

Oracle® Partner Management

Vendor User Guide

Release 11*i*

Part No. B13537-01

July 2004

Oracle Partner Management Vendor User Guide, Release 11i

Part No. B13537-01

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

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Preface

Welcome to the Oracle Partner Management Vendor User Guide, Release 11i.

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

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

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

- Oracle Self-Service Web Applications.

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

- The Oracle Applications graphical user interface.

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

See [Other Information Sources](#) for more information about Oracle Applications product information.

How To Use This Guide

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

The Oracle Partner Management Vendor 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 describes the key features of Oracle Partner Management in this release.
- [Chapter 2](#) provides information on the process flows from a business perspective, for some of the modules in Oracle Partner Management.
- [Chapter 3](#) provides information on partners, contacts and how you can create new partners by inviting them to enroll into programs.
- [Chapter 4](#) describes how you can create programs and define characteristics for a program after defining a program.
- [Chapter 5](#) provides information on how you can enroll partners into programs, view enrollment requests that are pending approval and approve or reject enrollment requests.
- [Chapter 6](#) provides information on opportunities and how you can route opportunities to a partner and approve or reject opportunities that are routed to you.
- [Chapter 7](#) provides information on how you can manage referrals, including reviewing referrals and approving submitted referrals.
- [Chapter 8](#) provides information on how you can manage deal registrations, including registering, approving and monitoring deals.
- [Chapter 9](#) provides information on how you can respond to your partners' requests for special discounted pricing, including, approving or declining requests.
- [Chapter 10](#) provides information on how you can manage and distribute funds to your channel partners, including, approving or declining requests.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be

accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

Other Information Sources

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

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

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

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

Related Guides

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

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

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

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

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

Guides Related to This Product

Oracle Receivables User Guide

Use this user guide to learn how to implement flexible address formats for different countries. You can use flexible address formats in the suppliers, customers, banks, invoices, and payments windows in both Oracle Payables and Oracle Receivables. This user guide also explains how to set up your system, create transactions, and run reports in Oracle Receivables.

Oracle Receivables Tax Manual

This manual provides information about calculating tax within Oracle Receivables, Oracle Order Management, Oracle Sales and Marketing, and Oracle Web Customers. It includes information about implementation procedures, setup forms and windows, the Oracle Receivables tax calculation process, tax reports and listings, and tax-specific open interfaces.

Oracle *interMedia* User's Guide and Reference

This user guide and reference provides information about Oracle *interMedia*. This product enables Oracle9i to store, manage, and retrieve geographic location information, images, audio, video, or other heterogeneous media data in an integrated fashion with other enterprise information. Oracle Trading Community Architecture Data Quality Management uses *interMedia* indexes to facilitate search and matching.

Oracle Self-Service Web Applications Implementation Guide

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

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Implementation Wizard User Guide

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

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

“About” Document

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and

others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

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

Oracle Workflow Administrator's Guide

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

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle Workflow API Reference

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

Oracle Applications Flexfields Guide

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

Oracle eTechnical Reference Manuals

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

Oracle Applications Message Manual

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

Training and Support

Training

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

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Partner Management working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

OracleMetaLink

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

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

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as

SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

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

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

About Oracle

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

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

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

Introduction to Oracle Partner Management

This chapter provides an overview of Oracle Partner Management and describes 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:

- [Partner Dashboard](#)
- [Channel Manager Dashboard](#)
- [Partner Profiling](#)
- [Programs and Enrollment](#)
- [Opportunity Management](#)
- [Referral Management](#)
- [Deal Registration](#)
- [Special Pricing Management](#)
- [Partner Funds Management](#)

1.2.1 Partner Dashboard

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

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

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

The key features are:

- Configurable User Interface - Oracle Partner Management leverages Oracle iStore's template management framework to deploy the dashboard. The template management framework enables you to configure the layout of the dashboard. You can target partner promotions on the dashboard and deliver partner specific content on the dashboard. You can deploy multiple partner portals to target different partner segments.
- Navigational Bins - Oracle Partner Management provides bins to enable partners to access their 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 and overcome any usability issues with the previous release.

- 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 Channel Manager Dashboard

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

The key features are:

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

from Dallas, Greg will automatically be assigned to NP as the channel manager by the system. You can also manually assign users to partner organizations thereby bypassing the territory definition. Users with the 'Super User' role can access all partners irrespective of the territory definition.

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

1.2.3 Partner Profiling

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

1.2.4 Programs and Enrollment

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

1.2.5 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 partners.

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

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

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

When you assign an opportunity to a partner, the partner can view details and accept it. At any time, the partner 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.
- Multiple routing types allows to assign opportunity to one or multiple partners, using serial, parallel or joint routing.
- Ability to manually search for partners based on their profile.

Automatic Partner Assignment

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

Automatic Partner Search

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

Manual Partner Search

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

1.2.6 Referral Management

Referral Management enables partners to refer business opportunities that they cannot fulfill directly, to your organization. For example, the partner learns of an opportunity for a customer who is interested in a product that the reseller does not

sell. In this scenario, partners can submit a referral to the vendor and receive a percentage of the revenue.

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

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

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

The key features are:

- Partners can submit referrals online and track the progress of the referral from submission to acceptance to payment.
- Configurable Questionnaire to collect relevant information about a potential opportunity.
- Workflow driven approvals and notifications - You can assign approvers based on multiple criteria, such as geography, product lines or partner types. Oracle Workflow is configured to send notifications to relevant people, at each step of the referral life cycle.
- Flexible setups - Program managers can setup referral initiatives based on geography and/or product lines. Users can define different commission rates based on product lines.
- Channel Managers and Registration Managers can review submitted referrals, check for duplicates and approve or decline it.
- Integration with TCA to verify and merge customer and contact information and maintain the integrity of your customer database.
- Integration with Oracle Sales to automatically carry over referral information to the opportunity or lead record and through the sales cycle.
- Integration with Oracle Trade Management to automate referral commission calculation and payment.

1.2.7 Deal Registration

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

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

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

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

The key features are:

- Partners can submit deal registrations online. Once the registration is approved, the partner can work on the indirect opportunity record that is automatically generated and assigned to the partner.
- Workflow driven approvals and notifications - You can assign approvers based on multiple criteria, such as geography, product lines or partner types. Oracle Workflow is configured to send notifications to relevant people, at each step of the deal life cycle.
- Flexible setups - Program managers can setup deal initiatives based on geography and/or product lines.
- Channel Managers and Registration Managers can review registered deals, validate information, check for duplicate deals, and approve or decline it.
- Integration with TCA to verify and merge customer and contact information and maintain the integrity of your customer database.
- Integration with Oracle Sales to automatically carry over deal information to the opportunity record and through the sales cycle.

1.2.8 Special Pricing Management

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

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

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

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

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

The key features are:

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

1.2.9 Partner Funds Management

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

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

Partner Funds Management provides search capabilities that enables you to locate requests or perform analysis on marketing activity. You can configure Oracle Workflow to organize the approval process for incoming requests including any number of levels of approvers.

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

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

The key features are:

- Partners can request funds, review fund request information, view fund request status, submit collateral for approval, and submit claims.
- You can attach funds to partner programs, submit fund requests on behalf of a partner.

- You can define standard processes and for each activity type, you can define expense breakdown, approvals, and approvers.
- You can also create claims.

1.3 What's New in this Release

Note: If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

The following features are added in this release:

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

1.3.1 Enhancements to Existing Functionality

The following features are enhanced in this release:

- [Programs and Enrollment](#)
- [Partner Attributes](#)

Programs and Enrollment

- **Distributor Initiated Invitation** - Distributors can invite their managed partners or resellers to join programs.
- **Renewal Process** - The program renewal process has been enhanced and partners can now renew their memberships into multiple programs. If the partner chooses to renew multiple memberships at one time, the system presents a consolidated questionnaire to collect their profile information,

summary of all applicable terms and conditions, and consolidated payment information.

- **Benefits Framework** - Oracle Partner Management extends benefits to partners based on their program participation. The benefits framework is tightly integrated with various Oracle E-business suite applications such as Oracle Trade Management, Oracle Marketing, E-Commerce, and Oracle Sales to enable the partner to refer business, register deals, request for discounts, funds and place orders.
- **Proforma Invoice** - This provides a user friendly view of program fees and taxes during self-service enrollment process. Partners can now view a pro forma invoice inclusive of local taxes, during the enrollment process.
- **Program Copy** - You (channel managers) can copy existing program definitions and make minor modifications without having to recreate the information. You can also select attributes of the original program that should to be copied into the newly created one.
- **Program Prerequisites** - Most companies require their partners to meet certain prerequisites before they can enroll into programs. You can define prerequisites that a partner must meet to be eligible to enroll in a program.
- **Global/Subsidiary Member Types** - You can now manage partners with subsidiary organizations. Subsidiary partners can enroll into programs under their global partner's membership. You can specify different contractual and payment terms for global partners and their subsidiaries.

Partner Attributes

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

New derived attributes have been seeded to track partner performance.

Oracle Partner Management Business User Flows

Oracle Partner Management supports the following business flows. Sections in this chapter include:

- [Section 2.1, "Invite New Partner to Partner Login to Partner Enrollment"](#)
- [Section 2.2, "Partner Advanced Search to Marketing List"](#)
- [Section 2.3, "Lead to Opportunity to Quote to Order"](#)
- [Section 2.4, "Referral to Partner Compensation"](#)
- [Section 2.5, "Deal Registration to Opportunity"](#)
- [Section 2.6, "Special Pricing Request to Partner Claim"](#)
- [Section 2.7, "Fund Request to Partner Claim"](#)

2.1 Invite New Partner to Partner Login to Partner Enrollment

Oracle Partner Management offers the ability to create partners by inviting them to enroll a partner into a program. When you invite a partner to enroll in a program, the partner receives a notification and registers himself/herself. You can administer and expedite a partner's registration and enrollment into the program.

2.1.1 Business Scenario

Mike Driver works at Vision Corporation as a channel manager. Mike meets a prospective partner for their 'Desktop Computers' program. Mike decides to invite the partner to join the program. Mike enters the relevant company information of the new partner, and selects a program for them to be invited into.

Mike then decides to offer a 10% discount in the enrollment fees for the program. When the new partner receives the program invitation through email, he/she logs into the partner dashboard, and enrolls into the program. Once the partner submits the enrollment request, Mike can approve his/her membership into the program.

The new partner receives any benefit associated with the 'Desktop Computers' program, and starts working with Vision Corporation immediately.

For information on the business flow, see [Section 4.2, "Business Flow"](#).

2.2 Partner Advanced Search to Marketing List

Oracle Partner Management enables you to save an advanced search result as a marketing list, and, in turn market to your partners.

2.2.1 Business Scenario

Mike Driver works at Vision Corporation as a channel manager. Mike wants to search for partners and save the search. Mike can save the search as a list and use the list to run marketing campaigns and events.

For information on the business flow, see [Section 3.2, "Business Flow"](#).

2.3 Lead to Opportunity to Quote to Order

Oracle Partner Management offers a complete solution for the lead to opportunity to quote to order flow where you and partners can share opportunities, create quotes and place orders.

Once a lead is entered in the system, the lead engines process it automatically for qualification and ranking and select the best channel based on the lead attributes. If the channel is identified as indirect, then you can route opportunities to partners based on configurable business rules. Once the partner's sales representatives review the opportunity and accept it, they can follow the opportunity to its fulfillment by working on the opportunity, creating a quote, sharing the quote with the customer and the vendor and then placing the order.

Finally, partners can view the status of their orders.

2.3.1 Business Scenario

Vision corporation (the vendor) has a hot new lead that requires to buy 100 new desktops in less than a month. Vision has a total budget of less than \$50,000. Since it is a small deal, it is channeled as indirect. Because of the lead size and short timeframe, the partner can be better equipped to close this business than Vision's direct sales representatives.

Every lead imported into the system is processed through the lead engine that automatically qualifies, ranks and channels the lead. Based on the rule described above, the system automatically channels some leads to partners. The best partner for each lead is identified based on membership level, functional expertise and geographical proximity.

When a new lead is imported for Business World (the customer), a financial company in California requiring to buy 100 new desktops, Technology Solutions is selected as they are premier partners in California for desktops. The partner matching engine automatically assigns the opportunity to Technology Solutions and notifies Rhonda Sellers, the partner's sales contact. She reviews the opportunity, accepts it and works to close the deal. She creates a quote and applies her discounts. She places the order and closes the opportunity as 'Won'.

For information on the business flow, see [Section 6.2, "Business Flow"](#).

2.4 Referral to Partner Compensation

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

When a partner submit a referral, it is routed to the appropriate approver(s). Approvers are notified of the referral and they review it and approve, reassign or decline it. When the referral is approved, the partner receives a commission if an approved referral generates a sale. Commissions are calculated after the customer places the order and are reviewed internally and accepted by the partner. The compensation is reviewed and approved internally and then sent to the partner for acceptance. After the partner accepts the compensation, the vendor pays the commission.

2.4.1 Business Scenario

Rhonda Sellers works at Technology Solutions, a partner of Vision. (the vendor) Rhonda learns that University of California at Berkeley is replacing desktops in some of their labs. However, Technology Solutions does not resell desktops. Rhonda decides to refer the potential lead to Vision to get compensated if the deal goes through.

Rhonda creates a referral and submits it. The timeframe for the purchase is within the next month and the total budget is about \$30,000 for 20 new desktops. She enters a note for reviewers that Technology Solutions cannot fulfill the deal directly as they do not resell the product. The approval process is flexible and can be configured to match your current business processes. Vision has configured a referral approval policy to automatically route all incoming referrals to the partner's channel manager for approval.

Mike Driver is the channel manager at Technology Solutions. Mike is notified of Rhonda's referral via e-mail and he reviews the referral and decides whether the referral is valid. If it is valid, he can look for potential duplicates for the referral entered.

If he finds a duplicate, he can link it and decline the referral, or, accept the referral as the partner adds value during the sales cycle by playing an influencer role. If he does not find a duplicate, he can approve the referral. At this point, he will need to deduplicate the customer and contact information before an actual referral is created in the system. A different approver can be specified for this step if needed. Mike reviews the list of potential customer duplicates and finds the actual customer record. Mike reviews the contact information and finds the actual contact record. A new lead is created in the system. The lead is processed though the lead engine to qualify, rank and channel the lead. Lisa Jones is identified as the owner of the lead based on territory definitions.

Mike views the status of the referral and sees that the referral was approved.

Lisa Jones, a sales manager with Vision, logs into the system, reviews the lead and decides to accept the lead. She contacts the customer and decides to convert the lead into an opportunity. Lisa creates a quote for the opportunity and then places an order.

After the entire order is shipped to the customer, the compensation for the partner is calculated. To pay the partner, a claim is automatically created and assigned to a claim analyst for research. The claim analyst researches the claim and starts the settlement.

After the claim is approved internally, Rhonda is notified that she needs to review and accept the compensation. When Rhonda accepts it, the claim is sent to the credit department. Rhonda could also request additional assistance and enter in a note, details for the request. Vision's credit department is notified of the incoming claim and the claim analyst validates the claim and initiates payment to Technology Solutions.

For information on the business flow, see [Section 7.2, "Business Flow"](#)

2.5 Deal Registration to Opportunity

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

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

2.5.1 Business Scenario

Rhonda Sellers works at Technology Solutions, a partner of Vision. (the vendor) Rhonda learns that University of California at Berkeley is replacing desktops in some of their labs. Rhonda is actively working on this deal and decides to register the deal with Vision to avoid competition from Vision's sales force.

Rhonda registers the deal. The timeframe for the purchase is within the next month and the total budget is about \$30,000 for 20 new desktops. She enters a note for the reviewers saying that she is registering this deal and believes that the opportunity is already in an advanced status. The approval process is flexible and can be

configured to match your current business processes. Vision has configured a deal registration approval policy to automatically route all incoming deal registrations to the partner's channel manager for approval.

Mike Driver is the channel manager at Technology Solutions. Mike is notified of Rhonda's deal via e-mail and he reviews the deal and decides whether the deal is valid. If it is valid, he can look for potential duplicates for the deal registered.

If he finds a duplicate, he can link it and decline the deal. If he does not find a duplicate, he can approve the deal. At this point, he will need to deduplicate the customer and contact information before an opportunity is created in the system. A different approver can be specified for this step if needed. Mike reviews the list of potential customer duplicates and finds that the actual customer record is already defined in the customer database. Mike selects the record and reviews the contact information and selects the actual contact for the lead. A new opportunity is created in the system. Both, the partner and the partner contact are assigned to the opportunity on the external sales team. Mike is also assigned to the internal sales team for the opportunity.

Rhonda views the status of her registration and also receives an e-mail notifying her that her deal registration has been approved. Rhonda views the opportunity details for the opportunity that is created as a result of her registration. She updates the opportunity and creates a quote for the opportunity. She submits a quote for approval. Approval is immediate, as she did not request any additional discount. Rhonda publishes the quote to the customer. The customer accepts the quote and Rhonda places an order from the quote. The system updates the deal registration and closes it as the opportunity is 'Won'.

For information on the business flow, see [Section 8.2, "Business Flow"](#)

2.6 Special Pricing Request to Partner Claim

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

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

When a partner submits a request, it gets routed to the appropriate approver(s). Approvers are notified of the request, and they review it and approve, reassign, or decline it. When a request is approved and the partner closes the sale, he/she can submit a claim to receive the discount approved. Claims can be submitted manually

or in bulk by uploading POS data that includes special pricing authorization information. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, you can make the payment to the partner as a credit memo or can issue a check. Partners can also check the status of claims online.

2.6.1 Business Scenario

Rhonda Sellers works at Technology Solutions, a partner of Vision. (the vendor) Rhonda has a reseller who has encountered a sales situation where a competitor is offering a lower price. The reseller needs discounted pricing to match the competitor's price and win the deal.

Rhonda submits her request. The approval process is flexible and can be configured to match your current business processes. Vision has configured a special pricing approval policy to automatically route all incoming requests to the partner's channel manager for approval.

Mike is the channel manager who works at Vision. Mike is notified of Rhonda's incoming special pricing request and if he is also the approver, he reviews the request and can reassign the request to another approver, or, decline the request. For example, he could decline the request because it has missing information and send it back to the submitter for re-submission. Mike reviews the special pricing request to determine whether there are any existing requests for the same end-customer deal. The system intelligently tracks special pricing liability which is the discount you may have to pay out to the partner, and, automatically ties this liability into Oracle General Ledger for safe, conservative accounting. Mike decides that there are no existing requests for this particular end-customer deal and approves the request.

Rhonda receives an e-mail notifying her that her special pricing request has been approved. Now, she wants to submit a claim to receive payment on the promised discount. The claims process can be automated through a POS file (Point of Sale). So, if Technology Solutions submits POS data into Vision and includes special pricing authorization information, the system can automatically validate the information and start the payment.

Vision's credit department is notified of the incoming claim and the claim analyst validates the claim and initiates payment to Technology Solutions.

For information on the business flow, see [Section 9.2, "Business Flow"](#)

2.7 Fund Request to Partner Claim

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

2.7.1 Business Scenario

Rhonda Sellers works at Technology Solutions, a partner of Vision. (the vendor) Technology Solutions has access to channel marketing funds from Vision, to support execution of marketing activities agreed upon by Vision and Technology Solutions.

Rhonda submits a fund request into Vision for a specific lead generation activity. The approval process is flexible and can be configured to match your current business processes. Vision has configured a fund request approval policy to automatically route all incoming fund requests to the partner's channel manager for approval.

Mike Driver is the channel manager who works at Vision. Mike is notified of Rhonda's incoming fund request and reviews the request. He links into the Budget tab where he sees the default budget for this MDF benefit. He can source from one or many budgets and approves the request.

Rhonda receives an e-mail notifying her that her fund request has been approved. Now, she wants to submit a claim to receive the approved funds. She specifies whether she wants to receive payment as a credit memo or check and specifies information about actual performance and claim amounts at the Expense Breakdown level.

Vision's credit department is notified of the incoming claim and the claim analyst validates the claim and initiates payment to Technology Solutions.

For information on the business flow, see [Section 10.2, "Business Flow"](#)

Understanding Partners

This chapter provides information on partners and contacts and how you can create new partners. Sections in this chapter include:

- [Section 3.1, "Overview"](#)
- [Section 3.2, "Business Flow"](#)
- [Section 3.3, "Searching for a Partner"](#)
- [Section 3.4, "Creating a Partner"](#)
- [Section 3.5, "Converting a Customer to a Partner"](#)
- [Section 3.6, "Creating a Partner List"](#)
- [Section 3.7, "Managing a Partner"](#)
- [Section 3.8, "Understanding Partner Contacts"](#)
- [Section 3.9, "Users and Security"](#)

3.1 Overview

Oracle Partner Management helps you connect with your indirect channels to create a functional business relationship. Partners can help you close business by selling your products and assisting in your pre-sales, sales and post-sales inter-company processes. They can provide industry expertise or add value to your products and services. Different types of partners may include prospects, end users, original equipment manufacturers, resellers, and value added distributors.

3.2 Business Flow

Figure 3–1 illustrates the Partner Advanced Search to Marketing List flow. Each box in the illustration is explained below:

- [Search Partner](#)
- [Partner List](#)

Figure 3–1 *Partner Advanced Search to Marketing List Flow*



3.2.1 Search Partner

You can search for a partner using the Advanced Search feature. This feature enables you to search for partners based on a partner's profile information. You can modify your search criteria using the Modify Criteria button. Based on profile attributes, you can save your search. You can customize your search criteria by adding or removing attributes to tailor your search. You can save your search as a list and associate this list with a marketing campaign or a promotion.

3.2.2 Partner List

Based on your search criteria, partners will be displayed and this can be created as a list. Oracle Partner Management integrates with Oracle Marketing to enable you to generate partner lists. These lists can then be used to run marketing campaigns and events thereby enabling marketing to partners.

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

3.3 Searching for a Partner

You can search for partners based on profile attributes such as partner name, partner contacts, leads, opportunities and so on. You can customize your search criteria by adding or removing attributes to tailor your search. You can save your search criteria and also use it as the default search page.

While searching for a partner, you can select the organization, address, partner, sales team and relationship parameters and optionally set the display and sort options.

In this release, columns have been added to display derived profile attributes (information calculated based on partner data and transactions) and you can select columns that you want displayed in the search results.

The Personalize Screen is divided into three sections:

- **Search Section:** You can include partner contact and partner attributes in the search criteria. You can add/remove fields pertaining to Partner Contact or Partner Attributes.
- **Display Option:** You can choose the display columns, sort order and the number of rows that should be displayed on the Partner Contact Summary page.
- **Save Search:** You can save your search and make it the default search for the Partner Contact Summary Screen by selecting the 'Use As Summary Page Default' checkbox.

Use this procedure to enter details for a search criteria.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page.
2. Click **Search** or **Personalize**.
The Partner Search page appears.
3. In the Partner Information region, enter details about the partner that you would base your search upon.

4. In the Display Options region, enter the columns that should be displayed after performing a search.
5. In the Save Search As region, enter a name for the search and select the Use As Summary Page Default check box to save it as the default search page.
6. Optionally, you can click **Modify Criteria** to modify the information for your search. You can select or deselect the partner contact and partner attributes that should be present in the search section of the Personalize page. Each attribute has its own defined display style.

3.4 Creating a Partner

You can create a partner in three ways:

- Inviting them to enroll into programs.
- Converting existing customers to partners.
- Partners can register themselves via the self-service registration process.

For information on how partners can register themselves, see *Partner Registration* in the *Oracle Partner Management Partner User Guide*.

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

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

Use this procedure to invite a new partner.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page.
2. Click **Invite New Partner**.

The Create Partner page appears.

3. Enter details in the Address and Contact Information region and click **Next**.
4. In the Create User page, select a default currency and enter a login user name and password for the partner.
5. Select a User Type radio button.
The options are: Business and Administrator.
6. Click **Next**.
The Invite Partner page appears.
7. Select a program from the Program Name drop-down list.
8. Enter any discounts if applicable.
9. Enter details in the Enrollment Fees region and click **Invite Partner**.

3.5 Converting a Customer to a Partner

You may have many customers and any customer can become a partner of your organization at any time. Before converting a customer, you must decide the Partner type and Member type that the converted customer will fall under. When the customer is converted to a partner, the partner will be enrolled in the default program.

Use this procedure to convert existing customers to partners.

Prerequisites

None.

Steps

1. Log in as a channel administrator and navigate to Partners > Convert Customer to Partner page.
The Partner Conversion page appears.
2. Select a customer from the Customer Name LOV. (filtered on organizations without a partner relationship)
3. Enter the Partner Type and Member Type.
If you select the 'Subsidiary' Member Type, the Global Partner LOV will be enabled.
4. Click **Convert to Partner**.

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

3.6 Creating a Partner List

Oracle Partner Management integrates with Oracle Marketing to enable you to generate partner lists. These lists can then be used to run marketing campaigns for partners. Based on profile attributes, you can create a list and save your search. Based on the search criteria, partners will be displayed and this can be created as a list.

Use this procedure to create a list.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partners Quick Link > Partner Summary.
2. Personalize your search, view the results, and click **Create as List**.
The Save List page appears.
3. Enter necessary details and click **Save**. You will receive a confirmation message.
4. Click **Show List Detail** to view details of the list. You can view details of the list only if you have the appropriate Audience Workbench permission.
5. To return to the Partner Summary page, click **Return to Partner Summary**.

3.7 Managing a Partner

You can manage a partner's information in the Update Partner page. The Update Partner page is available via the Update Partner button in the Partner Details page. The Update Partner button is disabled if you do not have privileges to update a partner's details. The Partner Details page is used to display information of the selected partner. You can access additional information about the partner through various sub tabs displayed on this page.

The Partner Summary page has a seeded search called 'My Partners' which is the default saved search. It displays partners where the logged in user and his/her

direct and indirect reports are on the partners' channel team. So, you can view partners only if you are a channel manager.

Based on the role of the logged in user, the Partner Details page can be viewed and updated. The subtabs available in the Partner Details page are described below. Depending on the role and responsibility of the logged in user these subtabs are displayed or hidden.

Performance

This tab displays the seeded performance metrics for different categories. The attributes that you view in the Key Metrics bin in the channel manager dashboard is a subset of this tab.

Trends

You can also view the trend of a partner's sales performance.

The sales performance chart displays the trends of a partner's performance over a period of time. You can filter your search based on performance attributes that are used to track partner performance. For example, currency amounts, quantity or ratios (percentages).

Transactions

You can view a partner's transactions such as claims, offers, opportunities, orders, referrals, deals, fund requests, and special pricing requests. The transactions can be filtered by the status. You can also drill into the details of the transaction if you have appropriate permissions.

Profile

This tab displays profile attributes and you can edit attributes, add validation information and view validation history. You can also add contacts and the organization address.

Memberships

This tab displays a partner's memberships and the benefits associated with the membership. Benefits are available through the Hide/Show functionality. You can also invite a partner from here and provide discounts on the membership fee required for a program.

Managed Partners

You can view this tab if the selected partner is a global partner or a distributor or both. You can see a summary view of subsidiary partners or managed partners.

Channel Team

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

If you are not a channel manager, channel managers returned by the Territory Assignment Program, are assigned to the partner.

If the Territory Assignment Program does not return any channel manager, and the logged in user is not a channel manager the Default channel manager is assigned to the channel team.

Territory Assignment Program

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

Channel managers assigned to the partner can view, update details about the partner and have the responsibility to maintain the relationship with the partner organization. For example, the channel manager responsibility includes approving opportunity routing to a partner.

If the channel manager needs to be reassigned, it happens through a concurrent program. This includes changes in resources assigned to a territory and changes in the territory definition that impacts the channel team. For example, the channel manager leaves.

Sales representatives and sales managers who can access leads and opportunities routed to the partner can also access the partner record. Sales representatives assigned to work on the opportunity with the partner can view a partner's details

but cannot update details. The partner super user can view and update a partner's details.

If the 'Override Territory Assignment' flag is checked, the current channel manager will not be removed when the concurrent job runs.

If resource groups are setup, managers of the group can view partner records assigned to the members of the group. Managers of a parent group can access partners assigned to members (and manager) of the child group.

Notes

You can view a partner's notes and also add a note.

Interactions

You can view a partner's interactions. These can include interactions associated with deal registrations, program memberships, enrollment requests, opportunities, referrals, fund requests, and special pricing requests.

3.8 Understanding Partner Contacts

Partner contacts are people in a partner's organization with whom you are in contact by telephone, mail, or in person to perform business transactions. They are extensions of the marketing, sales, and support staff in a partner's organization. There can be more than one contact for a partner organization. Partner contacts have to be proficient with your product line(s) to guarantee end customer satisfaction. Proficiency and certifications of a partner's contacts, play an important role in assigning and routing sales and support transactions to partners.

3.8.1 Creating a Partner Contact

Use this procedure to create a partner contact.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page.
2. Select the Profile tab and click **Create Contact**.

The Create Contact page appears.

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

The Contact Details page appears.

4. Optionally, you can click **Create User Account** to create a user while creating the contact.
5. Enter a user name, password, default country, default currency, user type and click **Apply**.

The details you entered are published.

6. Enter details in the Profile, Address, and Notes tabs.

The Profile tab displays profile attributes and you can edit attributes and view attribute history. The Address tab displays the contact's addresses and you can also create an address here. The Notes tab displays a partner's notes and you can add a note as well.

3.9 Users and Security

Access to partner information is controlled based on user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view partners that they created. An example of a vendor user is a channel manager who is responsible for managing a set of partner.
- Vendor Managers - They are employees in the vendor organization who can invite partners to enroll into a program, view and update partner information. This depends on the PV_VIEW_ALL_PARTNERS and PV_UPDATE_ALL_PARTNERS permissions.

Permissions

- PV_INVITE_NEW_PARTNER - The **Invite New Partners** button is displayed only if the logged in user is a channel manager and has this permission.
- PV_VIEW_ALL_PARTNERS:
 - If a vendor has this permission and is not a channel manager, the **Update** icon is disabled for partner records displayed in the Partner Summary page. The user can only view partner information.

- If a vendor has this permission and is also a channel manager, the **Update** icon is enabled for partner records in the Partner Summary page, where the vendor is in the partners' channel team.
- If the vendor does not have this permission and is not a channel manager, but has the role of a manager in a PRM group and has channel managers reporting to him/her, the system brings all partners where the vendor's direct and indirect reports are in the partners' channel team. The logged in user cannot update partner details.
- PV_UPDATE_ALL_PARTNERS:
 - If a vendor has this permission, the **Update** icon is enabled for all partners displayed in the Partner Summary page.
 - If a vendor has this permission and is a channel manager, the **Create As List** button is displayed.
 - If a vendor does not have this permission and is not a channel manager, but has the role of a manager in a PRM group and has channel managers reporting to him/her, the system brings all the partners where the vendor's direct and indirect reports are in the partners' channel team. The logged in user cannot update partner details.
 - If a vendor does not have this permission and is not a channel manager, and does not have a manager role in a PRM group, records are displayed in the Partner Summary page.

Program Management

This chapter describes how you can create programs and define characteristics for a program after defining a program. Sections in this chapter include:

- [Section 4.1, "Overview"](#)
- [Section 4.2, "Business Flow"](#)
- [Section 4.3, "Program Approvals"](#)
- [Section 4.4, "Program Characteristics"](#)
- [Section 4.5, "Creating a Program"](#)
- [Section 4.6, "Users and Security"](#)

4.1 Overview

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

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

You can organize and offer specific benefits to partners. Benefits such as sales opportunities, product information, marketing collateral, services, and training can be grouped within a program. Partners can gain access to benefits by enrolling into a program that provides these benefits.

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

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

4.2 Business Flow

Figure 4–1 illustrates the Invite New Partner to Partner Login to Partner Enrollment Flow. Each box in the illustration is explained below:

- [Invite New Partner](#)
- [Partner Login](#)
- [Partner Enrollment](#)

Figure 4–1 Invite New Partner to Partner Login to Partner Enrollment Flow

4.2.1 Invite New Partner

You can invite a partner to join a program. The channel manager or channel representative can invite new partners for enrollment in a program. The channel manager captures basic information about the partner organization including address details, partner contact details and program related information when inviting them to join a program.

4.2.2 Partner Login

After the partner receives a notification, they can view the program overview and decide to enroll in the program and thus get a membership in the program.

4.2.3 Partner Enrollment

The partner can enroll in the program through the Available Programs Bin or can enroll into programs that have been initiated by a distributor. During the enrollment process, the partner can review the contract template attached to a program and agree or disagree with the contract. They can also choose to print and fax or mail a signed copy of the contract later, and continue with the enrollment process.

4.3 Program Approvals

You can create programs at the 'Program' level or the 'Membership' level.

When a program is created, it must be approved by valid individual(s) within your organization before a partner enrolls in it. Approvers are set up while creating a program type and can be designated by a name or role. They receive either an e-mail or notification alerting them to review programs and approve them. When you submit a program for approval, a notification is sent to the approver associated with the program type. A sequence is associated with approvers to route program approval requests sequentially.

When a program is created, the program status is initially set to 'New' which is the default value.

- When a program is created at the 'Program' level and submitted for approval and if the person creating the program and the program owner are the same, the program gets approved. The status of the program changes to 'Approved'. The program can be activated, after which the status of the program changes to 'Active'.
- If the person creating the program and the program owner are not the same, the program approver receives a notification indicating that the program is awaiting his approval. To approve the program, the approver should have the responsibility 'Workflow User Web Application'.
- When a program is created at the 'Membership' level, you must mention whether a membership fee is required and the duration of the membership. At this level, you can also decide if distributors can invite partners to enroll in the program and if a subsidiary partner requires a global membership, to be able to enroll in the program.

When a program is in the 'Active' status, it is available for partner enrollment.

4.4 Program Characteristics

After creating a program, you must define characteristics such as requirements, pricing, legal terms, and payment terms.

4.4.1 Requirements

Requirements evaluate the partner's enrollment. You can view whether the partner enrolling has either passed or failed the base criterion that is set for the program.

Some organizations require their partners to meet certain prerequisites before they can enroll into certain programs. You can define prerequisites that a partner must meet, to be eligible to enroll into a given program. Partner program memberships can be setup as prerequisites for joining another program. Terminated or expired prerequisite memberships terminate or expire any memberships that are dependent upon them.

4.4.2 Pricing and Payments

A price is defined by associating a program with a price list. Different price lists can be associated to a program using the 'Pricing & Payments' side navigation link. The side navigation link appears only if you selected the 'Membership Fee Required' check box while creating the program.

Multiple prices can be defined by associating a program with multiple price lists. If multiple price lists are associated, you must define the precedence so that the appropriate price is selected. The multi currency feature of Oracle Advanced Pricing (QP) enable price lists to select the appropriate price.

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

After a price list is created in QP, you can associate it with a specified currency and enter start and end dates for the price list.

4.4.3 Legal Terms

You can create contract templates with appropriate terms and conditions and associate these contract templates to a particular geography, program, and a member type.

You can define a contract or terms and conditions for a program using Oracle Contracts and associate the contract with a program.

Oracle Partner Management uses Oracle Contracts to store and manage partner contracts. For a contract to be available in Oracle Partner Management, users must create a contract template under the 'Partner Contracts' category. While attaching a contract template, contract templates are displayed and not the actual contract. When a partner's enrollment is approved, a new contract is automatically created from the template.

For information on how to create a new contract template, see *Setting Up Contracts* in the *Oracle Partner Management Implementation Guide*.

4.4.4 Enrollment Questionnaire

You can create questions that partners may or may not have to answer (you can specify if it is mandatory for a partner to answer a question) while enrolling into a program. You can also enter additional information like title, header or footer information.

The enrollment questionnaire is linked to the enrollment of the program. During the enrollment process, answers entered by a partner are populated based on the profile attributes associated with a question. For example, if a partner already has profile attribute values for 'Number of Employees' within the system, the question is pre-populated with the existing value during enrollment.

You can also define the Program Overview page here. This page is customizable and can include images and formatted text to present program overview information to enrolling partners.

Program Summary

When a vendor creates programs, he/she can create a summary of the program which reflects details of a program. The summary is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. The summary can be the setup type, name, program start and end dates, owner, partner type, country, language, and description.

Program summary can be set up by navigating to the enrollment questionnaire and clicking the Program Overview button.

To store content in OCM, there are security restrictions, which are governed through a site level profile called 'IBC: Use Access Control'.

- If set to 'No', any user can create the content and extra setups need not be done in OCM. This option enables any person (that can access OCM) to change content through the OCM UI.
- If set to 'Yes', (because of customer requirements for security in OCM) users should be given explicit access to that particular content type so that they can create/update/retrieve the content.

4.4.5 Approval Checklist

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

4.4.6 Upgrade Rules

Upgrade rules allow a membership to be upgraded from one program to another. A membership program can be upgraded to a higher level to provide more benefits to partners.

4.4.7 Notifications

Notifications contain messages that can request users to take some action and/or provide users with information. Different types of notifications are attached to a

program. Notifications are configured at the 'membership' level, under the Notifications side navigation link.

You can send notifications as e-mail messages if the notification preference is set to 'Plain text mail', 'HTML mail', or 'Plain text mail with attachments' in the Preferences page. The Oracle Workflow administrator sets up the Notification Mailer concurrent program to run. Some notifications are generated on the fly with the triggering of some event, and some are generated by the execution of some concurrent requests.

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

All notifications are linked to specific e-mail messages that are configured in the Oracle Workflow Framework. When events are triggered, Oracle Partner Management initiates the respective e-mail within Oracle Workflow. The partner's e-mail address is provided in the e-mail message. For time based notifications, Oracle Partner Management has daily batch programs to analyze notifications to be executed. The frequency of batch programs is configurable.

The different notifications are:

- **Thank You Notification:** When a partner successfully enrolls into a program, this notification is generated by Oracle Partner Management. This notification is generated after a partner successfully enrolls into a program.
- **Welcome Notification:** When a partner requests for enrollment into a program, the approver in the vendor organization takes action on the enrollment request, either by approving it or rejecting it. If the approver approves the enrollment request, the requestor receives a welcome notification.
- **Rejection Notification:** When a partner's request for enrollment into a program is rejected by the approver, the requestor gets a rejection notification.
- **Contract Not Received Notification:** You can set the number of days/weeks/months within which if a contract is not received, a notification is triggered. When partner users successfully enroll into a program, they have to submit a signed copy of a contract for the program. If the signed copy is not received within the specified time limit, the enrollment system sends a notification to the partner user. The system repeats the notification until the signed copy of contract is received. This is managed by the execution of a daily scheduled concurrent request program in a batch mode. In these type of

notifications, the repetition depends upon the notification rule set for the program.

- **Membership Renewal Notification:** You can set the number of days/weeks/months within which if a membership expires, a notification is triggered. When an enrollment is going to expire, Oracle Partner Management sends this notification to partners. This notification is also managed by the execution of a daily scheduled concurrent request program in a batch mode.

Change Membership Level for a Program

Partners are notified if they have an offer to upgrade or downgrade from one program or membership level to another, for enrollment. Partners are also notified when they are invited to enroll into a new program. You can select all partners for a specified program and upgrade, downgrade, terminate or send new invitations within the same program. Sending a notification to a partner for the Upgrade, Downgrade, Terminate, New Invites process, depends upon the 'Do Not Send Message to Partner(s)' check box value.

4.4.8 Enrolled Partners

You can view partners who are enrolled in a particular program. You can view detailed information of partners such as contract status and balance. You can also view a list of enrolled partners within a partner program/membership, with the primary contact name, and their respective start and expiration dates of enrollment.

Terminate Partners

This functionality forcefully terminates enrolled partners from a given membership level program. The administrator can select a reason for termination and a message is stored in the history Log. The partner is terminated with immediate effect and the contract is also terminated. A notification is sent to primary users of the partner organization informing them about the termination.

Downgrade Partners

You can forcefully downgrade a list of selected partners from one level program to another as per downgrade rules. You can edit a message to be sent to the partner using the workflow engine. Notifications are sent to partners regarding this action.

The partner is downgraded with immediate effect. The partner's current membership ends and the partner is automatically enrolled into the new program. The contract is also upgraded to this new program.

Upgrade Partners

You can upgrade a partner's enrollment into a program to a new membership level program as per upgrade rules. You can select a program or membership level program to upgrade a partner, and then edit a message to be sent to the partner(s). You can also extend a discount amount or percentage for their enrollment fees.

Invite Partners

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

4.5 Creating a Program

You can create programs that provide valuable information, incentives, and promotions to a wide partner community.

Use this procedure to create a program.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Partner Programs Quick Link > Partner Programs page.
2. Click **Create New Program**.
The Create Program page appears.
3. Select a program type using the Program Type drop-down list.
Program type refers to the type of program that is set up by the administrator with the approvers hierarchy already set up. This helps the program to be routed for approvals automatically.
4. Enter a name in the Program Name field.
5. Select a level using the Level drop-down list. The two levels are:

- Program Level: If the 'Program' level is selected and if the person creating the program and the program owner are the same, the program gets approved.
 - Membership Level: If the 'Membership' level is selected, the Membership Fee Required, Membership Duration, Enable VAD Initiated Invitation and Require Global Membership fields are activated.
6. Select dates in the using Start Date and End Date LOV.

The start and end dates are defaulted to parent programs dates respectively. Users can still choose a start and end date in between the partners' start and end date.
 7. Select an owner from the Owner LOV and enter a description in the Description field.

Owner refers to the owner of the program which is defaulted to the logged in user. The LOV retrieves individuals with the role of owning a program.
 8. Click **Continue** to edit program details.

The Edit Program page appears.

If you selected the 'Membership' level in step 5, the Requirements, Pricing & Payments, Legal Terms, Enrollment Questionnaire, Approval Check List, Upgrade Rules, Notifications, Tracking, Enrolled Partners, side navigation links are enabled. For information on these program characteristics, see [Program Characteristics](#).
 9. To submit the program for approval, click **Submit For Approval**.

If the owner of the program and the approver are the same, the program gets approved immediately and the status of the program changes to 'Approved'.

If the owner of the program and the approver are not the same, the program approver receives a notification, indicating that the program is awaiting his approval. To approve the program, the approver should have the responsibility 'Workflow User Web Application'.
 10. Click **Activate** to make the program active.

When program characteristic information is completed and you submit the program for approval, the program status changes from 'New' to 'Submitted for Approval'. This initiates the approval process declared for the setup type selected for 'Partner Programs'. The approver is assigned and notified of the new program. A notification is sent to the approver requesting a program approval. If the

approver approves, the program status changes to 'Approved'; If the approver rejects, the program status changes to 'Rejected'.

A notification is sent to the program owner notifying the new program status.

- If 'Approved', program owner can choose to activate the program.
- If 'Rejected', program owner can edit the program characteristics, and resubmit the program for approval.

4.5.1 Copying a Program

You can create a program in one step by copying from an existing program. You can also select attributes of a program that has to be copied.

Use this procedure to copy a program.

Prerequisites

None.

Steps

1. Log in as a channel administrator and navigate to Partner Programs > Partner Programs page.
2. Click **Copy**.
3. Select a new source program from the LOV.

Depending on details of the program that is selected, other fields like Program Start Date, Program End Date, Description are populated. The Owner field is pre-populated with details of the logged in user. Attributes are populated depending on the setup of the source program.

4. Select the attributes that need to be copied.
5. Click **Copy** to copy the source program.

4.6 Users and Security

Access to programs is controlled based on user types.

User Types

- Vendor Users - They are employees in the vendor organization who can view programs that they created. An example of a vendor user is a channel manager who is responsible for managing a set of partner.
- Vendor Approvers - They are employees in the vendor organization who can approve programs. After they have performed the approval, they continue to have access to the program.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.

Partner Enrollments

This chapter provides information on how you can enroll partners into programs, view enrollment requests that are pending approval and approve or reject requests. Sections in this chapter include:

- [Section 5.1, "Overview"](#)
- [Section 5.2, "Enrollment Requests"](#)
- [Section 5.3, "Enrollment Approval"](#)
- [Section 5.4, "Approving or Rejecting an Enrollment Request"](#)
- [Section 5.5, "Users and Security"](#)

5.1 Overview

Partner Enrollment enables you to manage program memberships and administer benefits. You can organize and offer specific benefits to partners. Benefits such as sales opportunities, product information, marketing collateral, services, and training can be grouped within a program. Partners can gain access to benefits by enrolling into a program that provides these benefits.

Programs are created and made available to partners via the Available Programs bin in the partner dashboard. Once the partner initiates the enrollment process, he/she is guided through a series of steps to provide more information about himself/herself.

5.2 Enrollment Requests

Enrollment requests are routed to approvers in the system. Approvers can view all pending enrollment requests, drill into a request, and approve or reject a request.

- If you are an administrator, you can view pending enrollment requests.
- If you are a channel manager, you can only view enrollment requests pertaining to you.
- If you are an approver, you can view details of an enrollment request and make a decision on the enrollment request. Details include information about the partner's company, questionnaire details, contract and payment details, benefits and approval check list.

An enrollment request comprises of:

- [Enrollment Request Details](#) - The enrollment request details is a summary of the information submitted by the partner for enrollment.
- [Enrollment Request Summary](#) - The enrollment request summary lists the summary of pending approvals.
- [Enrollment Log](#) - The enrollment log captures events pertaining to an enrollment request and events such as change of statuses or change of information.

5.2.1 Enrollment Request Details

The enrollment request details contains the following sections:

Header Information

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

Questionnaire Details

This section contains the current status of the enrollment form. The form submitted, is measured against requirements of a program. Oracle Partner Management automatically grades answers submitted by the partner against requirements defined for a program. The status can be either:

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

A partner can be allowed to enroll into a program even if the enrollment status is 'Failed'. The status does not prevent a partner from being enrolled in a program. You can view the enrollment questionnaire and the criteria of each question as defined within the program.

Contract

This section contains the contract number, name of the contract description, and status. The status of the contract can be:

- 'Accepted' - The partner selects the 'Accept' button during the enrollment process.
- 'Awaiting Contract' - The partner wants to manually print out the contract to either mail or fax it to you.
- 'Not Signed' - When the contract information is not complete.
- 'Rejected' - When the partner rejects a contract.

You can change the contract status of an enrollment request.

Payment

This section contains the enrollment fee information. The taxes and discounts are calculated based on the integration with Oracle Order Management.

Benefits

This section displays benefits that partners receive, if they are enrolled in the program. This information is retrieved from the program definition.

5.2.2 Enrollment Request Summary

You can view a summary screen of enrollment requests for a program. You can review the list of enrollment requests for a program and also search for enrollment requests.

Profile attributes are validated against qualification rules for the program and you can view whether the partner qualifies for a program. Even if a partner does not meet the qualification criteria, you can approve the enrollment request.

You can also view information about statuses of each element (enrollment form, contract, and payment) and the status of the request.

5.2.3 Enrollment Log

The enrollment log captures events such as change of status or information. If defined for the program, the details provide a checklist of tasks for approvers to complete before they can approve a request. The checklist can be enforced depending on the settings in the program or membership level definition.

5.3 Enrollment Approval

Enrollment Approval integrates with Oracle Approvals Management (OAM) to find approvers that are defined for the application. It also integrates with Oracle Workflow to notify approvers and send reminder notifications.

When a partner user submits an enrollment request, the appropriate approver is identified by the application and the approver is notified. If the approver does not take action for 'n'days, the system sends reminder notifications until the approver takes action. Once the approver approves the request, the partner is enrolled into the program automatically with valid membership dates or contract dates.

When a program enrollment form is submitted for approval, the partner is notified about the status of his/her enrollment request. Partners whose enrollment requests are approved, receive benefits of the new program. Additional benefits and privileges are expedited to the partner. These privileges are reflected when the partner logs into the partner dashboard.

When you approve a request, the enrollment status changes or the request is routed to the next approver.

- Final approval sends a notification to partners to inform them that they have been approved.
- Approved partners are added to the list of enrolled partners.
- Approved partners immediately receive benefits of a program.

When you reject a request, the enrollment status changes.

- Rejection terminates the routing of the enrollment request.
- Rejected partners are notified.

5.4 Approving or Rejecting an Enrollment Request

Use this procedure to approve an enrollment.

Prerequisites

None.

Steps

1. Log in as the channel manager and navigate to Message Center Quick Link > Message Center page.
2. Click an enrollment request that requires approval.
The Enrollment Request Details page appears.
3. Click **Reassign** to reassign the request to another approver.
4. Click **Request Information** to request for more information about the enrollment request and click **Submit**.
5. Click **Approve** or **Reject** to approve or reject the request.

You must review the task list before you officially approve or reject a request. This task list is created while defining the program.

When you approve the request, the partner gets enrolled into the program automatically.

When you reject the request, the partner is notified.

5.5 Users and Security

Access to enrollments is controlled based on user types.

User Types

- 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.
- Partner Users - They are employees in the partner organization who can view and update enrollment requests that they created.

Opportunity Management

This chapter explains procedures to create, monitor and manage indirect opportunities. Sections in this chapter include:

- [Section 6.1, "Overview"](#)
- [Section 6.2, "Business Flow"](#)
- [Section 6.3, "Searching for an Opportunity"](#)
- [Section 6.4, "Creating an Indirect Opportunity"](#)
- [Section 6.5, "Assigning an Opportunity"](#)
- [Section 6.6, "Approving an Opportunity Assignment"](#)
- [Section 6.7, "Withdrawing an Opportunity Assignment"](#)
- [Section 6.8, "Routing Statuses"](#)
- [Section 6.9, "Users and Security"](#)

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. New opportunities can originate from leads, marketing campaigns or can be manually entered. Sales representatives or channel managers can assign opportunities to partners.

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

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

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

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

Automatic Partner Assignment

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

Automatic Partner Search

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

Manual Partner Search

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

6.1.1 Routing Types

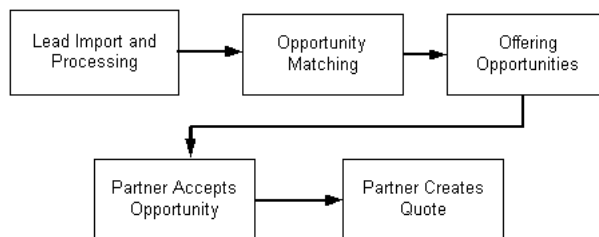
Oracle Partner Management supports several routing types:

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

6.2 Business Flow

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

- [Lead Import and Processing](#)
- [Opportunity Matching](#)
- [Offering Opportunities](#)
- [Partner Accepts Opportunity](#)
- [Partner Creates Quote](#)

Figure 6–1 Lead to Opportunity to Quote to Order Flow

6.2.1 Lead Import and Processing

To create an indirect opportunity enter the required information and select an indirect channel.

6.2.2 Opportunity Matching

Once the opportunity is created, you can match it to the most appropriate partner. You must be able to identify the most appropriate partner based on pre-defined rules or you can manually search for a partner based on a partner's skills and expertise.

You can search for partners in one of the following ways:

- Manually - You can match opportunities by selecting a preferred partner or perform a search using partner profile attributes to identify the best partner.
- Partner matching engine - The partner matching engine matches partners to opportunities based on predetermined matching criteria.

When submitting the opportunity, you can decide whether you want to route it to one partner or multiple partners. You can select a routing type. See [Routing Types](#).

Channel Manager Approval

While routing an opportunity to a partner, you can require the channel manager to approve your assignment by deselecting the 'By Pass CM approval' checkbox. This is based on the profile option 'PV: Bypass CM Approval for Campaign Routing'.

When an opportunity is created, the status of the opportunity is 'Unassigned'. The channel manager is notified and needs to sign on and approve the selected list of partners, to whom the opportunity must be routed. While waiting for the channel manager's approval, the status changes to 'Matched'. When you offer the

opportunity to the partner and are waiting for the partner to accept the opportunity, the status changes to 'Offered'. The partner can accept or decline the opportunity. If the partner accepts the opportunity, the status changes to 'Active'. If the partner rejects the opportunity or the channel manager rejects the matched list of partners, the status changes to 'Recycled'. If the opportunity routing is cancelled, the status changes to 'Withdrawn'. If the partner decides to return opportunity to you after initially accepting it, the status changes to 'Abandoned'.

6.2.3 Offering Opportunities

When you offer the opportunity to a partner, the partner's contact is notified. The partner logs into the dashboard, sees the opportunities bin, reviews the opportunity and decides to accept or decline it. If the partner accepts it, he/she can access all the details about the opportunity record.

You can limit the time period a channel manager can hold a matched opportunity before it is forwarded to the assigned partner. If the channel manager does not process the opportunity, the routing status automatically changes to 'Offered' and the opportunity is offered to the partner.

You can also set up partner timeouts. If the partner does not respond within that time frame, the opportunity is routed to another partner. Mail alerts are triggered to inform relevant parties that the offer has timed out.

6.2.4 Partner Accepts Opportunity

After a partner accepts an opportunity, they can access the record and add more users to the team for that opportunity. All designated contacts in their company are given access to details, with the authority to update the details. Additional sales people from their organization can be given access by adding them to the sales team. The partner sales team can work on the opportunity, updating the details when required and work the opportunity to its conclusion - won or lost. At the end of the process the opportunity is closed and e-mail alerts are sent again to inform relevant parties.

If the partner declines the opportunity, they cannot access the record and the channel manager is notified.

6.2.5 Partner Creates Quote

Once a partner accepts the opportunity, they can create a quote or a proposal for the customer and publish it to the customer. The partner can add products to the quote

and select the price list for the quote. They can now submit the quote for approval to the vendor.

Once the partner, the customer, and you agree on the quote, the partner can place an order and monitor the order status.

6.3 Searching for an Opportunity

You can perform advanced searches based on opportunity 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 opportunities.

While searching for an opportunity, you can select the organization, address, partner, sales team and relationship parameters and optionally set the display and sort options.

Use this procedure to enter details for a search criteria.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Opportunities Quick Link > Opportunity Summary page.
2. Click **Search** or **Personalize**.
The Opportunity Search page appears.
3. In the Opportunity Information region, enter details about the opportunity that you would base your search upon.
4. In the Customer Information region, enter details about the customer that you would base your search upon.
5. In the Sales Information region, enter details about the sales team that you would base your search upon.
6. In the Display Options region, enter the columns that should be displayed after performing a search.
7. In the Save Search As region, enter a name for the search and select the Use As Summary Page Default check box to save it as the default search page.

6.4 Creating an Indirect Opportunity

Use this procedure to create an opportunity.

Prerequisites

None.

Steps

1. Log in as a channel manager and click the Opportunities Quick Link.
The Opportunity Summary page appears.
2. Click **Create**.
The Create Opportunity page appears.
3. In the Opportunity region, enter the following details:
 1. Enter an opportunity name.
 2. Assign an opportunity owner. Enter the full or partial name and click **Go**. The owner is automatically added to the internal sales team of this opportunity.
 3. Select the desired currency that this opportunity will be using from the drop-down list.
 4. Enter the budget amount for this opportunity, if known.
4. In the Customer Information region, enter the partial or full customer name and click **Go** to select an existing customer. Or click **Create New Customer** to create a new customer.
5. In the Progression region, enter the following details:
 1. Select a Status from the drop down list.
 2. Optionally, add a Sales Methodology from the drop down list. The "Eyeglasses" icon displays the details of the current selection. Click to view details.
 3. Select the Win Probability for the opportunity from the drop down list.
 4. Select the Sales Stage from the drop down list.
 5. Optionally, select the Close Date.
6. In the Additional Information region, enter the following details:

1. Optionally, relate this opportunity to an existing project. Select the project and click **Go**.
2. To create a new project, select the Create a Project radio button and enter a project name.
3. Optionally, select the key competitor for this opportunity.
4. Optionally, select the source of the opportunity.
5. To create an indirect opportunity, select an indirect channel from the Sales Channel drop-down list.
6. Optionally, select the Response Channel for this opportunity from the drop-down list.
7. Optionally, related an Offer to the opportunity. Enter the offer name and click **Go**.
7. In the Purchase Items region, enter purchase items by selecting a Product Category and Amount. Additionally, select a Unit of Measure. Click **Add Multiple Items** to create multiple purchase lines for the same product with different forecast dates.
8. Optionally, you can enter contacts. To add an existing person, enter the last name in the Add a Person field and click **Go**.

When adding or creating a contact for this opportunity, you are also creating a relationship between this person and the customer for whom you are creating the opportunity.
9. To create a note, select a note type from the Type drop-down list. Select a status from the Status drop-down list. You can enter text in the Note box.
10. Click **Create** to create the opportunity.

6.5 Assigning an Opportunity

Use this procedure to route an opportunity to one or more partners.

Prerequisites

An indirect opportunity must exist.

Steps

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

2. Click an Opportunity hyperlink in the 'Unassigned' status.
3. In the Opportunity Details page, click the Partner side navigation link.
The Opportunity: abc page appears.
4. Select a partner to whom the opportunity should be routed. In the Preferred Partner field, click **Go** and select a partner.
5. You can add more partners to the list by selecting one of the following methods from the Add more partners to the list drop-down list:
 - Automatic Partner Matching: In this method, the partner matching engine selects the appropriate rule based on opportunity attributes (if multiple matches are found, the rule with the higher precedence wins).
 - Manual Search: In this method, you can search for partners based on profile attributes. After the list of partners is returned, you can select one or more partners.

If you added a preferred partner, this partner is displayed at the top of the list when you use Automatic Partner Matching or Manual Search.

6. Select a routing type using the Routing Type drop-down list.
The routing type determines how the opportunity is offered to partners on the list. For information on routing types, see [Routing Types](#).
7. Select the 'By-pass CM Approval' check box to bypass the channel manager's approval.

If you do not select the 'By-pass CM Approval', the channel manager must approve or reject the assignment.

If you are a sales representative and you do not by-pass the channel manager, the channel manager is notified. The channel manager must sign on and approve the selected list of partners.

If you are the channel manager, you can submit and approve the routing without the need to sign on again.

8. Click **Submit Routing**.

The status of the opportunity changes to 'Matched'.

6.5.1 Adding Partners to the External Sales Team

You can also add partners to the external sales team without assigning the opportunity to them. Unless the opportunity is assigned to partners, they will not be able to view the opportunity.

Use this procedure to add a partner as an external sales team member.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Opportunities Quick Link > Opportunities page.
2. Click an Opportunity hyperlink with an 'Unassigned' status.
The Opportunity Details page appears.
3. Click the Sales Team > External side navigation link.
The Opportunity: abc page appears.
4. Add a partner as an external sales team member by clicking **Go** and selecting the partner.
5. Add a contact as an external sales team member by clicking **Go** and selecting the contact.
6. Click **Update** to save your changes.

6.6 Approving an Opportunity Assignment

If you are a channel manager and an opportunity is routed to a partner that you are managing, you can approve or reject the opportunity assignment.

Use this procedure to approve an opportunity assignment.

Prerequisites

An indirect opportunity in the routing status 'Matched' must exist.

Steps

1. Log in as a channel manager and click the Opportunities Quick Link > Opportunity Summary page.

2. Look for the opportunity routed to a partner that you are managing and click the Opportunity hyperlink.
The Opportunity: abc page appears.
3. Review the opportunity and click the Partner side navigation link.
4. View the partner selected for the opportunity; the response status should be 'Matched'.
5. Change the response status from 'Matched' to 'Approve'.
6. If you think, this partner should not be working on this opportunity, select **Reject**.
7. Click **Update**. The response status of the opportunity should be 'Matched Approved'.
8. Click the Opportunities subtab and look for the opportunity. The routing status of the opportunity should be 'Offered'.

6.7 Withdrawing an Opportunity Assignment

If you decide that the routing is inaccurate, you can withdraw the routing. All partners are withdrawn from the routing.

Use this procedure to withdraw an opportunity.

Prerequisites

An indirect opportunity in the routing status 'Offered' must exist.

Steps

1. Log in as a channel manager and click the Opportunities Quick Link.
The Opportunity Summary page appears.
2. Look for an opportunity you routed to a partner and click the Opportunity hyperlink. The Routing status is 'Offered'.
The Opportunity: abc page appears.
3. Review the opportunity and click the Partner side navigation link.
4. Click **Withdraw Routing** to withdraw the routing.

6.8 Routing Statuses

Table 6–1 indicates the different routing statuses of an opportunity.

Table 6–1 Routing Statuses

Status	Description
Unassigned	The opportunity has not been routed.
Matched	The channel manager needs to approve the match before the opportunity can be offered to the partner.
Offered	The partner has been offered the opportunity and notified.
Active	The partner has accepted opportunity.
Recycled	Matched partners were rejected or offered opportunity was rejected by all partners.
Withdrawn	The channel manager or sales representative canceled opportunity assignment.
Abandoned	The partner decided to return opportunity to vendor after initially accepting it.

6.9 Users and Security

Access to opportunities are restricted by user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view opportunities they have created and opportunities they have access to, because they are on the partner's channel team. An example of a vendor user is a Channel Manager who is responsible for managing a set of partners. A sales representative managing an opportunity generated from a referral is another example of a vendor user.
- Vendor Managers - They are employees in the vendor organization who can view, update and approve an opportunity assignment.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.
- 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.

Referral Management

This chapter describes procedures for referral management, including creating, approving and monitoring referrals. Sections in this chapter include:

- [Section 7.1, "Overview"](#)
- [Section 7.2, "Business Flow"](#)
- [Section 7.3, "Searching for a Referral"](#)
- [Section 7.4, "Submitting a Referral"](#)
- [Section 7.5, "Managing Referrals"](#)
- [Section 7.6, "Referral Statuses"](#)
- [Section 7.7, "Users and Security"](#)

7.1 Overview

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

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

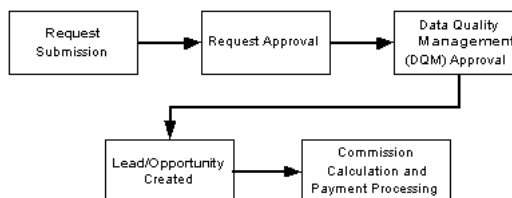
Vendors and partners receive notifications about the referral activity and can navigate directly from the notification into the associated referral. Notifications are configured by vendors and sent when the status changes, for example, when a referral is approved.

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

7.2 Business Flow

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

- [Request Submission](#)
- [Request Approval](#)
- [Data Quality Management \(DQM\) Approval](#)
- [Lead/Opportunity Created](#)
- [Commission Calculation and Payment Processing](#)

Figure 7–1 Referral to Partner Compensation Flow

7.2.1 Request Submission

The partner accesses the system and submits a referral specifying customer and contact information as well as product categories, amount and any required additional information.

7.2.2 Request Approval

When a request is submitted, Oracle Workflow routes the request to the appropriate vendor approver. Workflow manages the entire approval process and you can configure notifications to be sent as soon as the request is approved, reassigned, or declined for more information. Oracle Workflow is driven by Oracle Approval Management (AME).

For more information on workflow, see the *Oracle Workflow Guide*.

The approval process includes two steps:

- Verify the data
- Check for duplicate records

You can review information entered by the partner. If you are satisfied with the data, you can proceed to the next step and check if there are already duplicates in the system.

If a duplicate referral, lead, or opportunity exists, the approver selects the referral and links it with the referral submitted by the partner. If a duplicate referral does not exist, the approver approves the referral after viewing the details.

After the approval, the customer and contact of the referral is checked against existing customers and contacts in the system. For more information, see [Data Quality Management \(DQM\) Approval](#).

7.2.2.1 Reassign Request

Approvers can reassign requests to another vendor user and specify a reason and provide comments. Workflow routes the request to the new approver, who is notified that a new referral requires his/her approval. The alternate approver gets notified via notifications that are set up.

7.2.2.2 Decline Request

If the reviewer finds that the information is incomplete or inaccurate or that there is a duplicate, they can decline the referral and provide comments. Workflow notifications are sent to partners and to other users based on setup.

7.2.3 Data Quality Management (DQM) Approval

Data Quality Management (DQM) is a tool that is used to check for potential duplicate customers and contacts for a given customer or contact. The system finds potential duplicates using rules defined within DQM.

After the reviewer approves the referral, the referral must go through the DQM approval process before it is actually fully converted into a lead or an opportunity.

Duplicate Customers

If a potential duplicate customer exists, the referral status changes to 'Pending customer dedup'. The approver selects the existing customer and the system links the selected customer with the referral.

If a duplicate customer does not exist, the approver creates a new customer and the system links the new customer with the referral.

Duplicate Contacts

If a duplicate contact exists, the approver selects the existing contact and the system links the selected contact with the referral.

If a duplicate contact does not exist, a new person with a 'contact' relationship with the specified customer is automatically created by the system.

7.2.4 Lead/Opportunity Created

When a referral is approved, it is automatically converted into a lead or an opportunity. If the referral is converted to a lead, the lead is processed through the lead engine and the system qualifies, ranks and assigns the lead. The lead is then assigned to a sales person and eventually converted into a qualified sales opportunity.

After the opportunity is won and the order booked and eventually shipped, the compensation process begins. If the opportunity is lost and closed, the referral status is updated and the partner is notified.

7.2.5 Commission Calculation and Payment Processing

When the order is shipped, the system automatically calculates the compensation due to the partner. Then, a claim is automatically created and assigned to a claim analyst. The claim analyst researches the claim, and starts the compensation process. After the claim is approved internally, the compensation amount is published to the partner who needs to accept the compensation or ask for more assistance. When the partner agrees with the compensation amount, the claimed amount is assigned to the payables department for processing the payment.

7.3 Searching for a Referral

You can perform advanced searches based on referral 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 referrals.

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 channel manager 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 referral 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 on behalf of a partner.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Referrals Quick Link > Referrals page.
2. Select the desired referral initiative from the Create drop-down list and click **Go**.
3. In the Create Referral page, enter a referral name in the Referral field.
4. In the Partner field, select a partner from the partner LOV.

The LOV lists partners that are enrolled in the referral initiative you selected in the previous page.
5. 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.

6. 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 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.
7. Enter details in the Additional Details region.
8. 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.
9. Select a currency for the referral.

This becomes the currency displayed on the lead or opportunity record once the referral is approved.
10. Enter notes in the Notes region by selecting a note type from the Note Type drop-down list. Select a value from the Status drop-down list to make the note private, internal or public.

You can use notes to store and maintain any extra information/comments while you are creating the referral.
11. To save a draft without submitting, click **Save**.
12. To save and submit for approval, click **Submit**.

7.5 Managing Referrals

If you are an approver, you can view referrals that are awaiting your approval or that you have already approved or declined. If you are a channel manager, you can view referrals submitted by the partners you manage. If you are the superuser you can view all referrals.

You can view the status of a given referral and manually change the status of a referral if you are a superuser.

You can evaluate a referral and approve or decline it.

7.5.1 Approving a Referral

Use this procedure to approve a referral.

Prerequisites

None.

Steps

1. Log in as an approver and navigate to Message Center Link or Referrals Quick Link > Referrals page.

You can approve referrals from either of the links mentioned in the previous step. Navigating via the Message Center Link provides you a list of open notifications and you can navigate to a referral from here. You can view the notification indicating that a referral is submitted for your approval. Use the steps below to navigate via the Referrals Quick Link.

2. Click the **Update** icon for a referral.

The Referral Details page appears.

3. Review the referral details. Once you decide the data entered by the partner is valid and this is a potential good lead, click **Continue** to review potential duplicates.

The Referral Duplicates page appears. If the system has not found any potential duplicates, the **Approve** button is displayed. You can then directly approve the referral.

4. Review the potential duplicates for the referral submitted by the partner.

The system displays open leads, opportunities and referrals on similar customer records and product categories. If you find a duplicate record, select the record and click **Link and Decline** to decline or **Link and Accept** to accept.

5. If the referral is not a duplicate referral, click **Accept**. If the approver is also the customer approver, the user goes through the customer deduplication process. Otherwise, the next approver is notified. If there is no other approver, the referral is approved. The status changes to 'Pending Customer Dedup' if the system finds potential customer duplicates.

7.5.2 Reassigning or Declining a Referral

You can reassign and decline referrals that have been submitted for approval.

Use this procedure to reassign or decline a referral.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Referrals Quick Link > Referrals page.

2. In the Referrals page, you can view referrals that are submitted.

By default, you can view referrals that require your approval.

3. Click the **Update** icon for a referral.

The Referral Details page appears.

4. You can decline a referral by clicking **Decline**. You can also link the referral to another referral and approve or decline it.

5. Click **Reassign** to reassign the referral to another approver.

The Reassign page appears.

6. Select a different country from the Country LOV or select a new approver and click **Apply**.

The list of approvers displays all channel managers.

7.5.3 Using DQM Tools to Deduplicate Customer and Contact Data

Data Quality Management (DQM) is a tool from the Trading Community Architecture (TCA) group that is used to check for potential duplicate customer/contact/address and/or contact points for a given customer/contact/address/contact points attributes.

When a referral is created, the customer name, reseller entered by the partner needs to be matched to an existing record in TCA, if any.

- If no matches are found for the customer, reseller (via DQM), a new customer is automatically created by the system.

- If there are no matches for the person specified (via DQM), a new person with a 'contact' relationship with the specified customer is automatically created by the system.
- If there are possible customer matches, the referral status changes to 'Pending Customer Dedup' after the referral approver has approved a submitted referral. The DQM approver is notified and can review the matches to review the organization and merge with an existing organization or choose to create a new customer.
- If there are possible person matches, the DQM approver can review the matches and select an existing "contact relationship" in the system or choose to create a new contact.

Use this procedure to check for customer duplicates and ensuring that the leads/opportunities are generated for the right customer.

Prerequisites

A referral in the status 'Pending Customer Dedup' must exist.

Steps

1. Log in as an approver and navigate to Message Center Link or Referrals Quick Link > Referral Summary page.

You can approve referrals from either of the links mentioned in the previous step. Navigating via the Message Center Link provides you a list of open notifications and you can navigate to a referral from here.

2. In the Referral Detail page, click **Continue**.

Potential duplicate customers are displayed.

3. If you find a duplicate, select the record and click **Use Existing Organization**.

If the system finds a duplicate contact, choose between **Use Existing Contact** or **Create New Contact**.

4. If you do not find a duplicate customer, click **Create New Organization**. The system creates a new record using the information entered by the partner in the customer fields. In addition, a new contact is created using information entered by the partner.

7.5.4 Process Compensation

Use this procedure to process a partner's compensation.

Prerequisites

A claim should have been generated.

Steps

- 1. The channel manager is notified that a claim is created.
- 2. Log into Oracle Trade Management.

For information on how to process claims, see *Oracle Trade Management User Guide*.

7.5.5 Viewing Referral Log

The referral log tracks the history of the referral.

Use this procedure to view the referral log.

Prerequisites

None.

Steps

- 1. Log in as a channel manager and navigate to Referrals Quick Link > Referrals page.
- 2. Click a referral hyperlink or click **Update**.
The Referral Details page appears.
- 3. Click the Log tab to view the referral log.

7.6 Referral Statuses

Table 7–1 provides information on different statuses.

You receive notifications that notify the status of the referral at various stages in the referral process.

Table 7–1 Referral Statuses

Technical Name	Status
APPROVED	Approved
APPRVD_PENDNG_CSTMР_DQM	Pending Customer Review

Table 7–1 Referral Statuses

Technical Name	Status
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

7.7 Users and Security

Access to referrals are controlled based on user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view referrals that they created. They can also view referrals that they have access to, because they are on the partner's channel team. An example of a vendor user is a channel manager who is responsible for managing a set of partners. Another example of a vendor user is a sales representative managing an opportunity generated from a referral.
- Vendor Managers - They are employees in the vendor organization who can view and update all referrals within their hierarchy.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.

- Vendor Approvers - They are employees in the vendor organization who can approve referrals. After they have performed the approval, they continue to have access to the referral.
- DQM Approvers - They are employees in the vendor organization who can run DQM in order to link customer and contact information on the referral into the master customer record in the system.
- 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.

Permissions

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

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.

Deal Registration

This chapter describes procedures for deal registrations, including registering, approving and monitoring deals. Sections in this chapter include:

- [Section 8.1, "Overview"](#)
- [Section 8.2, "Business Flow"](#)
- [Section 8.3, "Searching for a Deal Registration"](#)
- [Section 8.4, "Registering a Deal"](#)
- [Section 8.5, "Managing Deal Registrations"](#)
- [Section 8.6, "Deal Registration Statuses"](#)
- [Section 8.7, "Users and Security"](#)

8.1 Overview

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

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

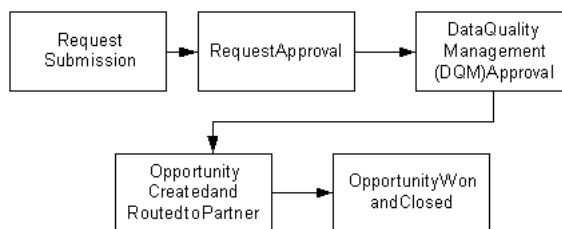
Vendors and partners receive notifications about deal registration activity and can navigate directly from the notification into the associated deal registration. Notifications are configured by the vendor and sent when the status changes, for example, when a deal registration is approved.

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

8.2 Business Flow

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

- [Request Submission](#)
- [Request Approval](#)
- [Data Quality Management \(DQM\) Approval](#)
- [Opportunity Created and Routed to Partner](#)
- [Opportunity Won and Closed](#)

Figure 8–1 Deal Registration to Opportunity Flow

8.2.1 Request Submission

Partners can submit a deal registration online by specifying customer and contact information, product categories, amount, and, any required additional information.

8.2.2 Request Approval

When a request is submitted, Oracle Workflow routes the request to the appropriate vendor approver. Workflow manages the entire approval process and you can configure notifications to be sent as soon as the request is approved, reassigned, or declined for more information. Oracle Workflow is driven by Oracle Approval Management (AME).

For more information on workflow, see the *Oracle Workflow Guide*.

The approval process includes two steps:

- Verify the data
- Check for duplicate records

You can review information entered by the partner. If you are satisfied with the data, you can proceed to the next step and check if there are already duplicates in the system.

If a duplicate deal exists, the approver selects the deal and links it with the deal submitted by the partner. 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. For more information, see [Data Quality Management \(DQM\) Approval](#).

8.2.2.1 Reassign Request

Approvers can reassign requests that are assigned to them for approval, to another vendor user and specify a reason and provide comments. Workflow routes the request to the new approver that is specified. The alternate approver gets notified via notifications that are set up. Once the 'alternate' approver approves the request it continues through the approval workflow process.

8.2.2.2 Decline Request

If the reviewer finds that the information is incomplete or inaccurate or that there is a duplicate, they can decline the deal and provide comments. Workflow notifications are sent to the user. Depending on the setup, the approver is notified too.

8.2.3 Data Quality Management (DQM) Approval

Data Quality Management (DQM) is a tool that is used to check for potential duplicate customer and contacts for a given customer or contact. The system finds potential duplicates using rules defined within DQM.

After the reviewer approves the deal, the deal must go through the DQM approval process before it is actually fully converted into an opportunity.

Duplicate Customers

If a potential duplicate customer exists, the approver selects the existing customer and the system links the selected customer with the deal.

If a duplicate customer does not exist, the approver creates a new customer and the system links the new customer with the deal.

Duplicate Contacts

If a duplicate contact exists, the approver selects the existing contact and the system links the selected contact with the deal.

If a duplicate contact does not exist, a new person with a 'contact' relationship with the specified customer is automatically created by the system.

8.2.4 Opportunity Created and Routed to Partner

If the deal is approved, a new indirect opportunity is generated in the system. Since an opportunity is generated from the deal, the opportunity is routed to the same partner who registered the deal.

8.2.5 Opportunity Won and Closed

When an opportunity is routed to a partner, the partner is notified. The partner can close the opportunity. If the partner cannot close it in the specified time you can re-evaluate the deal and provide the partner some more time to close it.

8.3 Searching for a Deal Registration

You can perform advanced searches based on deal registration 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 deal registrations.

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 channel manager 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 deal registration 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 on behalf of a partner.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Deal Registrations Quick Link > Deal Registration page.
2. Select the desired 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.
4. In the Partner field, select a partner from the partner LOV.

The LOV lists partners that are enrolled in the deal initiative you selected in the previous page.
5. 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.
6. 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.

7. Enter details in the Additional Details region.

8. Enter product categories for the deal in the Products region.

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

9. 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.

10. Enter notes in the Notes region by selecting a note type from the Note Type drop-down list. Select a value from the Status drop-down list to make the note private, internal or public.

You can use notes to store and maintain any extra information/comments while you are creating the deal registration.

11. To save without submitting, click **Save**.

12. To save and submit for approval, click **Submit**.

8.5 Managing Deal Registrations

If you are an approver, you can view deal registrations that are awaiting your approval or that you have already approved or declined. If you are a channel manager, you can view deal registrations submitted by partners you manage. If you are the superuser you can view all deal registrations.

You can view the status of a given deal registrations and manually change the status of a deal registrations if you are a superuser.

You can evaluate a deal registrations and approve or decline it.

8.5.1 Approving a Deal Registration

You can evaluate a deal and approve it.

Use this procedure to approve a deal registration.

Prerequisites

None.

Steps

1. Log in as an approver and navigate to Message Center Link or Deal Registrations Quick Link > Deal Registrations page.

You can approve deal registrations from either of the links mentioned in the previous step. Navigating via the Message Center Link provides you a list of open notifications and you can navigate to a deal registration from here. You can view the notification indicating that a deal is submitted for your approval. Use the steps below to navigate via the Deal Registrations Quick Link.

2. Click the **Action** icon for a deal.

The Deal Registration Details page appears. Review the registration details.

3. Once you decide the data entered by the partner is valid and this is a potential good lead, click **Continue** to review potential duplicates.

The Deal Registration Duplicates page appears. If the system has not found any potential duplicates, the **Approve** button is displayed. You can then directly approve the deal.

4. Review the potential duplicates for the deal submitted by the partner.

The system displays open opportunities and deals on similar customer records and product categories.

5. If you find a duplicate record, select the record and click **Link and Decline** to decline or **Link and Accept** to accept.

6. If the deal is not a duplicate deal, click **Accept**.

If the approver is also the customer approver, the user goes through the customer deduplication process. Otherwise, the next approver is notified. If there is no other approver, the registration is approved. The status changes to 'Pending Customer Dedup' if the system finds potential customer duplicates.

8.5.2 Reassigning or Declining a Deal Registration

You can reassign or decline deals that have been submitted for approval.

Use this procedure to reassign or decline a deal.

Prerequisites

None.

Steps

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

You can view deals that are submitted. By default, you can view deals that require your approval.

2. Click the **Update** icon for a deal.

The Deal Registration Details page appears.

3. You can decline a deal by clicking **Decline**. You can also link the deal to another object and approve or decline it.

4. Click **Reassign** to reassign the deal to another approver.

The Reassign page appears.

5. Select a different country from the Country LOV or select a new approver and click **Apply**.

The list of approvers displays all channel managers.

8.5.3 Using DQM Tools to Deduplicate Customer and Contact Data

Data Quality Management (DQM) is a tool from the trading community architecture (TCA) group that is used to check for potential duplicate customer/contact/address and/or contact points for a given customer/contact/address/contact points attributes.

When a deal registration is created, the customer name, reseller entered by the partner needs to be matched to an existing record in TCA, if any.

- If there are no matches for the customer, reseller (via DQM), a new customer is automatically created by the system.

- If there are no matches for the person specified (via DQM), a new person with a 'contact' relationship with the specified customer is automatically created by the system.
- If there are possible customer matches, the deal status changes to "Pending customer dedup". The DQM approver is notified and can review the matches to review the organization and merge with an existing organization or choose to create a new customer.
- If there are possible person matches, the DQM approver can review the matches and select an existing "contact relationship" in the system or choose to create a new contact.

Use this procedure to check for customer duplicates and ensuring that the opportunity is generated for the right customer.

Prerequisites

A deal in the status 'Pending Customer Dedup' must exist.

Steps

1. Log in as an approver and navigate to Message Center Link or Deal Registrations Quick Link > Deal Registrations page.

You can approve deal registrations from either of the links mentioned in the previous step. Navigating via the Message Center Link provides you a list of open notifications and you can navigate to a deal registration from here.
2. In the Deal Registrations page, click **Continue**.

Potential duplicate customers are displayed.
3. If you find a duplicate, select the record and click **Use Existing Organization**.

If the system finds a duplicate for the contact, choose between **Use Existing Contact** or **Create New Contact**.
4. If you do not find a duplicate customer, click **Create New Organization**.

The system creates a new record using the information entered by the partner in the customer fields. In addition, a new contact is created using information entered by the partner.

8.5.4 Viewing Deal Registrations Log

The deal log tracks the history of the deal registration.

Use this procedure to view the deal log.

Prerequisites

None.

Steps

- 1. Log in as a channel manager and navigate to Deal Registrations Quick Link > Deal Registrations page.
- 2. Click the deal registration hyperlink or click **Update**.
The Deal Registration Details page appears.
- 3. Click the Log tab to view the deal log.

8.6 Deal Registration Statuses

Table 8–1 provides information on different statuses.

You receive notifications that notify the status of the deal at various stages in the deal process.

Table 8–1 Deal Registration Statuses

Technical Name	Status
APPROVED	Deal is approved
APPRVD_PENDNG_CSTMР_DQM	Pending Customer Review
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 deals are restricted by user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view deals that they created. They can also view deals that they have access to, because they are on the partner's channel team. An example of a vendor user is a channel manager who is responsible for managing a set of partners. Another example of a vendor user is a sales representative managing an opportunity generated from a deal.
- Vendor Managers - They are employees in the vendor organization who can view and update all deals within their hierarchy.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.
- Vendor Approvers - They are employees in the vendor organization who can approve deals. After they have performed the approval, they continue to have access to the deal.
- DQM Approvers - They are employees in the vendor organization who can run DQM in order to link customer and contact information on the deal into the master customer record in the system.
- Partner Users - They are employees in the partner organization who can view and update deals they have created and deals where they are identified as the Partner Contact.
- Partner Administrators - They are employees in the partner organization who can view and update all deals owned by their organization.

Permissions

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

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

Special Pricing Management

Oracle Partner Management provides a powerful special pricing function that helps you manage your special pricing activity. 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, "Managing Special Pricing Requests"](#)
- [Section 9.6, "Submitting a Claim"](#)
- [Section 9.7, "Submitting a POS file"](#)
- [Section 9.8, "Special Pricing Request Statuses"](#)
- [Section 9.9, "Claim Statuses"](#)
- [Section 9.10, "Users and Security"](#)

9.1 Overview

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

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

When a partner submits a request, it gets routed to the appropriate approver(s). Approvers are notified of the request, and they review it and approve, reassign, or decline it. When a request is approved and the partner closes the sale, he/she can submit a claim to receive the discount approved. Claims can be submitted manually or in bulk by uploading POS data that includes special pricing authorization information. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, you can make the payment to the partner as a credit memo or can issue a check. Partners can also check the status of claims online.

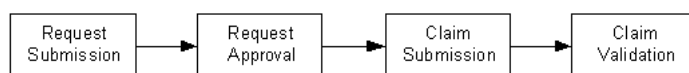
Special Pricing provides search capabilities that enables users to locate requests or claims or perform analysis on special pricing activity. You can configure Oracle Workflow to configure the approval process for incoming requests including any number of levels of approvers.

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

- [Request Submission](#)
- [Request Approval](#)
- [Claims Submission](#)
- [Claim Validation](#)

Figure 9–1 Special Pricing Request to Partner Claim Flow

9.2.1 Request Submission

Oracle Partner Management provides a powerful special pricing function that helps you manage your special pricing activity.

Partners can submit a request by logging into the partner dashboard. Special Pricing supports first tier partners to submit special pricing requests and receive the approved discounted pricing once the request has been approved.

First tier partners are partners that you sell to, directly. Only first tier partners can submit requests and typically they are your direct resellers or distributors that have resellers. Indirect resellers can request special pricing from the distributors that they generally buy from and the distributor will in turn request special pricing from you. (the vendor) Direct resellers will request special pricing directly from you (the vendor) since they are first tier partners.

You can request for special pricing in two scenarios:

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

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

[Table 9–1](#) describes different types of requests.

Table 9–1 Request Types

Request Type	Description	Differences in Data Captured
Meet Competitor Price	Used when a partner wants to match a competitor’s price. The partner can ask you 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 a partner has inventory in his/her warehouse and has not been able to move it. The partner 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 a partner submits a special pricing request, the approver reviews the request and approves, reassigns, or declines the request.

When a request is submitted, Oracle Workflow routes the request to the appropriate vendor approver. Workflow manages the entire approval process and notifications can be configured to be sent as soon as the request is approved, reassigned, or declined. Oracle Workflow is driven by Oracle Approval Management. (AME)

For more information on workflow, see the *Oracle Workflow Guide*.

The approval of a special pricing request includes two approval flows:

- [Special Pricing Request Approval](#)
- [Budget Request Approval](#)

After both requests are approved, the status of the special pricing request changes to ‘Approved.’

Special Pricing Request Approval

When approvers approve, decline or reassign the request, they can add their reasons for doing so. They can provide comments and subsequent approvers can see these comments in the Notes fields. You can set up the security on the comments to enable partners to see the comments or keep it private where only you can view the comments.

The settings are:

1. Public: Other vendor users can see comments.
2. Publish: Partner users and other vendor users can see comments.
3. Private: Only you can see comments.

When the approver reviews a request, they check if it is a similar request, that is, whether the request has already been submitted.

Similar Requests

Special pricing provides approvers with a decision support tool to evaluate similar requests and link similar requests. This tool helps you ensure legal compliance with pricing laws. The system displays similar requests and the approver can review requests and link similar requests. The approval logic is a fuzzy match on end-customer name and an exact match on at least one product.

If a similar request exists, the approver can select the request and link it with the request submitted. The system automatically populates the approved price, minimum quantity, maximum quantity, and end date from the existing request into the request undergoing approval. The approver you can choose to override these values. If a similar request does not exist, you can approve the request.

- If it is a Meet Competitor Quote or Bid Request, you can check if there are requests for the same end-customer deal.
- If it is a Blanket request, you cannot check for similar requests since the request is not for a specific end-customer deal.

Budget Request Approval

Before a special pricing request is approved, a default budget request is generated. If you are the approver, you can source the budget from one or many budgets. There are two options:

- By default, the approver cannot see the budget tab.
- In the other option, the approver can access or edit the Budget tab and change the source of the budget. In this case budget requests are also defaulted for streamlined approval.

You can access budgets via standard budget security within Oracle Trade Management. The system always generates a default budget. In addition, if the approver can see the budget tab then they can edit the budget sourcing. This streamlines the approval process. If the approver specifies the budget sourcing options, the system generates budget requests based on the approver's changes.

You can support scenarios like setting a default budget based on geography (for example, EMEA, AsiaPacific and U.S.) The special pricing request will not be approved until all budget requests are approved.

Approval of budget requests is controlled by Oracle Trade Management. Within Special Pricing, budgets are approved automatically. For more information on setting up and managing budgets, see the *Oracle Trade Management User Guide*.

Data Quality Management (DQM) Approval

After the approver checks for similar requests, the end-customer information of the request will be checked against existing customers in the system.

Data Quality Management (DQM) is a tool that is used to check for potential duplicate customers. The system finds potential duplicates using rules defined within DQM. This provides you with a data cleansing tool to link customers listed on special pricing requests with the master end-customer records. This process can be run at any time.

After the request is approved, the approver can check whether there are duplicate customers or resellers in the system. They can search for all requests that have not had DQM run.

Duplicate Records

If a duplicate record exists, the approver selects the existing end customer or partner record, and the system links the selected record with the special pricing request. If a duplicate record does not exist, the approver creates a new end customer or partner record, and the system links the new record to the special pricing request.

After you create a new end-customer record or link to an existing record, you can link through to the end customer record.

Offers

Offers are generated in the background when approving a special pricing request to track the special pricing discount that has been approved.

If you are an approver who is approving a special pricing request for new inventory, (Ship from Stock check box is not selected) you can select the Offer Type with which you want to approve the special pricing request.

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 the partner will be paid later. If you specify an Accrual Offer type, the partner has 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 the partner off the invoice. If you specify an off-invoice offer type, the partner does not have to submit a claim.

When the partner makes a sale from new inventory, a unique offer number will be generated and displayed in the user interface. 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.

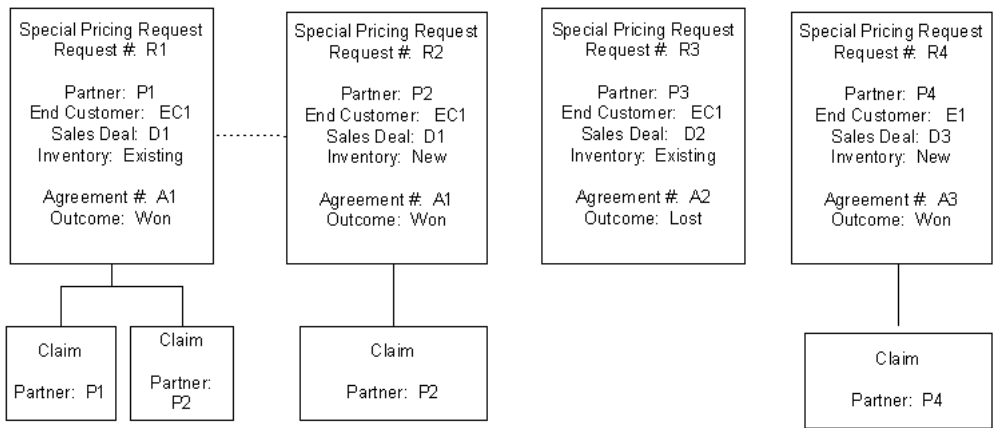
When the partner makes a sale from existing inventory, the offer number is the same as the agreement number displayed in the user interface.

Relationship between Special Pricing Requests and Claims

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

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

Figure 9–2 Relationship between Special Pricing Requests and Claims



Partners can only view requests and claims for their organization.

Special Pricing Liability

The system tracks financial liability via budgets. The liability is the amount of money that you have committed to pay out to your channel partners for discounts but have not yet paid out. The budget(s) being used for special pricing can be reviewed by any user (who has security to see that budget) to understand your liability with respect to special pricing discounts that you have committed and are yet to pay. The liability can be viewed by viewing the 'Earned' column in the special pricing budget(s).

The liability is associated with Oracle General Ledger for safe, conservative accounting. For more information, see the *Oracle Trade Management User Guide*.

For information on how the system calculates and tracks liability, see the *Oracle Partner Management Implementation Guide*.

9.2.2.1 Reassign Request

Approvers can reassign requests that are assigned to them for approval, to another vendor user and specify a reason and provide comments as well. Workflow routes the request to the new approver that is specified. The alternate approver gets notified via notifications that are set up. Once the 'alternate' approver approves the request it continues through the approval workflow process.

9.2.2.2 Decline Request

Approvers can decline a request and provide a reason and comments.

If you are an approver and determine that information is missing, you can decline the request and add a note clarifying what information is missing. The partner can provide information that is missing and resubmit the request. When a partner resubmits the request after providing additional information, the request is routed to the first level approver and continues through the approval process.

9.2.3 Claims Submission

When a request is approved, partners can close the sale at the discounted price. They can use the discount amount to complete the sale for which they needed the discount. After a sale is completed at the discounted price, partners can submit a claim to collect payment. You can link the request to the claim and present a summary of the request on the claim to streamline claim submission.

While submitting the claim, they can provide details of the sale. Partners can understand the status of a claim by logging on to the partner dashboard to check claim status or the claims person can send them an e-mail.

Partners can submit claims either manually, online or in bulk using a Point of Sale (POS) file. Point of Sale data is channel sales data that partners submit to you. You can ask partners to submit POS data to you so that you have better visibility into their product sales in the channel. If they submit a POS file, they must include special pricing authorization information in the POS file. Each POS file will have a type of either 'Chargeback' or 'Special Pricing'. If the POS file is of type 'Special Pricing', claims are automatically generated from the claim data included within the POS file. The system will link the claim to the appropriate special pricing request and send it through the claims validation process.

For information on ChargeBack, see the *Oracle Trade Management User Guide*.

For information on submitting special pricing claims information within a POS file, see [Submitting a POS file](#).

9.2.4 Claim Validation

When you submit a claim, the status of the claim is 'Open'. (In Oracle Trade Management) 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. The

payment method is based on the profile (of the partner) set in Oracle Trade Management. After the approver approves the claim, the system initiates payment.

Note: The claim validation and claim payment features are handled by Oracle Trade Management.

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

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 that you want 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 channel manager 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 on behalf of a partner.

Prerequisites

None.

Steps

1. Log in as a channel manager 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 the records using .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Create**.

When a partner submits a request, the name of the partner is populated in the Distributor field.

3. In the Create Special Pricing Request page, 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 the partner has not been able to move inventory from his/her warehouse.

4. Select the Ship from Stock check box if the partner is going to fulfill the special pricing deal with products from their existing inventory.

If the partner is 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 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 that you want.
- 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 Managing Special Pricing Requests

You can view special pricing requests and notifications that are awaiting your approval. You can evaluate a request and approve or decline it.

9.5.1 Approving or Declining or Reassigning a Special Pricing Request

Once the approver is notified of a request, he/she reviews the information on the request and either approves or declines the request.

Use this procedure to approve or decline a special pricing request.

Prerequisites

A special pricing request has been submitted.

Steps

1. Log in as an approver and navigate to the Message Center Link or Special Pricing Requests Quick Link > Special Pricing Requests page.

You can approve requests from either of the links mentioned. Navigating via the Message Center Link will provide you a list of open notifications and you can link in to a request from here. Use the steps below to navigate via the Special Pricing Request Quick Link.

2. Select a request in the Pending Approval status and click the **Update** icon.

The Special Pricing Request: Details page appears and you can review information. You can decline, reassign, make changes and save or continue through the approval process.

You can view the Budgets tab if you are an approver. The system automatically populates a budget request for the total discount. The approver can change the budget sourcing if they wish.

- Click **Decline** to decline the request.

You can decline a request and provide a reason and add a note. Additionally, if the request is missing information you can decline the request. The partner can provide information that is missing and resubmit the request. When a partner resubmits the request after providing additional information, the request is routed to the first level approver and continues through the approval process.

- Click **Reassign** to reassign the request to another approver.

You can reassign requests to another vendor user by selecting a new approver. Workflow routes the request to the new approver. The new approver gets notified via notifications that are set up. Once the new approver approves the request, it continues through the approval workflow process.

3. Click **Continue** to access the decision support tool that will help you ensure similar discounted pricing for all special pricing requests for the same end customer sales deal. In the United States, this decision support tool helps you ensure legal compliance with special pricing laws.

The Approve Request: Evaluate Similar Requests page appears.

At this point, the system intelligently tracks special pricing liability which is the total discount that you may have to pay out to channel partners you have approved special pricing requests for, and automatically ties this liability into Oracle General Ledger for safe, conservative accounting.

4. In the Similar Requests region, review if there are similar special pricing requests for the same end customer sales deal.
5. If a similar request exists, select the request and click **Link Request**.

If a similar request does not exist, the approver does not link any requests and continues through the approval process.

6. Click **Approve** to approve the request.

The Approve Request: Pricing page appears.

7. If the request is from new inventory, you can see the Offer Type field.

The values are: Accrual and Off-Invoice. If you specify an Accrual Offer type, the partner has to submit a claim. If you specify an off-invoice offer type, the partner does not have to submit a claim.

8. Enter details in the Approved Type, Approved Amount, Maximum Quantity and Minimum Quantity fields.

If you have linked similar requests, the system automatically populates the approved price, minimum and maximum quantities, and the end date from the existing request into the request undergoing approval.

9. Click **Apply** to confirm.

9.5.2 Using DQM Tools to Deduplicate Customer Data

DQM approval is not required to happen during the approval of a special pricing request. It can happen at any time during or after approval of the special pricing request. The DQM approver can complete the DQM process by linking into the Special Pricing Requests area and performing a search on all requests that have not had a DQM run. The DQM approver can choose to create a new end customer or reseller party or use an existing party.

When a request is created, the end customer name and reseller name entered can be matched to an existing record in TCA.

If a duplicate record exists, the approver selects the existing end customer or partner record, and the system links the selected record with the special pricing request. If a duplicate record does not exist, the approver creates a new end customer or partner record, and the system links the new record to the special pricing request.

Use this procedure to check for existing end customer or reseller records in TCA and to link the special pricing request to an existing TCA record or create a new one.

Prerequisites

None.

Steps

1. Log in as the DQM Approver and navigate to the Message Center Link or Special Pricing Requests Quick Link > Special Pricing Requests page.

You can approve requests from either of the links mentioned. Navigating via the Message Center Link will provide you a list of open notifications and you can link in to a request from here. Use the steps below to navigate via the Special Pricing Request Quick Link.

To be a DQM approver, you need to have the appropriate permission.

2. Select a request where the value in the 'Customer Data Merged' column is No and click the **Update** icon.

The Special Pricing Request: Details page appears and you can review information.

3. Click **Continue**.

Potential duplicate records are displayed.

4. In the End Customer region, select a record and click **Merge**.
5. If you find a duplicate end customer or reseller, click **Use Existing Organization**.

If you do not find a duplicate end customer or reseller, click **Create New Organization**. The system creates a new record using the information that you enter in the customer fields.

9.6 Submitting a Claim

On behalf of partners, 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.

Partners may manually send you the claim information, and you can submit the claim on their behalf.

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

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 channel manager and navigate to Special Pricing Requests 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. While viewing the request, you can view a summary list of all claims submitted for that request and link through to them.

3. In the Create Claim page, select a name from the Pay to LOV. The Claim Type field displays the default claim type for Special Pricing.

The Pay to field is automatically populated with the name of the organization who is submitting the claim.

4. Select a value from the Payment Method LOV.

The payment methods are credit memo or check. The payment method gets defaulted from autopay.

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.

9.7 Submitting a POS file

Partners can submit claims in bulk using a Point of Sale (POS) file. Point of Sale data is channel sales data that partners submit to you. You can ask partners to submit POS data to you so that you have better visibility into their product sales in the channel. POS data lines include fields like: Product Number (SKU), Product Name, Quantity, Distributor, Reseller, Acquisition Cost, and so on. You may receive POS data from the partner on a periodic basis.

You can use the information in the POS data feed to validate the sale and automatically create a claim and generate payment to the partner.

For the system to validate the end customer name, you must run DQM. If DQM has not been run for a request and a claim comes in through the POS data for that request, it is necessary that you run DQM for validation on end customer name. For more information, see [Using DQM Tools to Deduplicate Customer Data](#).

A POS file can be submitted in one of the following ways:

- Flat Files (.csv files) - You can submit the POS file in the form of .csv files. You can import these files into Oracle Trade Management by using the upload tool provided by Oracle WebADI. For more information, see the *Oracle Trade Management User Guide*.
- Paper documents - You can submit the POS file in the form of paper documents such as paper receipts. You can convert these paper documents into electronic format and upload the data by using the upload tool provided by Oracle WebADI.
- EDI or XML - You can submit the POS file as an electronic file.

The POS file can be of type 'Chargeback' or 'Special Pricing'. If the POS file is of type 'Special Pricing', claims are generated for each POS line pertaining to the same special pricing request.

Use this procedure to import a POS file through Oracle WebADI.

Prerequisites

None.

Steps

1. Log into Oracle Trade Management and navigate to Indirect Sales Management > Chargeback.
2. Click **Import Batch** to navigate to the Select Layout Page in the Oracle WebADI Application.
3. Select Trade Management: Resale Layout from the Layout drop-down list and click **Next**.

You can also select Trade Management: Resale Text Layout to enter text that can be used when data is sent from Third Party Application and requires external values to internal values conversions.

4. Click **Next** to navigate to the Select Content Page.
5. Select Download to update a batch or select None if you want to enter data manually or select Text file. When Text File is selected, data from the text file is imported as an Excel Sheet.
6. Click **Next**, to navigate to the Select Mapping Page.
 - If you select 'Download' as content, enter the batch number for the batch that has to be downloaded.
 - If you select 'Trade Management: Resale Layout', select 'Download' mapping.
 - If you select 'Trade Management: Resale Text Layout', select 'Download Text Map' mapping.
 - If you select 'None', select Mapping Page is skipped.

If you select 'Text File' as content, for the 'Select Text files' section:

- a. Select Text file from the local directory that has the data to upload into Oracle Application Indirect Sales Management Interface Tables.

- b. Select one of the 'Delimiter' that is used in the Text file.
- c. Enter the number for the line where the actual data starts, skip the line that has the header. For example, if the header is at line 1 and data starts from line 2, enter 2 in the 'Start Importing at Line Number' field.

If you select 'Text File' as content, for the 'Select Mapping' section:

- a. If you select 'Trade Management: Resale Layout', select 'Text File Map' mapping.
- b. If you select 'Trade Management: Resale Text Layout', select 'Text Entry Map' mapping.

7. Click **Next** to navigate to the Document Creation Review Page.

8. Review the entries and click **Create Document**.

An excel sheet is created and populated with data when 'Download' and 'Text File' content are selected.

9. If you select 'Download' content, update the data.

10. If you select 'None', enter data in the excel sheet.

11. Once data is entered, updated or downloaded from the text file in the excel sheet, select 'Oracle' from the menu and select 'Upload'.

A status monitor page appears with 'Upload' and 'Cancel' buttons.

12. Click **Upload**.

The status appears on the page indicating the upload status and importer status.

The importer validates data uploaded into Oracle Application Interface Tables.

For more information, see the *Oracle Trade Management User Guide*.

9.8 Special Pricing Request Statuses

[Table 9-2](#) provides information on special pricing request statuses. You can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of.

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.
Closed	The date is greater than the waiting period specified in the Grade Period system profile. The Grace Period profile controls how long 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.

9.9 Claim Statuses

Table 9–3 describes various claim statuses.

Table 9–3 Claim Statuses

Claim Status	Description
New	The claim has been submitted.
Open	The claimed amount has not yet been paid to the partner.
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 the partner.

9.10 Users and Security

Access to requests are restricted by user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view special pricing requests that they created. They can also view requests that they have access to, because they are on the partner's channel team. An example of a vendor user is a channel manager who is responsible for managing a set of partners.
- Vendor Managers - They are employees in the vendor organization who can view, update, approve and perform DQM on all special pricing requests.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.
- Vendor Approvers - They are employees in the vendor organization who can approve special pricing requests. After they have performed the approval, they continue to have access to the special pricing request.
- DQM Approvers - They are employees in the vendor organization who can run DQM in order to link end customer or reseller information on the special pricing request into the master customer or partner record in the system.
- 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.

Permissions

- Super User Permission - ['OZF_SPECIAL_PRICING_SUPERUSER'] - Allows a vendor user to view, update, approve and perform DQM on all special pricing requests. Also allows a vendor user to edit the End Date of a special pricing request. Allows a partner user to view and update all special pricing requests owned by their organization.
- DQM Permission - ['OZF_SPECIAL_PRICING_DQM'] - Allows a vendor user to view, update and perform DQM on all special pricing requests.

Partner Funds Management

Partner Funds Management enables you to streamline the process of distributing and managing marketing funds you share with your channel partners

Sections in this chapter include:

- [Section 10.1, "Overview"](#)
- [Section 10.2, "Business Flow"](#)
- [Section 10.3, "Searching for a Fund Request"](#)
- [Section 10.4, "Submitting a Fund Request"](#)
- [Section 10.5, "Managing Fund Requests"](#)
- [Section 10.6, "Submitting a Claim"](#)
- [Section 10.7, "Fund Request Statuses"](#)
- [Section 10.8, "Claim Statuses"](#)
- [Section 10.9, "Users and Security"](#)

10.1 Overview

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

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

Partner Funds Management provides search capabilities that enable you to locate requests or perform analysis on marketing activity. You can configure Oracle Workflow to control the approval process for incoming requests, which can include any number of levels of approvers.

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

10.2 Business Flow

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

- [Request Submission](#)
- [Request Approval](#)

- [Claims Submission](#)
- [Claims Validation](#)

Figure 10–1 Fund Request to Partner Claim Flow



10.2.1 Request Submission

You can set up a program benefit that enables partner users enrolled in that program to request channel marketing funds. Partner users can enter their expected performance when submitting a fund request and their actual performance when submitting a claim. For example, they may expect to generate 100 qualified leads with a particular mass mailing activity and when they submit a claim for that activity, they would specify how many leads were actually generated.

Partner users can select the marketing activity for which they want to receive funding and this selection drives items that will appear in the Expense Breakdown region. You can also capture the expected performance which is the outcome that is expected for an activity. For example, leads that are generated or revenue that is expected. The actual amount will be captured during the claim submission.

10.2.2 Request Approval

When a partner user applies for funds to execute marketing activities, the approver reviews the request and approves, reassigns, declines or returns the request.

When a request is submitted, Oracle Workflow routes the request to the appropriate vendor approver. Workflow manages the entire approval process and notifications can be configured to be sent as soon as the request is approved, reassigned, declined or returned for more information. Oracle Workflow is driven by Oracle Approval Management. (AME)

For more information on workflow, see the *Oracle Workflow Guide*.

The approval of a fund request includes two approval flows:

- [Fund Request Approval](#)
- [Budget Request Approval](#)

Fund Request Approval

The first level approver of the fund request approves, reassigns, declines, or returns the request, asking the partner user to provide additional information to be able to approve the request. Partner users can upload the marketing collateral and enter any additional information for the activity. They can then resubmit the request. When the first level approver approves the request, it is sent to the next level approver.

When the approver reviews a request, he/she reviews the request to determine if the requested amount can be funded and decides whether to approve or decline the request. He/she can specify what budget(s) to request the funds from.

When an approver approves, declines or reassigns a request, he/she can add a reason and provide comments and subsequent approvers can see these comments in the Notes fields. You can set up the security on the comments to enable partner users to see comments or keep it private where only you can view the comments.

The settings are:

1. Public: Other vendor users can see comments.
2. Publish: Partner users and other vendor users can see comments.
3. Private: Only you can see comments.

Budget Request Approval

Once a fund request has gone through all the fund request approvers, budget requests are routed to the appropriate budget request approvers. (as defined in the approval process associated with the fund)

Before a fund request is approved, a default budget request is generated. As an approver, you can also drill into the budget tab and change the budget sourcing. If you are the approver, you can source the budget from one or many budgets. You can access budgets via standard budget security with Oracle Trade Management.

The default budget(s) is defined while creating the benefit. Approval of a budget request is configured in Oracle Trade Management. The budgets can be approved manually or automatically. If the Auto-approval feature is set in Oracle Trade Management, budgets can be approved automatically.

For more information on setting up and managing budgets, see the *Oracle Trade Management User Guide*.

You can set up different notifications per benefit. The application supports sending notifications about the fund request activity like submission of a request, approval of a request and so on.

The budget request approval rules are set up in Oracle Marketing. For information on setting up approval rules, see *Oracle Marketing Implementation Guide*.

Partner Funds Liability

The system tracks financial liability via budgets. The liability is the amount of money that you have committed to pay out to your channel partners for marketing activities but have not yet paid out. The budget(s) being used for fund requests can be reviewed by any user (who has permission to view that budget) to understand your liability with respect to payments that you have committed and are yet to pay. The liability is displayed in the 'Earned' column in the user interface for the budgets being used for channel marketing funds.

The liability is associated with Oracle General Ledger for safe, conservative accounting. For more information, see the *Oracle Trade Management User Guide*.

For information on how the system calculates and tracks liability, see the *Oracle Partner Management Implementation Guide*.

10.2.2.1 Reassign Request

Approvers can reassign requests that are assigned to them for approval, to another vendor user and specify a reason and provide comments. Workflow routes the request to the new approver. The alternate approver gets notified via notifications. Once the alternate approver approves the request, it continues through the approval workflow process.

10.2.2.2 Return Request

Approvers can return the request. For example, they could return a request if they want the partner user to submit any collateral related to the marketing activity before approval. You can configure the return reasons.

After the partner user puts the collateral together he/she resubmits the request to the first level approver and attaches the collateral or mails or faxes the collateral. 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 first level approver. Once the first level approver approves the request, it is sent to the next level approver and continues through the approval process.

10.2.2.3 Decline Request

Approvers can decline a request and provide a reason and their comments.

10.2.3 Claims Submission

After a request is approved and the partner user has executed the planned marketing activity, he/she can submit a claim to redeem money from you. You can link the request to the claim and present a summary of the request on the claim activity to streamline claim submission. You can also view a summarized view of the request and view the amount that was approved, the amount that has been claimed so far, and the outstanding amount that the partner user can claim.

The system captures expected performance on the request and the actual performance on the claim, which helps you to analyze the success of marketing expenditures.

Partners can check the status of a claim by logging on to the partner dashboard.

10.2.4 Claims Validation

When you submit a claim, the status of the claim is 'Open'. (in Oracle Trade Management) 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. The payment method is based on the profile (of the partner user) set in Oracle Trade Management. After the approver approves the claim, the system initiates payment.

Note: The claim validation and claim payment features are handled by Oracle Trade Management.

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

10.3 Searching for a Fund Request

You can search for fund requests to view fund 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 channel manager 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 on behalf of a partner user.

Prerequisites

None.

Steps

1. Log in as a channel manager and navigate to Fund Request Quick Link > Fund 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 the records using .CSV format. You can open the file using Microsoft Excel or other spreadsheet or database programs.

2. Click **Create.**

The Create Fund Request page appears. The status and request number of the request will be automatically populated and the status of the request will be 'Draft'.

3. Select a partner from the Partner LOV.

This is the partner for whom you are submitting a fund request.

For a partner user, the name of the company will be automatically populated in the Partner field.

4. Select a requestor's name from the Requestor LOV.

This is the partner contact for the fund request.

For partner users, the name will be automatically populated in the Requestor's Name field, and they can change the name to another person in their organization.

5. Select a benefit from the Benefit LOV.

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

6. Select a marketing activity from the Activity LOV.

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

7. 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.

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

9. 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.

10. Enter the partner user's contribution towards the marketing activity in the Partner Contribution field and click **Next to proceed.**

A partner's contribution is how much the partner's company will contribute towards the marketing activity.

11. 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 the partner user's contribution, for example, you may only fund 50% of the total amount. The line items appearing within the Expense Breakdown are based on the Activity you selected.

12. Enter the requested amount at the expense breakdown level and the total amount, which includes the partner contribution, for each expense item.

For example, if a partner has requested for \$1000 and his/her contribution is \$200, the 'Total' amount of the fund request is \$1200. In the Expense Breakdown region, if the partner selects the activity 'Advertising', he/she can specify the request amount as \$600 for banners and \$400 for posters.

13. Enter details in the Performance Objectives region.

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

14. Enter details in the Products region.

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

15. Enter details in the Geography region.

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

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

The Preview Submission page appears.

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

10.5 Managing Fund Requests

You can view fund requests and notifications that are awaiting your approval. You can evaluate a request and approve or decline it.

10.5.1 Approving or Declining or Reassigning or Returning a Fund Request

Use this procedure to approve, decline, or reassign a request.

Prerequisites

A fund request has been submitted.

Steps

1. Log in as a channel manager and navigate to Message Center Link or Fund Request Quick Link > Fund Requests Summary page.

You can approve requests from either of the links mentioned. Navigating via the Message Center Link will provide you a list of open notifications and you can link in to a request from here. Use the steps below to navigate via the Fund Request Quick Link.

You can view the Budget tab if you are an approver. The system automatically populates a budget request with the default budget. The approver can change the budget sourcing.

2. Select a request in the Pending Approval status and click the **Update** icon.

The Fund Request Approval page appears and you can review the information. You can decline, reassign, and return the request or continue through the approval process.

- Click **Decline** to decline the request.

In the Decline Fund Request page, select a decline reason from the LOV and enter comments for declining the request. The partner user can view this information and take necessary action.

- Click **Reassign** to reassign the request to another approver.

You can reassign requests to another vendor user by selecting a new approver. Oracle Workflow routes the request to the new approver. The alternate approver gets notified via notifications that are set up. Once the alternate approver approves the request, it continues through the approval workflow process.

- Click **Return** to return the request.

In the Return Request page, select a return reason and enter comments for returning the request. The partner user can view this information and take necessary action. For example, you can return the request because information necessary for approval is missing or because you would like

the partner to submit the marketing collateral before you approve the request.

3. Review details and click **Continue**.

4. Click **Approve** to approve the request.

The Request Approval page appears.

5. Enter the amount that you will be approving in the Approval Information region and add your comments if any.

For example, if the regular price is \$100, discount type is 'percentage', amount is \$10 and you have approved 5% instead of 10%, the approved amount is \$95.

6. Click **Confirm** to confirm the approval.

10.6 Submitting a Claim

After the approval of the fund request, the partner user executes the marketing activity. The partner user (or channel manager on behalf of the partner user) can submit a claim to redeem money from you. This starts the claims approval flow in Oracle Trade Management in which the claims approver verifies the claim information and approves or declines the claim.

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

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 channel manager and navigate to Fund Requests Quick Link > Fund Requests 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 the partner user's organization. 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 that a partner has 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 you 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.

10.7 Fund Request Statuses

Table 10–1 provides information on different statuses. You can configure notifications to be sent based on any status change, so that all users are immediately notified via e-mail of any activity they should be aware of.

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.

Table 10–1 Fund Request Statuses

Status	Description
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.
Closed	The fund request is closed. The Grace Period profile controls how long 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.
Void	The fund request has been made void by a vendor superuser in the vendor organization. System changes the status to 'Canceled' if a superuser voids the request when it is invalid.

10.8 Claim Statuses

Table 10–2 describes various 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 the partner user.
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 the partner user.

10.9 Users and Security

Access to requests is controlled based on user types and permissions.

User Types

- Vendor Users - They are employees in the vendor organization who can view fund requests that they created. They can also view requests that they have access to, because they are on the partner's channel team. An example of a vendor user is a channel manager who is responsible for managing a set of partner users.
- Vendor Managers - They are employees in the vendor organization who can view, update, and approve all fund requests.
- Vendor Administrators - They are employees in the vendor organization who can perform system setup activities.
- Vendor Approvers - They are employees in the vendor organization who can approve fund requests. After they have performed the approval, they continue to have access to the fund request.
- 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.

Permissions

- Super User Permission - ['OZF_FUND_REQUEST_SUPERUSER'] - Allows a vendor user to view, update, and approve all fund requests.

Glossary

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

Assignment

When an opportunity is matched to partners.

Assignment Routing

Process that routes an opportunity assignment to partners.

Attribute

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

Benefit

Oracle Partner Management extends benefits to partners based on their program participation.

Campaign

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

Channel Administrator

They have access to administrative setups to define profile attributes, program benefits such as referral and deal registration initiatives as well as setups, notifications and partner users accounts.

Channel Manager

They own the relationship between the vendor and the partner and bear responsibility for managing and distributing information to partners. They work with the partner, assign and maintain opportunities, approve assignments, approve submitted referrals, special pricing requests, fund requests, and deals. Depending upon business rules, they may approve or reject opportunities being assigned to partners. They can maintain opportunities depending upon access and business rules.

Channel Manager Dashboard

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

Channel Manager Timeout

This is the date by which all channel managers must approve or deny the opportunity assignment.

Customer

A purchaser of products or services.

Compensation

If a partner's referral results in orders in the system, they have to be compensated for the same. The compensation rates vary from initiative to initiative and by product. Once a partner is compensated, the referral is closed.

Concurrent Manager

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

Deal Registration

When a partner resells your products, there is often a conflict between your direct sales force and your partner network. Deal Registration enables partners to submit opportunities and receive your commitment not to compete directly and support the partner on the deal.

Distributor

A business that buys, warehouses, ships, invoices and resells; a party that acts as an intermediary in order and inventory management.

DQM

Data Quality Management (DQM) is a tool that is used to check for potential duplicate customers, contacts, address and/or contact points for a given customer, contact, address or a contact. The system finds potential duplicates using rules defined within DQM.

Enrollment

Enrollments enables you to administer and expedite the registration of partners into Oracle Partner Management by enrolling them into programs.

Existing Inventory

When a partner has already bought the product and wants a discount for past purchases.

Expense Breakdown

This is the breakdown of expenses for the marketing activity. The line items appearing within the Expense Breakdown are based on the Activity you selected.

Fund Request

The request a partner submits (or a vendor on behalf of a partner) in order to request soft fund dollars from you.

Fund Request Claim

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

Hyperlink

A link to another page.

Indirect Managed Partner/IMP

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

Joint Selling

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

Joint Assignment

This routing option supports collaborative selling. The opportunity is offered to multiple partners for fulfillment. The partners come together and bring their expertise to win the deal.

Managed Partner

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

Manufacturer

A business or person that produces one or more products. (also known as vendor)

Marketing Activity (Partner Fund)

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

Membership Level

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

Multiple-Parallel

In this routing option, you can also broadcast the opportunity to multiple partners for review at the same time. However, only the partner who accepts it first, will win the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner LOV window.

Multiple Serial

This is a variation of the single routing option and you can create an ordered list of partners. The opportunity will be offered to the first partner for review. If the partner accepts it, the assignment is successful. If the partner declines it, it is offered

to the second partner in the list for review. You need to select at least two partners from the partner LOV window.

New Inventory

When a partner requests a special price for a new purchase and you approve it, the partner can close the sale to the end-customer at a discounted rate.

Note Status

There are three statuses available for notes:

- Public: Other vendor users can see comments.
- Publish: Partner users and other vendor users can see comments.
- Private: Only you can see comments.

Offer

Offers are generated in the background when approving a special pricing request to track the special pricing discount that has been approved. There are three types of offers:

- Accrual Offer - The discounted amount will be accrued and the partner will be paid later.
- Off-Invoice Offer - The discounted amount will be paid to the partner off the invoice.
- Scan Data Offer - If the special pricing request is being fulfilled from existing inventory, the system will generate a Scan Data offer.

Opportunity

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

Partner

Partners are people or organizations with whom you can have a business relationship. Every partner organization is a distinct legal entity with its own challenges, market pressures, customer pressures, and intellectual capital.

Partner Administrator

The partner administrator is the primary contact of the organization and is responsible for administering all opportunities assigned to the partner.

Partner Contact

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

Partner Dashboard

The partner dashboard enables partners to enroll into programs, manage memberships, view and manage company profile, manage users, view product catalog, place orders, view order status, submit referrals, register deals, request funds, request discounts, accept opportunities, and work on assigned opportunities.

Partner Fund

Partner funds enable you to better manage and distribute channel marketing funds to your channel partners. You can provide funds for a specific time period and base it on fiscal periods of your organization.

Partner Funds Liability

The liability is the amount of money that you have committed to pay out to your channel partners for marketing activities but have not yet paid out.

Partner List

Oracle Partner Management integrates with Oracle Marketing to enable you to generate partner lists. These lists can then be used to run marketing campaigns for partners. Based on profile attributes, you can create a list and save your search. Based on the search criteria, partners will be displayed and this can be created as a list.

Partner Timeout Period

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

Partner Type

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

Partner User

They can use the transactional system and request for a special price, request for funds, submit referrals, and register deals. They can also request for an account via self-service and these requests will be routed to partner administrators for approval. They can manage a user's profile, preferences, view their company profile, manage objects that they have access to and can also purchase things from the store.

Personalize

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

Program

Programs are used to segment partners and provide different benefits to partners.

Program Benefit

Programs are used to segment partners and provide different benefits to partners. Partners enrolled in programs can enjoy special benefits like leads, opportunities, marketing development funds, referrals, deals, and special pricing.

Prospect

Prospective customers who have not previously purchased products or services.

Record

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

Referral

Partners can submit referrals and receive a commission for referring the business. Partners can refer business opportunities that they cannot fulfill directly. For example, the customer is interested in a product that the reseller does not resale. The partner can then submit a referral and receive a percentage of the revenue generated.

Reseller

A business that buys goods from a manufacturer and resells them to customers unchanged.

Similar Special Pricing Request

Special pricing provides approval with a decision support tool to compare similar requests and link similar requests. This mechanism ensures legal compliance with U.S. pricing laws. It essentially enables you to ensure similar pricing. Regardless of your geography, it enables you to ensure the same or similar pricing for all special pricing requests for a particular end-customer deal.

Special Pricing

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

Special Pricing Claim

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

Special Pricing Request

A special pricing request enables partners to request discounted pricing from you. They can request discounts on competitive sales deals, specific end-customer deals, and on inventory that they have not been able to move.

Special Pricing Request Type

The request types are:

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

Special Pricing Liability

The liability is the amount of money that you have committed to pay out to your channel partners for discounts but have not yet paid out.

Status

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

Structured Query Language (SQL)

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

Single Assignment

In this routing option, the opportunity is routed only to one partner.

Summary Page

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

Tab

Main divisions within the user interface of Oracle Partners.

TAP

Territory Assignment Program. This is a CRM common module that enables businesses to allocate resources based on territory definitions.

TCA or Trading Community Architecture

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

Workflow

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

- a PL/SQL stored procedure or an external function
- a notification to a user or role that they may request a response
- a business event

- a subflow that itself is made up of many activities.

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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