricing Management enables you to submit and check the status of special pricing requests and claims online. A special pricing request enables you to request discounted pricing from the vendor. You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

When you submit 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. After your special pricing request has been approved, and you have closed the sale, you can submit a claim to receive the discount that was approved. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the discount amount.

You will receive notifications about the special pricing request activity and you 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 one of your special pricing requests is approved.

You can access a summary list of all the special pricing requests that you have access to. You can build personal views to quickly find the special pricing requests that you are most interested in.

The key features are:

- You can request special pricing and view the status of your special pricing requests.
- You can create claims and view outstanding special pricing requests.

1.2.7 Partner Funds Management

Partner Funds Management enables you to submit and check the status of fund requests and claims online. You can request funds for specific marketing activities and thus boost sales.

When you submit 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. The approver can return the request asking you to provide additional information. After you resubmit the request and the request is approved, you can execute the marketing activity and submit a claim to redeem money from the vendor. When you submit a claim, it will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the amount.

You will receive notifications about the fund request activity and you can link 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 your fund requests is approved.

You can access a summary list of all the fund requests that you have access to. You can build personal views to quickly find the fund requests that you are most interested in.

The key features are:

- You can request funds, review fund request information, view fund request status, and submit collateral for approval.
- You can also create claims.

1.3 What's New in this Release

The following features are added for this release:

- Partner Dashboard
- Referral Management
- Deal Registration
- Special Pricing Management
- Partner Funds Management

1.3.1 Enhancements to Existing Functionality

The programs and enrollments features are enhanced.

Programs and Enrollment

- Distributor Initiated Invitation - Distributors have the ability to invite their managed partners or resellers to join programs.
- Renewal Process - You can renew your memberships into multiple programs at one time. If you choose to renew multiple memberships at one time, the system presents a consolidated questionnaire to collect your profile information, summary of all applicable terms and conditions, and consolidated payment information.
- Benefits Framework - Oracle Partner Management extends benefits to you based on your program participation. You can refer business, register deals, request for discounts, funds and place orders.
- Proforma Invoice - You can now view a pro forma invoice inclusive of local taxes, during the program enrollment process.

2

Partner Dashboard

This chapter provides information on the partner dashboard. Sections in this chapter include:

- Section 2.1, "Overview"
- Section 2.2, "Bins"

2.1 Overview

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

- Enroll into partner programs.
- Manage your 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 notifications.
- Access content published by the vendor.

The dashboard displays a summary of transactions and you can click a link to navigate to the transactional system. The list of transactions available depends on your enrollments and role. For example, if you are authorized to resell a vendor's products, you might be assigned sales opportunities.

2.2 Bins

When you first log into the dashboard, you can see bins such as Quick Links bin, Renewals bin, Upgrade bin, Available Programs bin, and My Opportunities bin.

- Section 2.2.1, "Quick Links"
- Section 2.2.2, "Available Programs"
- Section 2.2.3, "Renew Programs"
- Section 2.2.4, "Upgrade Programs"
- Section 2.2.5, "My Opportunities"
- Section 2.2.6, "Welcome"

2.2.1 Quick Links

This bin provides links to the transactional system, such as referrals, deal registrations, opportunities, special pricing, claims, fund requests and messages.

The transactions available to you depend on the following:

- Benefits - You have to be entitled to use each type of benefit.
- User role within the partner organization - You can access transactions that you created or are assigned to you. For example, if an opportunity is assigned to you, you can see that opportunity. If you created a referral, you can view the referral. Partner administrators can access all transactions created by any user or transactions assigned to any user within their organization.

2.2.2 Available Programs

This bin displays new programs and programs that have incomplete enrollments. The bin is displayed only to the partner administrator. The link on the program name navigates to the program details page where the program is detailed for the partner to evaluate. If the user clicks on the 'Enroll' button, they can navigate to the questionnaire page for enrolling in that program.

2.2.3 Renew Programs

This bin displays programs that are up for renewal. The bin is available only to partner administrators to assist them in managing their program memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link. The renew option will appear to the user when the program is up for renewal.

2.2.4 Upgrade Programs

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

2.2.5 My Opportunities

This bin displays all the opportunities where the routing status is 'Offered'. You can navigate to the opportunity link to go to the Opportunity Detail page and view details of the opportunity. You must have the permission OPPTY_CONTACT to view this bin.

2.2.6 Welcome

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

3 Partner Registration

This chapter explains how you can register yourself as a partner and different member types that you can register under. Sections in this chapter include:

3.1 Overview

Partner registration enables vendors to administer and expedite your self-service registration and enrollment into programs.

Registration involves the creation of a user and company account following the collection of general data from you. User management allows you to use the self-registration process to register your company as a partner. During the registration process, you can also register yourself as the contact of your organization.

3.2 Self Service Registration

You can register yourself or your orgnization 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 you will be guided through a series of steps to submit your company and user information. Once this information is submitted, Oracle Partner Management generates a user account for you. You will be given a username and password to log into the partner dashboard. The partner receives an e-mail notification with username, password and organization identifier number. A partner registered here is always registered as a partner administrator.

A channel team will be assigned to you based on the territory setup. The channel team is a set of channel manger(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.

You 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 and so on.
6. Enter personal details such as name, address, username and password and so on.
7. Select one or more Partner Types that become part of the profile.

   If you are a subsidiary partner, enter the identification information of your global partner.

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

3.3 Partner Member Types

The member types available to you are:

- Global - You can register as a global partner. This allows you to share your partner number with your subsidiaries.
- Subsidiary - You can register as a subsidiary partner. Subsidiary partners can enroll in a program by providing the identifier information of their global partner.
- Standard - You can register as a standard partner.

If you have a global presence, you can register as a global partner and thus have a global membership. Once you are established as a global partner, subsidiary partners can enroll into programs under your global membership.

Notifications

The system will send out notifications when:

- A global partner is created or
- You apply for a subsidiary membership into a program or
- A subsidiary partner has been accepted into a program or
- Your enrollment has been rejected by a vendor or a subsidiary partner's membership has been terminated by a global partner.

3.4 Users and Security

Access to data is restricted by the user type.

User Types

Partner Users - They are employees in the partner organization who can request for accounts via self-service and these requests are routed to partner administrators for approval. They can manage their profile, preferences, view a company's profile, manage objects that they have access to and can also purchase things from the store.

4

Maintaining Partner Information

This chapter explains how you can maintain your personal information and your company information. Sections in this chapter include:

- Section 4.1, "Overview"
- Section 4.2, "My Profile"
- Section 4.3, "Company Profile"
- Section 4.4, "Administration"
- Section 4.5, "Users and Security"

4.1 Overview

You can maintain your personal and company profile by navigating to the 'My Profile' global icon. The partner administrator can maintain the company profile and preferences.

4.2 My Profile

The Profile icon is displayed to all users. Partner users can access their own profile and preferences and partner administrators can access their own profiles, preferences as well as the organization and administration section for maintaining their company profile and managing other users.

Access to this page is granted through the use of permissions and roles:

Oracle Partner Management has seeded two roles:

- Partner administrator who can access the user profiles, preferences, and manage the company profile and the administration section.
- Partner users who can access the user profile, preferences and view their company profile.

In the My Profile page, you can update your personal details such as first name, last name, email address, username and password. You can also view your profile attributes in this page.

Use this procedure to update your personal information and view your profile attributes.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Profile icon > My Profile tab.
2. Click the Personal Information side navigation link.

   The Personal Information page appears.

   1. In the Details tab, you can make changes such as name, email address, user name and password. Click **Apply** to save your changes.
   2. In the Profiles tab, you can view profile attributes.

3. Click the Contact Information side navigation link and in the Address Book tab, click **Create Address** to create an address. You can specify if an address is a shipping address or a billing address by selecting a value from the Address Type drop-down list. Click **Apply** to save your changes.

    1. In the Email Addresses tab, click **Create Email Address** to create an email address. Enter necessary details and click **Apply** to save your changes.

    2. In the Phone Book tab, click **Create Phone Number** to create a phone number. Enter necessary details and click **Apply** to save your changes.

4. Click the Preferences side navigation link to view and update your profile information. The profiles are listed one after the other and separated by commas. For example: Product Expertise: Unix Servers, Storage Area Networks.

    1. In the General tab, set preferences such as the date format and email delivery language. Select the Marketing check box if you want to receive e-mails about special offers and products. Click **Apply** to save your changes.

    2. In the Sales tab, update the general and opportunity attributes. Click **Apply** to save your changes.

4.3 Company Profile

In the Company Profile page, you can update the company profile.

Use this procedure to update the company information.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Profile icon > Company Profile tab.

2. Click the Company Information side navigation link.

    The Organization Information page appears.

    1. In the Detail tab, you can make changes such as organization name, Registry ID, annual revenue, year established, total employees, and a URL address. Click **Apply** to save your changes.

    2. In the Profiles tab, you can update the sales and general profile attributes.

3. Click the Contact Information side navigation link and in the Address Book tab, click **Create Address** to create an address. You can specify if an address is a shipping address or a billing address by selecting a value from the Address Type drop-down list. Click **Apply** to save your changes.
   1. In the Email Addresses tab, click **CreateEmail Address** to create an email address. Enter necessary details and click **Apply** to save your changes.
   2. In the Phone Book tab, click **Create Phone Number** to create a phone number. Enter necessary details and click **Apply** to save your changes.
   3. In the Telex tab, click **Create Telex Number** to create a telex number. Enter necessary details and click **Apply** to save your changes.
4. Click the Administrators side navigation link to view the names of administrators and their email addresses.
5. Click the Channel Team side navigation link to view the channel team and their details.
6. Click the Memberships side navigation link to view current memberships of the organization. The partner administrator can view their memberships, including contracts and the status of the memberships and start the renew and upgrade process from this page as well. To start the renewal or upgrade process, select the program and click **Renew** or **Upgrade** to navigate to the enrollment questionnaire.

4.4 Administration

Only partner administrators can access the Administration tab. They can create and manage users and assign them roles. They can also create new roles and assign permissions to this role. For example, the partner administrator can create a new role that will enable a user to accept compensation on a referral or they can create a role to enable only people in the claims department to submit a claim.

Use this procedure to create users and contacts.

Prerequisites

None.

Steps

1. Log in as the partner administrator and navigate to Profile icon > Administration tab.

2. Click the Contact Management side navigation link and click **Create Contact** to create a contact and register the contact as a user. Click **Apply** to save your changes.
3. Click the Pending Approvals side navigation link to review approvals that are pending and approve or reject them.
4. Click the Role Management side navigation link to create roles and assign permissions to the role. A partner administrator from the Oracle iStore application can give permission to users.

4.5 Users and Security

Access to partner data is restricted by user types.

User Types

- Partner Users - They are employees in the partner organization who can request for accounts via self-service and these requests are routed to partner administrators for approval. They can manage their profile, preferences, view a company’s profile, manage objects that they have access to and can also purchase things from the store.
- Partner Administrators - They are the primary contact of the organization and register the company. They manage the company profile, create other user accounts for their organization and assign roles to users.

5

Enrolling into Programs

This chapter explains how you can enroll into programs, and upgrade and renew your memberships into programs. Sections in this chapter include:

5.1 Enrollment Process

Oracle Partner Management enables you 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 your relationship with the vendor.

You can enroll into a program through the Available Programs bin or you can enroll into programs that are initiated by a distributor. Distributor initiated programs mean that a distributor has invited you to enroll into a partner program.

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

If you select 'I Agree':

- the contract is created between you and the vendor
- the contract is created with the binding party name and the title that you entered

If you select 'I Do Not Agree':

- the contract will not be created between you and the vendor
- you will be asked whether you want to continue
  - If you select 'Yes', the enrollment process is aborted and you will return to the partner dashboard. The data for the enrollment form is saved.
  - If you select 'No', you will be navigated back to the active window and asked again to 'Accept' the legal terms.

If you select 'Print and Fax/Mail':

- the contract is created in the 'Entered' status between you and the vendor
- the contract is created without the binding party name, title, and date

5.2 Enrolling via the Available Programs Bin

This bin displays new programs and programs that have incomplete enrollments. The bin is displayed only to the partner administrator.

You can review information you entered and submit your enrollment request. During the enrollment process, you can view the program fees (inclusive of taxes), if it is required for program memberships. The application displays calculated taxes based on your billing address.

Use this procedure to enroll into a program.

Prerequisites

None.

Steps

1. Log in as a partner administrator and navigate to Available Programs Bin > Partner Program Details - Program Overview page.
2. Click **Enroll Now**.

   The Enrollment Questionnaire page appears.

   The system retrieves relevant company, user, and current partner profile information. The system prompts user qualification questions relevant to the program selected for enrollment and pre-populates particular fields that currently has answers.
3. Enter necessary details and click **Next**.

   The Questionnaire Summary page appears.
4. You can also edit the enrollment form by clicking **Edit Enrollment Form**.

   The Contracts page appears.
5. Accept the contract and click **Next** to enter a billing address.

   This is the address where you would like to receive your bills.
6. Click **Next** to enter a payment method in the Payment Information page.

   The Program Fees window appears. You can view the program fees and choose to pay by credit card, check, purchase order, or, cash.

   Based on the type of payment methods defined by country, the appropriate payment methods will be presented to you depending on your country of origin. (Pro Forma Invoice is a configurable option)

   The printable Program Fees window includes: Partner Information, Order Number, Fees, Description of Fees, Local Taxes, Remit to Address (selected by relating to partner's country of origin). You can enter or update appropriate payment information. (Note: Payments are optional)

7. Click **Next** to review the billing and payment information.

   The system presents a summary of the enrollment form for review.

8. Review and submit your enrollment.

5.3 Enrolling into Distributor Initiated Programs

Besides enrolling into programs from the partner dashboard, you can also enroll into programs when a distributor invites you to enroll into programs. Distributors can invite you to join programs depending on program setups. If you are managed by a distributor, programs that they have invited you to join, will appear in your bin on the dashboard.

5.4 Renewing Memberships into Programs

This bin appears on the dashboard when a program is up for renewal (default is 60 days before a membership expires). This bin displays programs for which the expiration date is approaching (within the grace period) or has already expired. A program appears in this bin when the first renewal notification (regarding membership expiration) is sent to you. The program name is hyperlinked to the Program Summary page. You can initiate the enrollment process from this page.

This bin is available only to the partner administrators to assist them manage their memberships.

Use this procedure to renew your enrollment into a program.

Prerequisites

You are enrolled in one of the programs and your membership is close to expiration. The system sends you a notification of the expiration. The notification includes a link to the application.

Steps

1. Log in as a partner administrator and navigate to Renew Programs Bin > Partner Program Details - Program Overview page.

2. Click **Renew**.

A list of other enrollments that are up for renewal within the given time frame appear. You can enroll into the programs one at a time, or all at once.

3. Select to renew all at once. You will be presented with questionnaires in order of expiration. You can complete questionnaires, enter contract information, enter payment information and submit. The system routes the enrollment forms to appropriate vendors for approval.

5.5 Upgrading Program Memberships

You can upgrade your membership from one program to another. The Upgrade Programs bin displays programs that are available to upgrade to. This bin is available only to partner administrators to assist them in managing their program memberships.

Use this procedure to upgrade your program memberships.

Prerequisites

None.

Steps

1. Log in as a partner administrator and click the Upgrade Membership Bin > Partner Program Details - Program Overview page.
2. Click **Upgrade**.

   The Enrollment Questionnaire page appears.
3. Enter necessary details and click **Next**.

   The Questionnaire Summary page appears. At this stage you can also edit the enrollment form by clicking **Edit Enrollment Form**.

   The Contracts page appears.
4. Accept the contract and click **Next** to enter a billing address.

   This is the address where you would like to receive your bills.
5. Click **Next** to enter a payment method in the Payment Information page.

   You can view the fees of a program and choose to pay by credit card, check, purchase order, or cash.
6. Click **Next** to review the billing and payment information and submit the enrollment application.

5.6 Users and Security

Access to enrollments is controlled based on user types.

- Partner Users - They are employees in the partner organization who can view and update enrollment requests that they created.
- Partner Administrators - They maintain program memberships which includes renewals and upgrades.
- Vendor Approvers - They are employees in the vendor organization who can approve enrollment requests. After they have performed the approval, they continue to have access to the enrollment request.

6 Opportunity Management

This chapter details business flows and procedures on how you can accept, decline and work on opportunities. Sections in this chapter include:

6.1 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.

Sales channels can be direct or indirect.

- Sales representatives from a vendor's organization fulfill direct opportunities.
- Indirect opportunities are routed to you for fulfillment.

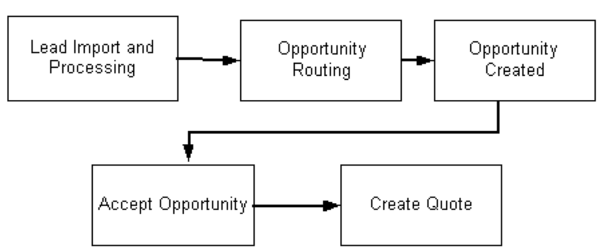
When you are assigned an opportunity, you can view details and accept it. After you have accepted the opportunity, you can view it completely and actively work on closing the business. You can create a quote and place an order. At any time, you can also abandon the opportunity.

6.2 Business Flow

Figure 6–1 illustrates the Lead to Opportunity to Quote flow. Each box in the illustration is explained below:

- Section 6.2.1, "Lead Import and Processing"
- Section 6.2.2, "Opportunity Routing"
- Section 6.2.3, "Opportunity Offered"
- Section 6.2.4, "Accept Opportunity"
- Section 6.2.5, "Create Quote"

Figure 6–1 Lead to Opportunity to Quote Flow



6.2.1 Lead Import and Processing

A sales opportunity is also referred to as a potential sale. Vendors can create an indirect opportunity or import leads and convert them to opportunities.

6.2.2 Opportunity Routing

When vendors create an opportunity, they can match it to the most appropriate partner. They search for partner(s) manually or use the partner matching engine. While routing the opportunity to partners, vendors can decide how many partners they want to submit it to: one partner, multiple partners in a serial manner, or multiple partners in parallel.

The routing types are:

- **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 vendors 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.
- **Multiple Parallel:** Vendors can broadcast the opportunity to multiple partners for review at the same time. However, only the partner who accepts it first, wins the opportunity.
- **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.

6.2.3 Opportunity Offered

When the opportunity is offered to you, you receive a notification to review and accept the opportunity. You can have a specified time limit and if you do not accept or decline it within the specified time frame, the opportunity is withdrawn. It can then be offered to another partner. Mail alerts are triggered to inform you and the vendors that the opportunity has been withdrawn.

6.2.4 Accept Opportunity

After you accept an opportunity, you can access the record and add more users to the team for that opportunity. All designated contacts in your company are given access to details, and if you are given full access, you can update the details. Additional sales people from your organization can be given access by adding them to the sales team. Your sales team can work on the opportunity, updating details when required and work on it till the status of the opportunity is 'Won' or 'Lost'. At the end of the process the opportunity is closed and e-mail alerts are sent again to inform the relevant parties.

If you decline the opportunity, you lose access to the record and the channel manager is notified.

6.2.5 Create Quote

After you accept an opportunity, you can create a quote or a proposal for the customer and publish it to the customer. You can add products to the quote and select the price list for the quote. You can now submit the quote for approval to the vendor. Once the vendor, the customer, and you agree on the quote, you can place an order from the quote.

6.3 Accepting or Declining an Opportunity

Use this procedure to accept or decline an opportunity.

Prerequisites

Vendor or distributor must have offered an opportunity to you.

Steps

1. Log in as a partner user and navigate to Opportunities Quick Link > Opportunity Summary page.

   The Opportunity Details page appears. You can view details of the opportunity that provide enough information to make a decision on accepting the opportunity.

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

   The page refreshes and becomes updatable if the offered opportunity is accepted. Another option is to decline the opportunity.

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

6.4 Abandoning an Opportunity

After you have accepted an opportunity, you can decide to abandon it.

Use this procedure to abandon an opportunity.

Prerequisites

Vendor or distributor must have offered an opportunity to you.

Steps

1. Log in as a partner user and navigate to Opportunities Quick Link > Opportunity Summary page > Opportunity hyperlink > Partner cue card.

   The Opportunity Details page appears. You can view details of the opportunity and decide that you do not want to pursue the opportunity any longer.

2. Click **Abandon** to abandon the opportunity.

   You lose visibility into the opportunity and the channel manager is notified. The channel manager can decide to close the opportunity or route the opportunity to another partner.

6.5 Creating Quotes and Placing Orders

Once you accept the opportunity to work on, you can create a quote or a proposal for the customer and publish it to the customer. You can add products to the quote, select a price list for the quote and submit the quote for approval to the vendor.

Prerequisites

Vendor must have offered an opportunity to you.

Steps

1. Log in as a partner user and navigate to My Opportunities Quick Link bin > Opportunity hyperlink > Opportunity Summary page.

   The Opportunity Details page appears. You can view details of the opportunity that provide enough information to make a decision on accepting the opportunity.

2. Click **Create Quote**.

   A quote is created with the customer information filled in.

3. Click **Apply**.

   If the opportunity had products defined, the products are carried over to the quote and priced using the price list defaulted when creating the quote.

4. Click the Approval side navigation link and click **Apply**.

   The status of the quote changes to 'Approved' if approvers are not defined. If approvers are defined, it goes to the approvers and the status changes to 'Approved' after they approve.

5. Select **Create Order** form the drop-down list and click **Go**.

   An order is created. You can view the details of the order by clicking on the order number.

6.6 Users and Security

Access to opportunities are restricted by user types and permissions.

User Types

- Partner Users - They are employees in the partner organization who can view and accept opportunities.
- Partner Administrators - They are employees in the partner organization who can view and accept all opportunities owned by their organization.

Permissions

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

7

Referral Management

This chapter details business flows and procedures for Referral Management, including submitting referrals, accepting compensation and searching for requests. Sections in this chapter include:

7.1 Overview

Referral Management enables you to refer business opportunities, that you cannot fulfill directly, to the vendor's organization. For example, the customer is interested in a product that you do not sell. You can submit a referral to the vendor and receive a percentage of the revenue.

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

You can receive notifications about the referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by the vendor and sent when the status changes, for example, when one of your referrals is approved.

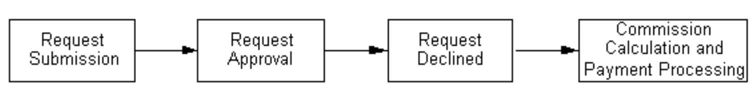
You can access a summary list of referrals that you have access to. You can build personal views to quickly find referrals that you are most interested in.

7.2 Business Flow

Figure 7–1 illustrates the Referral to Partner Compensation flow. Each box in the illustration is explained below:

- Section 7.2.1, "Request Submission"
- Section 7.2.2, "Request Approval"
- Section 7.2.3, "Request Declined"
- Section 7.2.4, "Commission Calculation and Payment Processing"

Figure 7–1 Referral to Partner Compensation Flow



7.2.1 Request Submission

If you have a lead or an opportunity that you cannot fulfill directly, you can refer it to a vendor and the vendor can further assign sales representatives to the opportunity.

7.2.2 Request Approval

When you submit a referral, a workflow process sends a notification to the designated approver(s).

Approvers review referrals and check for duplicate referrals and accept or decline a referral. If a duplicate exists, the approver links it with the referral submitted by you. If a duplicate does not exist, the user approves the referral after checking the quality of the data entered in the referral form.

7.2.3 Request Declined

If the referral is declined, you receive a notification accordingly. Depending on the setup, the approver is notified too.

7.2.4 Commission Calculation and Payment Processing

Once your referral is approved, it becomes a lead. If the referral generates revenues for the vendor, you are compensated based on the referral agreement. You can review compensation details and accept it or ask for assistance. The compensation rates can vary from initiative-to-initiative and depends on the product category. The referral is closed automatically by the system after you receive your compensation.

7.3 Searching for a Referral

You can search for referrals by performing advanced searches based on referral criteria. You can customize the criteria by adding or removing search attributes to tailor your search. You can save your search criteria and also use it as the default search page.

While searching for a referral, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Use this procedure to search for a referral.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Referrals Quick Link > Referrals page.

   If you want to export records in the referral summary table in the CSV (comma separated values) format, click **Export**. You can personalize your view to display relevant records, desired columns and sorting. Once your result table is displayed, click **Export** to export the records using .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Personalize**.

   The Personal Referrals Views page appears.

3. Click **Create View** to create a search view.

   To update or copy an existing view, click **Update** or **Duplicate**.

4. In the General Properties region, enter details about the request that you would base your search upon.
5. Click **Rename Columns/Totaling** to rename columns displayed in the table. Select the check box in the "Show Total" column as applicable, if you would like a total to display.
6. In the Column Properties region,
   - Select columns that should be displayed after performing a search
   - Sort the order in which they should appear.
7. In the Search Query to Filter Data in your Table region, specify parameters and values to be displayed.
8. Click **Apply** to apply your changes.

7.4 Submitting a Referral

Use this procedure to submit a referral.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Referrals Quick Link > Referrals page.
2. Select a referral initiative from the Create drop-down list and click **Go**.
3. In the Create Referral page, enter a referral name.

   The Partner field is populated with the name of the partner's organization.
4. In the Contact field, select a partner contact from the contact LOV.

   The LOV displays partner contacts with a valid partner user account. The contact specified receives notifications about the referral.
5. Enter details in the Customer and Contact Information region.
   - Enter an organization name, select a country from the drop-down list and click **Go**. The list of countries available in the drop-down list is dependent on the referral initiative you selected. If a country is not listed, click **Cancel** to navigate back to the Referrals page and select the appropriate initiative. The address fields change to reflect the address format valid for the country selected. Enter the address information.
   - Select a title from the Title drop-down list and enter the first name, last name, e-mail address and phone number. The phone number must be formatted with country code- area code- phone number.
6. Enter details in the Additional Details region.
7. Enter product categories for the referral in the Products region.

   The list of products available is dependent on the referral initiative you selected. The referred products' total amount should be greater than or equal to the threshold amount specified in the referral initiative for the matching geographic region.
8. Select a currency for the referral.

   This becomes the currency displayed on the lead or opportunity record once the referral is approved.
9. Enter notes in the Notes region by selecting a note type from the Note Type drop-down list.

   You can use notes to store any extra information while you are creating the referral. This is used to maintain information or comments about the referral and the note automatically becomes a public note.
10. To save without submitting click **Apply**.

11. To save and submit for approval click **Submit**.

7.5 Accepting Compensation

Use this procedure to accept compensation for a referral.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Partner Dashboard > Referral Quick Link.
2. Select a referral that is in the 'Awaiting Partner Acceptance' status.
3. Click '**Assistance Request**' if you do not want to accept compensation. Enter notes to further discuss the compensation with the vendor.

   The person assigned to the claim is notified and can update the claim and contact you.
4. Click '**Accept Compensation**', to accept the compensation.

7.6 Referral Notifications

You receive a notification after you submit a referral for review. You are also notified when the referral is approved or declined. Finally, you receive a notification when you need to review and accept the proposed compensation.

7.7 Referral Statuses

You can view the status of your referrals and enter notes for a referral. Besides entering notes, you cannot update a referral. You receive notifications that notify the status of the referral at various stages.

Table 7–1 provides information on different statuses.

Table 7–1 Referral Statuses

Status	Description
APPROVED	Approved

Table 7–1 Referral Statuses

Status	Description
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_FEE_PAID	Closed. Fee Paid
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
COMP_AWAIT_PRT_ACCEPT	Awaiting For Partner Acceptance
COMP_CANCELLED	Compensation Cancelled
COMP_INITIATED	Processing Compensation
COMP_BEING_NEGOTIATED	Negotiating Compensation
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor
MANUAL_EXTEND	Extended by Vendor
PAYMENT_BEING_PROCESSED	Payment Being Processed
SUBMITTED_FOR_APPROVAL	Pending Approval

7.8 Users and Security

Access to referrals are restricted by roles and user types.

Permissions

- Super User Permission - [PV_REFERRAL_SUPERUSER] - Allows a partner user to view and update all referrals owned by their organization.
- Compensation Approver - [PV_REF_COMP_APPROVER] - Enables partners to view and accept compensation for referrals.

  Note that 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.

User Types

- Partner Users - They are employees in the partner organization who can view and update referrals they have created and referrals where they are identified as the Partner Contact.

- Partner Administrators - They are employees in the partner organization who can view and update all referrals owned by their organization.

8 Deal Registration

This chapter details business flows and procedures for Deal Registration, including registering deals and searching for deal registrations. Sections in this chapter include:

8.1 Overview

When you resell the vendor products, there can be a conflict with the vendor's direct sales force on specific opportunities. Deal Registration enables you to submit opportunities and receive the vendor's commitment not to compete directly and support you on the deal.

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

You can 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 one of your deal registrations is approved.

You can access a summary list of deal registrations that you have access to. You can build personal views to quickly find deal registrations that you are most interested in.

8.2 Business Flow

Figure 8–1 illustrates the Deal Registration to Opportunity flow. Each box in the illustration is explained below:

- Section 8.2.1, "Request Submission"
- Section 8.2.2, "Request Approval"
- Section 8.2.3, "Opportunity Created"

Figure 8–1 Deal Registration to Opportunity Flow

8.2.1 Request Submission

When you have a business deal and want to fulfill it directly, you can register the deal with the vendor to avoid competition from their direct sales force.

8.2.2 Request Approval

When you submit a deal, the system identifies the approvers based on the deal details and notifies them. The deal has to be reviewed and approved or declined by the appropriate person.

If a duplicate deal exists, the approver selects the deal and links it with the deal submitted by you. If a duplicate deal does not exist, the approver approves the deal after viewing the details.

After the approval, the customer and contact of the deal is checked against existing customers and contacts in the system.

If the reviewer finds that the data is not good enough or there is already a duplicate, the reviewer can decline the deal and enter a comment. You receive a notification accordingly.

8.2.3 Opportunity Created

When the deal registration is approved, a new opportunity is created in the system and assigned to your partner organization for fulfillment. You are notified about the approval and when you fulfill the opportunity, the opportunity is closed. If you do not accept or decline the opportunity in the specified time, the vendor can re-evaluate the deal and can allot you some more time to accept or decline the opportunity.

8.3 Searching for a Deal Registration

You can search for deal registrations by performing advanced searches based on deal registration attributes. You can customize the criteria by adding or removing search attributes to tailor your search. You can save your search criteria and also use it as the default search page.

While searching for a deal registration, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Use this procedure to search for a deal registration.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Deal Registrations Quick Link > Deal Registrations page.

   If you want to export records in the deal summary table in the CSV (comma separated values) format, click **Export**. You can personalize your view to display relevant records, desired columns and sorting. Once your result table is displayed, click **Export** to export the records using .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Personalize**.

   The Personal Deals Views page appears.

3. Click **Create View** to create a search view.

   To update or copy an existing view, click **Update** or **Duplicate**.

4. In the General Properties region, enter details about the request that you would base your search upon.

5. Click **Rename Columns/Totaling** to rename columns displayed in the table. Select the check box in the "Show Total" column as applicable, if you would like a total to display.

6. In the Column Properties region,

   - Select columns that should be displayed after performing a search
   - Sort the order in which they should appear.

7. In the Search Query to Filter Data in your Table region, specify parameters and values to be displayed.

8. Click **Apply** to apply your changes.

8.4 Registering a Deal

Use this procedure to register a deal.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Deal Registrations Quick Link > Deal Registration page.

2. Select a deal initiative from the Create drop-down list and click **Go**.
3. In the Create Deal Registration page, enter a name for the deal that you want to register.

   The Partner field is populated with the name of the partner's organization.
4. In the Contact field, select a partner contact from the contact LOV.

   The LOV displays partner contacts with a valid partner user account. The contact specified receives notifications about the deal.
5. Enter details in the Customer and Contact Information region.
   - Enter an organization name, select a country from the drop-down list and click **Go**. The list of countries available in the drop-down list is dependent on the deal initiative you selected. If a country is not listed, click **Cancel** to navigate back to the Deal Registration page and select the appropriate initiative. The address fields change to reflect the address format valid for the country selected. Enter the address information.
   - Select a title from the Title LOV and enter the first name, last name, e-mail address and phone number. The phone number must be formatted with country code- area code- phone number.
6. Enter details in the Additional Details region.
7. Enter product categories for the registration in the Products region.

   The referred products' total amount should be greater than or equal to the threshold amount specified in the initiative, for the matching geographic region. You may get a warning if you enter a total value lower than the threshold decided by the vendor.
8. Select a currency for the deal registration.

   This becomes the currency displayed on the opportunity record once the registration is approved. If you enter other currency fields for this deal registration, the currency values are converted in the base currency you select under the Product section.
9. Enter notes in the Notes region by selecting a note type from the Note Type drop-down list.

   You can use notes to store any extra information while you are registering the deal. This is used to maintain information or comments about the deal and the note automatically becomes a public note.
10. Save your changes.

8.5 Deal Registration Notifications

You receive a notification after you submit a deal registration for review. You are also notified when the deal registration is approved or declined.

8.6 Deal Registration Statuses

You can view the status of your deals and enter notes for a deal registration. After submitting the deal registration, you can only update the partner contact name and add notes to the deal registration. You receive notifications at various stages of the deal registration to allow you to track the status of the deal registration.

Table 8–1 provides information on different statuses.

Table 8–1 Deal Registration Statuses

Status	Description
APPROVED	Deal is approved
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
CLOSED_OPPTY_WON	Closed. Opportunity Won
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor
MANUAL_EXTEND	Extended by Vendor
SUBMITTED_FOR_APPROVAL	Pending Approval

8.7 Users and Security

Access to deal registrations are restricted by roles and permissions.

Permissions

- Super User Permission - [PV_DEAL_SUPERUSER] - Partners with this permission can view and update all deal registrations for their organization.

  Note that users that have access to all opportunities, will also access all the deal registrations that have been converted into opportunities.

User Types

- Partner Users - They are employees in the partner organization who can view and update deal registrations they have created and deal registrations where they are identified as the Partner Contact.
- Partner Administrators - They are employees in the partner organization who can view and update all deal registrations owned by their organization.

9 Special Pricing Management

This chapter details business flows and procedures for Special Pricing Management, including submitting requests, submitting claims to collect the discount amount, and searching for requests. Sections in this chapter include:

- Section 9.1, "Overview"
- Section 9.2, "Business Flow"
- Section 9.3, "Searching for a Special Pricing Request"
- Section 9.4, "Submitting a Special Pricing Request"
- Section 9.5, "Submitting a Claim"
- Section 9.6, "Special Pricing Request Statuses"
- Section 9.7, "Claim Statuses"
- Section 9.8, "Users and Security"

9.1 Overview

Special Pricing Management enables you to submit and check the status of special pricing requests and claims online. A special pricing request enables you to request discounted pricing from the vendor. You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

When you submit 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. After your special pricing request has been approved, and you have closed the sale, you can submit a claim to receive the discount that was approved. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the discount amount.

You will receive notifications about the special pricing request activity. Notifications are configured by the vendor and sent when the status changes, for example, when one of your special pricing requests is approved.

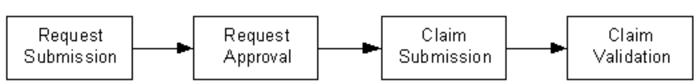
You can access a summary list of all the special pricing requests that you have access to. You can build personal views to quickly find the special pricing requests that you are most interested in.

9.2 Business Flow

Figure 9–1 illustrates the Special Pricing Request to Partner Claim flow. Each box in the illustration is explained below:

- Section 9.2.1, "Request Submission"
- Section 9.2.2, "Request Approval"
- Section 9.2.3, "Claim Submission"
- Section 9.2.4, "Claim Validation"

Figure 9–1 Special Pricing Request to Partner Claim Flow



9.2.1 Request Submission

You can submit a request by logging into the partner dashboard.

You can request for special pricing in two scenarios.

- Existing inventory - When you have already bought the product and want a discount for past purchases. When you request for a special price and the vendor approves it, you can proceed to make the sale to the end-customer and claim the discounted amount by providing the proof of sale to the vendor.
- New inventory - When you request a special price for a new purchase and the vendor approves it, you can close the sale to the end-customer at a discounted rate. When you book the order with the vendor, you can include the offer authorization information from the approved special pricing request. If the vendor approved the request as an off-invoice discount, you will immediately receive the discount. If the vendor approved the request as an accrual discount, you will receive the discount by submitting a claim. After you complete the sale, you can provide proof of your sale to the vendor and claim the discounted amount. The amount can either be accrued or given off the invoice, as determined by the vendor's organization.

You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

Table 9–1 describes the different request types and different set of data that the system captures depending on each request type.

Table 9–1 Request Types

Request Type	Description	Differences in Data Captured
Meet Competitor Price	Used when you want to match a competitor's price. You can ask the vendor to reduce the price to complete a sale.	Both end-customer and reseller information is captured.
Bid Request	Used to request discounted pricing on a particular end-customer deal.	Only end-customer information is captured.
Blanket Request	Used when you have inventory in your warehouse and have not been able to move it. You can ask for a discount to move the unsold inventory.	Neither end-customer nor reseller information is captured since the request is not for a specific end-customer deal.

9.2.2 Request Approval

When you submit a request, the appropriate vendor approver will be notified. Notifications can be configured to be sent to you as soon as the request is either returned, approved or declined. When the approver is notified of a request, they review the request and either approve it or decline it.

Offers

Offers are generated in the background when a special pricing request is approved, to track the approved special pricing discounts.

If you submitted a special pricing request for new inventory, the vendor will have the option to select the Offer Type with which they want to approve the special pricing requests.

There are three types of offers:

- Accrual Offer
- Off-Invoice Offer
- Scan Data Offer

Accrual Offer

If the special pricing request is being fulfilled from new inventory, the discounted amount can be accrued and you will be paid later. If the vendor specifies an Accrual Offer type, you have to submit a claim.

Off-Invoice Offer

If the special pricing request is being fulfilled from new inventory, the discounted amount can be paid to you off the invoice. If the vendor specifies an Off-Invoice Offer type, you do not have to submit a claim.

When you make a sale from new inventory, a unique offer number will be generated and displayed on the approved special pricing request. When requests are approved with off-invoice offers or accrual offers, this offer number can be used while placing orders.

Scan Data Offer

If the special pricing request is being fulfilled from existing inventory, the system will generate a Scan Data offer.

When you make a sale from existing inventory, the offer number is the same as the agreement number displayed in the user interface. If a scan data offer type is used, you have to submit a claim.

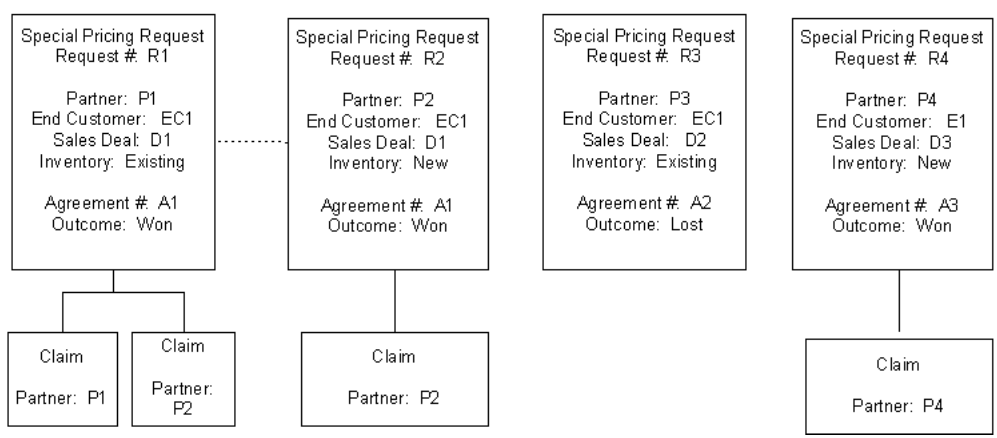
Relationships between Special Pricing Requests and Claims

To collect payment on the approved special pricing discount, you can submit a claim.

The diagram below explains a scenario of submitting a request and the outcome of submitting a request.

A partner P1 submits a special pricing request R1 to close a sales deal for a specific end-customer EC1. When the request is approved, the partner makes the sale from the existing inventory and the outcome of the sale is 'Won'. After the request is approved, the Agreement number A1 will be generated and it appears in the user interface. You can submit multiple claims for a request. During approval, if requests are linked, the same Agreement number A1 will be used for requests that are linked to each other.

Figure 9–2 Relationship Between Special Pricing Requests and Claims



You can only view requests and claims for your organization.

Declined Requests

A vendor approver can decline a request. When doing so they can add a reason and comment that you will see as a Note in the request. A vendor might decline a request because information was missing. In this case you can add the missing information as a note or an attachment and resubmit the request. It will continue through the standard approval process.

9.2.3 Claim Submission

When a request is approved, the vendor has committed to the discounted price for the products, quantity and time frame listed on the request. After you complete a sale at the discounted price, you can submit a claim to collect your payment. The claim gets linked to the request.

You can submit claims manually, or you can submit Point of Sales (POS) data to the vendor in order for them to upload into the system and automatically generate special pricing claims. You can track the status of a claim by logging on to the partner dashboard to check the claim status.

You can submit claims from dashboard electronically as Point of Sale (POS) data. POS data can either be submitted in EDI supported standards as xml files or as an excel sheet that vendors can upload. Vendor can determine what needs to be sent as POS data. POS data can contain Claim Number, Claim Amount, Agreement Numbers, Order Numbers, End Customer, Product and Pricing Information. Claim requests sent as POS data gets linked back to the special pricing request after a claim is generated.

You can send POS data to the vendor on a periodic basis. They can use the information in the POS data feed to validate the sale and automatically create a claim and generate payment.

For information on submitting special pricing claims information within a POS file , see the *Oracle Partner Management Vendor User Guide*.

9.2.4 Claim Validation

When you submit a claim, the status of the claim is 'Open'. If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. After the approver approves the claim, the system initiates payment.

9.3 Searching for a Special Pricing Request

You can search for special pricing requests to view request details or submit a claim.

You can perform advanced searches based on request attributes. You can customize the search criteria by adding or removing search attributes. You can choose attributes on which you want to base your search. You can save your search criteria and use it as the default view of special pricing requests.

While creating a personalized view to search for requests, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns to be displayed in the search results.

Use this procedure to create a personalized view to search for a special pricing request.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Special Pricing Requests Quick Link > Special Pricing Request page.
2. Enter details in the Simple Search region and click **Go**.

   The queried records are displayed.
3. Click **Save Search Criteria** to personalize your search and save it.

   The Create View page appears.
4. In the General Properties region, enter details about the request that you would base your search upon.
5. Click **Rename Columns/Totaling** to rename columns displayed in the table.
6. In the Column Properties region, select columns that should be displayed after performing a search and sort the order in which they should appear.
7. In the Search Query to Filter Data in your Table region, specify parameters and values to be displayed.
8. Click **Apply** to apply your changes.
9. Click **Apply and View Results** to apply and view your changes.

9.4 Submitting a Special Pricing Request

Use this procedure to submit a special pricing request.

Prerequisites

None.

Steps

1. Log in as the partner user and navigate to Special Pricing Requests Quick Link > Special Pricing Requests page.

   To export data, click **Export**. Data will be exported in the CSV (comma separated values) format. You can personalize your view to display relevant records, desired columns and the sorting order. Once your result table is displayed, click **Export** to export records using the .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Create**.

   In the Create Special Pricing Request page, your name is populated in the Distributor field. The Requestor's Name, Requestor's Phone and Requestor's E-mail are also populated and you change these values.

3. Select a value from the Request Type drop-down list. The Request Types are:

   - Meet Competitor Price - Use this to request discounted pricing to match a competitor's price.
   - Bid Request - Use this to request discounted pricing on a particular end-customer deal.
   - Blanket Request - Use this to request discounted pricing when you have not been able to move inventory from your warehouse.

4. Select the Ship from Stock check box if you are going to fulfill the special pricing deal with products from your existing inventory.

   If you are going to order new products to fulfill the special pricing deal, do not select this check box.

5. In the Outcome field, you can regularly update the outcome of the special pricing request to track whether the request has been won, lost or is still in progress.

   This field indicates the status of the sales deal.

6. Click **Continue** to proceed.

7. Enter details in the Reseller Details region and End Customer Details region.

   - If it is a Meet Competitor Price request, enter the end customer and reseller information.

- If it is a Bid Request, enter the end customer information.

8. In the Products region, enter details about the product(s) for which you want a discount.
9. Select a product from the LOV, specify the quantity, unit of measure, the regular price of the product, discount amount, and the discount type. The discount types are:
   - Discount Percentage: You can specify the discount percentage.
   - Discount Amount: You can specify a discount amount.
   - New Price: You can specify a new price that you are looking for, after discount.
10. Optionally, you can enter details in the Attachments region, Notes region and submit your request.

    The Preview Submission page appears.
11. Click **Apply** to submit your request.

9.5 Submitting a Claim

You can submit claims manually or in bulk. After you have submitted the claim, the claims administrator can view the claim and resolve the claim.

Use this procedure to submit a claim manually.

Prerequisites

A special pricing request must be in the 'Approved' status for the Submit Claim button to be enabled.

Steps

1. Log in as a partner user and navigate to Special Pricing Request Quick Link > Special Pricing Requests page.
2. Select a request for which you want to submit a claim and click **Submit Claim**.

   In the case of a new inventory request that is using an off-invoice offer, the Submit Claim button is disabled since the discount has been taken directly from the invoice.

   In the Create Claim page, the Special Pricing Request Summary region displays a summary of the request. You can view the total amount approved, amount that has been claimed, amount that has been paid out, and the outstanding amount. From the claim, you can link directly to the associated request. You can also view a summary list of all claims submitted for that request and link through to them.

3. By default, the Pay to field is automatically populated with the name of the organization who is submitting the claim.

   The Claim Type field displays the default claim type for Special Pricing.

4. Select a value from the Payment Method LOV.

   The payment methods are credit memo or check. The Products region displays product details.

5. Enter other necessary details and enter values in the Sale Date, Quantity Sold and Claim Amount fields.

6. Click **Recalculate** to calculate the claim amount automatically based on the discount amount and quantity entered.

7. Optionally, you can enter details in the Attachments and Notes region and submit your claim.

8. To save a draft without submitting click **Save**.

9. To save and submit for approval click **Submit**.

10. Click **Confirm** to confirm the submission.

9.6 Special Pricing Request Statuses

Table 9–2 provides information on different special pricing request statuses. The application supports sending notifications indicating the status of requests such as submission of a request, approval of a request and so on.

Table 9–2 Special Pricing Request Statuses

Status	Description
Draft	The special pricing request has been created but has not yet been submitted.
Pending Approval	The special pricing request has been submitted and is awaiting approval.
Approved	The special pricing request has been approved.
Declined	The special pricing request has been declined.

Table 9–2 Special Pricing Request Statuses

Status	Description
Closed	The date is greater than the waiting period specified in the Grace Period system profile. The Grace Period profile controls the duration within which users have to submit claims for a particular special pricing request after it's end date. Once the grace period is over, the status of the special pricing request changes to 'Closed' and users cannot submit claims for that particular request.

9.7 Claim Statuses

Table 9–3 describes the various statuses that a claim will go through.

Table 9–3 Claim Statuses

Claim Status	Description
New	The claim has been submitted.
Open	The claimed amount has not yet been paid to you.
Complete	The claim has been validated by the claims analyst.
Pending Approval	The claim is pending approval from the claims approver.
Approved	The claim approver approves the claim.
Pending Close	The claim is pending settlement.
Duplicate	The claim approver finds that a similar claim has been submitted for a request.
Rejected	If the claim information submitted does not match the original request, the claim approver can decline the claim.
Closed	The claimed amount has been paid out to you.

9.8 Users and Security

Access to requests are restricted by permissions and user types.

Permissions

- Super User Permission - ['OZF_SPECIAL_PRICING_SUPERUSER'] - Allows a partner user to view and update all special pricing requests owned by their organization.

User Types

- Partner Users - They are employees in the partner organization who can view and update special pricing requests that they created and special pricing requests where they are identified as the Requestor.
- Partner Administrators - They are employees in the partner organization who can view and update all special pricing requests owned by their organization.

10

Partner Funds Management

This chapter details business flows and procedures for Partner Funds Management, including requesting funds, submitting claims to collect the funded amount, and searching for fund requests. Sections in this chapter include:

10.1 Overview

Partner Funds Management enables you to submit and check the status of the fund requests and claims online. You can request funds for specific marketing activities and thus boost sales.

When you submit 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. The approver can return the request asking you to provide additional information. After you resubmit the request and the request is approved, you can execute the marketing activity and submit a claim to redeem money from the vendor. When you submit a claim, it is routed to the claim approver who will then validate the claim. When the claim gets approved, the vendor will pay the amount.

You will receive notifications about the fund request activity and you can link 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 your fund requests is approved.

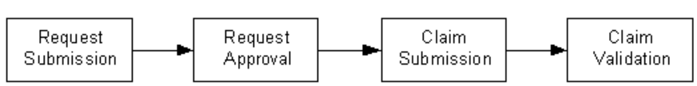
You can access a summary list of all the fund requests that you have access to. You can build personal views to quickly find the fund requests that you are most interested in.

10.2 Business Flow

Figure 10–1 illustrates the Fund Request to Partner Claim flow. Each box in the illustration is explained below:

- Section 10.2.1, "Request Submission"
- Section 10.2.2, "Request Approval"
- Section 10.2.3, "Claim Submission"
- Section 10.2.4, "Claim Validation"

Figure 10–1 Fund Request to Partner Claim Flow



10.2.1 Request Submission

Vendors set up program benefits, thus enabling you to enroll into programs to request channel marketing funds. To help understand the performance of your marketing activities, the system enables you to input your expected performance when submitting a fund request and your actual performance when submitting a claim for that fund request. For example, you may expect to generate 100 qualified leads with a particular mass mailing activity and then when you submit a claim for that activity, you would specify how many leads you actually generated.

You can select the marketing activity for which you want to receive funding and this drives the items that will appear in the Expense Breakdown region. You must fill in the requested amount down to the expense breakdown level. You can also capture the expected performance objective which is the outcome that is expected for an activity. For example, leads generated or revenue expected. The actual amount will be captured during the claim submission.

When you request for funds to execute marketing activities, the approver will review the fund request and approve, decline, or return the fund request.

10.2.2 Request Approval

When you apply for funds to execute marketing activities, the approver reviews the request and approves, returns or declines the request.

Approved Request

When a request is submitted, it is routed to the appropriate vendor approver. Notifications can be configured to be sent to you as soon as the request is either approved, declined or returned. When the approver is notified of a request, they review the request and either approve it or decline it.

Returned Request

If the approver requires additional information to be able to approve the request, they can return the request and ask you to provide additional information. For example, a vendor may perform an initial review of an incoming fund request and determine that he/she needs to review the collateral for the marketing activity before making a final approval decision. In this case the vendor approver would return the fund request to you and use the 'Collateral Requested' return reason. The approver can also add notes.

You can either attach the collateral to the fund request using the attachments functionality or send the collateral to the vendor outside the system and resubmit the fund request with a note explaining that the collateral has been submitted. Regardless of whether the request is being submitted for the first time or resubmitted with collateral attached or missing information filled in, the request is routed to the approver and will go through the approval process.

Declined Request

The vendor may decline an incoming request. The reason for declining the request will be tracked in the Decline Reason field. Additional details about the decision to decline the request will be included as a comment viewable as a note in the fund request.

10.2.3 Claim Submission

After your request is approved and you have executed the planned marketing activity, you can submit a claim to redeem money from the vendor. You can submit multiple claims per request and you will see a summary of the fund request when submitting a claim. This will help you understand what has been claimed so far and the amount that is outstanding.

You can specify the actual amount that has been spent on the activity and the amount that has been claimed for the activity. You can submit a claim by providing any proof of sale that the vendor requires. You can upload the proof of performance or send it through mail or fax.

You can access the status of the claim through your dashboard. The system also captures expected performance on the fund request and the actual performance on the claim which helps you analyze the success of the marketing expenditures.

10.2.4 Claim Validation

When you submit a claim, the status of the claim is 'Open'. If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see the claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. After the approver approves the claim, the system initiates payment.

10.3 Searching for a Fund Request

You can search for fund requests to view request details or submit a claim.

You can perform advanced searches based on request attributes. You can customize the criteria by adding or removing search attributes. You can save your search criteria and use it as the default view for fund requests.

While searching for a request, you can select the view name, number of rows displayed, description and optionally set the display and sort options. In addition, you can select columns that you want to display in the search results.

Use this procedure to create a personalized view to search for a fund request.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Fund Requests Quick Link > Fund Request page.
2. Enter details in the Simple Search region and click **Go**.

   The queried records are displayed.
3. Click **Save Search Criteria** to personalize your search and save it.

   The Create View page appears.
4. In the General Properties region, enter details about the request that you would base your search upon.
5. Click **Rename Columns/Totaling** to rename columns displayed in the table.
6. In the Column Properties region, select columns that should be displayed after performing a search and sort the order in which they should appear.
7. In the Search Query to Filter Data in your Table region, specify parameters and values to be displayed.
8. Click **Apply** to apply your changes.
9. Click **Apply and View Results** to apply and view your changes.

10.4 Submitting a Fund Request

Use this procedure to submit a fund request.

Prerequisites

None.

Steps

1. Log in as a partner user and navigate to Fund Requests Quick Link > Create Funds Request page.

   To export data, click **Export**. Data will be exported in the CSV (comma separated values) format. You can personalize your view to display relevant records, desired columns and the sorting order. Once your result table is displayed, click **Export** to export the records using .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Create**.

   In the Create Funds Request page, the name of your company is automatically populated in the Partner field.

   If you are the requestor, your name will be automatically populated in the Requestor's Name field. You can change the requestor's name to another person in the organization.

   The status and request number of the request will be automatically populated.

3. Select a benefit name from the Benefit LOV.

   The benefits available are ones that your organization has access to, through partner program memberships or because it is a default benefit.

4. Select a marketing activity from the Activity LOV.

   This is the marketing activity for which funding is being requested.

5. Select a start date and end date for the fund.

   This is the start and end date of the time frame in which the marketing activity is being executed.

6. Enter a name and description of the marketing activity in the Request Name and Description fields.

7. Enter the amount requested in the Requested Amount field.

   The requested amount is the amount being requested from the vendor to fund the marketing activity. The requested amount will be broken out to the expense level within the Expense Breakdown section.

8. Enter your contribution towards the marketing activity in the Partner Contribution field and click **Next** to proceed.

   Your contribution is how much your company will contribute towards the marketing activity.

9. Enter details in the Expense Breakdown region.

   This is the breakdown of expenses for the marketing activity. The Total Amount is the amount requested plus your contribution, for example, the vendor may only fund 50% of the total amount. The line items appearing within the Expense Breakdown are based on the Activity you selected.

10. Enter details in the Performance Objectives region.

    This is the outcome that is expected after executing the marketing activity. This information will enable vendors to measure the effectiveness of marketing expenditures by tracking expected performance on the requests and actual performance on the claim.

11. Enter details in the Products region.

    These products are the products or product categories that will be promoted by the marketing activity.

12. Enter details in the Geography region.

    These are the geographical regions where the marketing activity will be executed.

13. Optionally, you can enter details in the Attachments and Notes region, and save your changes.

    The Preview Submission page appears.

14. Click **Confirm** to submit your request.

10.5 Submitting a Claim

After the approval of the fund request, you can execute the marketing activity and submit a claim to redeem money from the vendor. The claims approver verifies the claim information and approves or declines the claim.

Use this procedure to submit a claim.

Prerequisites

A fund request must be in the 'Approved' status for the Submit Claim button to be enabled.

Steps

1. Log in as a partner user and navigate to Fund Requests Quick Link > Fund Request page.
2. Click **Submit Claim** for the request for which you want to submit a claim.

   The Create Claim page appears.

   The Pay To field is automatically populated with your organization name. The Claim Type field is automatically populated with the value 'Fund Request'. The status of the request is automatically populated in the Status field and the claim number is automatically populated in the Claim Number field.

   The Fund Request Summary region displays a summary of the request. You can view the total amount approved, amount that has been claimed, amount that has been paid out, and the outstanding amount. From the claim, you can link directly to the associated fund request. You can also view a summary list of all claims submitted for that request and link through to them.
3. Select a value from the Payment Type drop-down list.

   The payment types are credit memo or check.
4. Enter details in the Expense Breakdown region.

   This is the breakdown of expenses for the marketing activity. The 'Total' amount is the total amount you have requested for the marketing activity. This value should match the 'Total' amount of the fund request. The 'Requested Amount' is the amount requested for each activity. The Available Amount displays the amount that has not yet been claimed for each expense item. You can enter the Claim Amount for each expense item.
5. Enter details in the Performance Objectives region.

   These are the actual results for the marketing activity. This information will enable vendors to measure the effectiveness of marketing expenditures by tracking expected performance on requests and actual performance on the claim.
6. Click **Save** to save your claim and submit it later or click **Submit** to submit your claim.

10.6 Fund Request Statuses

Table 10–1 provides information on different fund request statuses. The application supports sending notifications about partner funds activity enabling the user to get e-mails. For example, when a fund request is returned to you or approved.

Table 10–1 Fund Request Statuses

Status	Description
Draft	The fund request has been created but has not yet been submitted.
Pending Approval	The fund request has been submitted and is awaiting approval.
Returned	The fund request has been returned by the approver asking for additional information.
Approved	The fund request has been approved.
Declined	The fund request has been declined.
Void	The fund request has been made void by a vendor superuser in the vendor organization.
Closed	The fund request is closed. The Grace Period profile controls the duration within which users have to submit claims for a particular fund request after it's approved date. Once the grace period is over, the status of the fund request changes to 'Closed' and users cannot submit claims for that particular request.

10.7 Claim Statuses

Table 10–2 describes claim statuses.

Table 10–2 Claim Statuses

Claim Status	Description
New	The claim has been submitted.
Open	The claimed amount has not yet been paid to you.
Complete	The claim has been validated by the claims analyst.
Pending Approval	The claim is pending approval from the claims approver.
Approved	The claim approver approves the claim.
Pending Close	The claim is pending settlement.

Table 10–2 Claim Statuses

Claim Status	Description
Duplicate	The claim approver finds that a similar claim has been submitted for a request.
Rejected	If the claim information submitted does not match the original request, the claim approver can decline the claim.
Closed	The claimed amount has been paid out to you.

10.8 Users and Security

Access to requests are restricted by permissions and user types.

Permissions

Super User Permission - ['OZF_FUND_REQUEST_SUPERUSER'] - Allows a partner user to view and update all fund requests owned by their organization.

User Types

- Partner Users - They are employees in the partner organization who can view and update fund requests that they created and fund requests where they are identified as the Requestor.
- Partner Administrators - They are employees in the partner organization who can view and update all fund requests owned by their organization.

Glossary

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

Customer

A purchaser of products or services.

Compensation

If your referral results in orders in the system, you will be compensated for the same. The compensation rates vary from initiative to initiative and by product. Once you are compensated, the referral is closed.

Deal Registration

When you resell a vendor's products, there is often a conflict between the vendor's direct sales force and your network. Deal Registration enables you to submit opportunities and receive the vendor's commitment not to compete directly and support you on the deal.

Enrollment

Enrollments enables vendors to administer and expedite your registration into Oracle Partner Management by enrolling you into programs.

Existing Inventory

When you request a special price for products that you have already purchased.

Fund Request

You can request funds for specific marketing activities and thus boost sales. You can submit and check the status of the fund requests and claims online.

Fund Request Claim

After a fund request is approved and you have executed the planned marketing activity, you can submit a claim to redeem money from the vendor.

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.

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.

New Inventory

When you request a special price for a new purchase.

Offer

Offers are generated in the background when a special pricing request is being approved, 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 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.

Partner

Partners are people or organizations with whom vendors 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 you 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 enables you to submit and check the status of the fund requests and claims online. You can request funds for specific marketing activities and thus boost sales.

Partner Funds Liability

The liability is the amount of money that a vendor has committed to pay to you for marketing activities but has not yet paid it.

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. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, referrals, deals, and special pricing.

Referral

You canrefer business opportunities that you cannot fulfill directly, to the vendor's organization. For example, the customer is interested in a product that you do not resell. You can then submit a referral and receive a percentage of the revenue generated.

Special Pricing

Special pricing enables you to submit and check the status of special pricing requests and claims online. A special pricing request enables you to request discounted pricing from the vendor. You can request discounts on competitive sales deals, specific end-customer deals, and on inventory that you have not been able to move.

Special Pricing Claim

When a special pricing request is approved, you can close the sale at the discounted price and submit a claim to collect payment.

Special Pricing Request Type

The request types are:

- Meet Competitor Price: When you want to match a competitor's price, you can ask the vendor to reduce the price to complete a sale.
- Bid Request: When you want to win a deal for a specific end-customer.
- Blanket Request: When you have inventory in his warehouse and have not been able to move it, you can ask for a discount to move the unsold inventory.

Special Pricing Liability

The liability is the amount of money that a vendor have committed to pay you for discounts but has 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.

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.

Vendor

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

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