

Oracle® Partner Management

Implementation Guide

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Oracle Partner Management Implementation Guide, Release 11i

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Preface

Intended Audience

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

This guide is intended for members of the vendor organization who are responsible for implementing and administering the Oracle Partner Management application.

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

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

How To Use This Guide

The Oracle Partner Management Implementation Guide contains the information you need to implement and administer the Oracle Partner Management application. The guide contains the following chapters:

- Chapter 1 provides a brief introduction to Oracle Partner Management and highlights the key features of the application.
- Chapter 2 provides an overview of other Oracle applications that must be installed and implemented before you can implement Oracle Partner Management. The chapter also describes the applications with which Oracle Partner Management integrates.
- Chapter 3 describes implementation and administration tasks that you might need to perform for multiple Oracle Partner Management business flows.
- Chapter 4 describes how to create vendor users and then assign responsibilities, roles, and permissions.
- Chapter 5 describes partner profile attributes and explains how to set up and administer seeded profile attributes and create customized attributes.
- Chapter 6 explains how to set up the partner dashboard and create partner organizations and partner users.
- Chapter 7 explains how to set up and maintain the channel manager dashboard.

- Chapter 8 explains how to set up the various features of partner programs.
- Chapter 9 explains how to set up the various features that are used in the partner program enrollment process.
- Chapter 10 describes the opportunity routing process and describes how to create opportunity matching rules. It also describes how to set up and administer other opportunity management features, such as opportunity-related notifications, channel types, and timeout periods.
- Chapter 11 explains how to set up and perform on-going administration for opportunity and lead referral benefits.
- Chapter 12 explains how to set up and perform on-going administration for deal registration benefits.
- Chapter 13 explains how to set up and perform on-going administration for special pricing benefits.
- Chapter 14 explains how to set up and perform on-going administration for partner marketing fund benefits.
- Chapter 15 explains how to set up the partner locator, which allows potential customers to use a variety of criteria to locate a partner that sells the vendor's products.
- Chapter 16 describes the process for integrating Oracle Partner Management with Oracle Sales. This chapter applies to integration with Oracle Sales Patchset B specifically.

See Related Documents on page xvii for more Oracle Applications product information.

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Structure

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Related Documents

You can choose from many sources of information to increase your knowledge and understanding of Oracle Partner Management. When you are referred to other Oracle Applications documentation, make sure to use the Release 11*i* versions only.

Online Documentation

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

- **PDF Documentation:** A Documentation CD is provided with each release. Refer to this for current documentation for Oracle Applications products. The Documentation CD is also available from Oracle*MetaLink* and is updated frequently.
- **Online Help:** You can refer to Oracle iHelp for HTML-based online help for Oracle Partner Management. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation.

Accessing Additional Guides

Oracle Partner Management shares business and set up information with other Oracle Applications products. Therefore, you might 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.

Printed guides can be purchased from the Oracle Store at <http://oraclestore.oracle.com>.

Guides Related to All Oracle Products

Oracle Applications User's Guide

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

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

Guides Related to This Product

Oracle Sales Implementation Guide

This guide describes how to set up and administer the Oracle Sales application. Oracle Sales is used to manage an organization's direct sales channel. It is used to create and manage leads and opportunities, customers and customer contacts, and sales campaigns.

Oracle Approvals Management Implementation Guide

Oracle Approvals Management is used to create and maintain approval rules and approvers. Oracle Partner Management uses Oracle Approvals Management to manage the approval process for deal registration, lead and opportunity referrals, partner funds, partner program enrollments, and special pricing.

Oracle iStore Implementation Guide

This guide provides complete information on creating web sites based on the iStore framework. Oracle Partner Management uses Oracle iStore to create the partner dashboard and enrollment requests flows.

Oracle Marketing Implementation Guide

Oracle Partner Management integrates with Oracle Marketing to allow a vendor to create marketing campaigns targeted toward partners. Refer to this guide for information on setting up marketing campaigns.

Oracle Trade Management Implementation Guide

Oracle Partner Management integrates with Oracle Trade Management for budgets, claims, and offers associated with partner funds, special pricing requests, and opportunity and lead referrals. Refer to this guide for complete information on creating budgets, claims, and offers.

Oracle Content Management Implementation Guide

Oracle Content Manager is used as an information repository for information that appears on the partner dashboard and to store information associated with partner programs. Refer to this guide for complete information on setting up and administering a content repository.

Oracle Advanced Pricing Implementation Guide

Oracle Advanced Pricing is used to set up price lists and manage pricing for partner programs. Refer to this guide for complete information on creating price lists that calculate taxes, track customer discounts, and perform currency conversion.

Oracle Contract Management Implementation Guide

Oracle Partner Management integrates with Oracle Contract Management to provide legal terms and conditions associated with partner programs. Refer to this guide for complete information on creating and administering contracts and contract templates.

Oracle Trading Community Architecture Data Quality Management User Guide

Oracle Partner Management integrates with Oracle Data Quality Management to check for duplicate customers, contacts, opportunities, and leads.

Oracle iPayment Implementation Guide

Oracle Partner Management integrates with Oracle iPayment to enable partners to pay for partner program enrollment using electronic payment methods. Refer to this guide for information on setting up the iPayment server.

Oracle Order Management

Oracle Order Management allows you to efficiently capture customer orders from multiple sales channels and fulfill the orders. Oracle Partner Management integrates with Oracle Order Management to process partner program enrollments, to fulfill special pricing requests, and to provide data that appears on the channel manager dashboard.

Oracle Quoting Implementation Guide

Oracle Partner Management integrates with Oracle Quoting to allow partners to create quotes for opportunities. Refer to this guide for information on setting up and maintaining the quoting mechanism.

Oracle Workflow Builder Implementation Guide

Oracle Partner Management integrates with Oracle Workflow Builder to provide notifications and notification flows for deal registrations, referrals, partner funds, partner programs, and special pricing. Refer to this guide for information on creating new notification flows, messages, and other notification-related tasks.

Oracle Territory Manager Implementation Guide

Oracle Partner Management integrates with Oracle Territory Manager to create channel teams and territories related to deal registration and referrals.

Oracle Common Application Components Implementation Guide

Oracle Partner Management uses many of the components provided by Oracle Common Application Components, including Notes, the Resource Manager, and the Task Manager. Refer to this guide to make sure that these components are set up correctly.

Using Oracle HRMS - The Fundamentals

Provides overview information on setting up the organization structure for your Oracle applications implementation. If you are implementing a standalone version on Oracle Partner Management, you will need to set up an organizational structure.

Multiple Organizations in Oracle Applications

Provides complete information about modeling, implementing, and managing your organization structure in Oracle applications.

Oracle TeleSales Implementation Guide

Your implementation of Oracle Partner Management must contain at least one internal organization. Internal organizations can be set up through the Oracle TeleSales

application; refer to the Oracle TeleSales Implementation Guide for information on creating internal organizations.

Oracle General Ledger User Guide

Basic accounting information, as well as a business unit and set of books, for Oracle partner Management is provided by Oracle General Ledger. Refer to the Oracle General Ledger User Guide for information on setting up required organizational units and other accounting features.

Oracle Inventory Implementation Guide

Oracle Inventory serves as the repository for products or collateral that can be ordered from an organization. If an organization is implementing opportunity management and plans to charge fees for partner program enrollment, Oracle Partner Management requires that at least one inventory organization is identified through the Oracle Inventory organization, and that other Oracle Inventory-related set ups be completed.

Oracle Advanced Product Catalog User Guide

Oracle Partner Management derives its product data using the product catalog provided by Product Lifecycle Management. Many of the Oracle Partner Management business flows have products associated with them, and thus a products hierarchy is required for most implementations. Information about setting up and managing the product hierarchy is found in the *Oracle Advanced Product User Guide*.

Oracle Receivables User Guide

Oracle Receivables is used during partner program enrollment to verify partner billing and address information against tax locations.

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 11i. 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 11i, 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 11i. 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 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

"About" Document

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

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screen shots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

Oracle Applications Product Update Notes

Use this guide as a reference for upgrading an installation of Oracle Applications. It provides a history of the changes to individual Oracle Applications products between Release 11.0 and Release 11i. 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 implement, administer, and use Oracle applications. Oracle courses are organized into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

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

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Partner Management working for you. The 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

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

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 an Oracle Applications form 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.

Introduction

This chapter covers the following topics:

- Oracle Partner Management Overview
- Oracle Partner Management Key Features
- Partner Dashboard
- Channel Manager Dashboard
- Partner Profiling
- Programs and Enrollment
- Opportunity Management
- Referral Management
- Deal Registration
- Special Pricing Management
- Partner Funds Management
- Partner Locator

Oracle Partner Management Overview

The majority of Global 5000 businesses generate more than fifty percent of their revenue through indirect sales channels. These companies require a functionally rich and fully integrated partner management solution. Oracle Partner Management fills this need by enabling vendors to efficiently and effectively manage business with 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.

Oracle Partner Management Key Features

The key features are:

- Partner Dashboard, page 1-2
- Channel Manager Dashboard, page 1-2

- Partner Profiling, page 1-3
- Programs and Enrollment, page 1-3
- Opportunity Management, page 1-3
- Referral Management, page 1-4
- Deal Registration, page 1-4
- Special Pricing Management, page 1-5
- Partner Funds Management, page 1-5
- Partner Locator, page 1-6

Partner Dashboard

The partner dashboard is the single entry point for all partners into the vendor's system. Using the dashboards, partners can:

- Self register and enroll into partner programs.
- Manage their partner program memberships, including upgrades and renewals.
- Access vendor stores, browse catalog catalogs, and place orders.
- Accept and manage assigned sales opportunities, create quotes, and place orders.
- Submit referrals, register deals, request partner funds, and request special pricing.
- Maintain organization and contact profiles.
- View notifications.
- Access targeted content such as product news, training information, and FAQs.

In addition, partners that are 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; partner users 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.

Channel Manager Dashboard

The Channel Manager dashboard provides members of the vendor organization with an easy to use, configurable interface. The Channel Manager dashboard provides channel managers and channel representatives with a 360-degree view of their partners and activities, thereby enabling them to make informed decisions.

The Channel Manager dashboard provides three main features:

- The Quick Links bin provides the user with hyperlinks to things such as notifications, opportunities, and partner program-related benefits such as partner referrals and special pricing.
- The Key Metrics bin provides the user with a consolidated view of his partners' performance.
- The Partner Query tool allows vendor users to perform advanced searches for partners based on partner profile attributes. Users can customize the criteria by

adding or removing search attributes to tailor searches. Oracle Partner Management integrates with Oracle Marketing to enable channel managers to generate partner lists. These lists can then be used to run marketing campaigns and events thereby enabling marketing to partners.

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 marketing funds, incentives, and opportunities.

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.

Opportunity Management

A sales opportunity is pending sale that can be forecasted. Oracle Partner Management extends the Oracle Sales opportunities model to support the assignment of indirect opportunities to partners. New opportunities can originate from leads and marketing campaigns, or can be entered manually. Sales representatives and channel managers can assign opportunities to partners.

Opportunity Management provides vendors with flexibility when it comes to matching opportunities with partners, and then routing the opportunities to the partners. Both the partner matching process and the routing process can be automated fully by the creation of rules. Matching and routing can also be partially automated, or can be performed manually by a vendor user.

When you route an opportunity to a partner, the partner can view details about the opportunity and accept or decline it. At any time, the partner can also abandon the opportunity.

The key features are:

- A rules-based engine that can automatically processes leads, identify appropriate partners for an opportunity, and route the opportunity to partners based on opportunity criteria and partner profile.
- Workflow based approval and notifications.
- Multiple routing types allows the vendor to route an opportunity to one or multiple partners.
- Ability to manually search for partners based on their profile.

Referral Management

Referral Management enables partners to refer business opportunities that they cannot fulfill directly to the vendor 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.

The key features are:

- Partners can submit referrals online and track the progress of the referral from submission to acceptance to payment.
- A configurable questionnaire allows the vendor to collect relevant information about a potential opportunity.
- Workflow driven approvals and notifications allow the vendor to 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.
- 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 a submitted referrals, check for duplicate leads or opportunities, 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.

Deal Registration

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

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 allow the vendor to 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.
- Program managers can setup deal initiatives based on geography and/or product lines.
- Channel Managers and Registration Managers can review a registered deal, validate the 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.

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 allows the vendor organization to respond quickly and intelligently to its partners' requests for special, discounted pricing, thus closing more sales and increasing partner loyalty.

The key features are:

- Partners can request special pricing, view the status of their special pricing requests, and submit claims.
- A vendor user can submit a special pricing request on behalf of a partner.
- Special pricing request approvers can review special pricing information while approving a special pricing request, identify similar requests, and link them.
- Automatically accrue liabilities on the maximum amount requested for similar requests.
- The vendor can gather competitive information for products.
- The vendor can create claims and see outstanding special pricing requests.

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 vendors to better manage and distribute channel marketing funds to channel partners. With a centralized marketing budgeting and claims management system, including a partner self-service interface to submit fund requests and claims, the vendor can share channel marketing funds with 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. Funds can be provided for a specific time period and based on an organization's fiscal cycles.

The key features are:

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

Partner Locator

The Partner Locator allows a potential customer to search for partners, resellers, and value-added resellers that are registered with the vendor organization. The Partner Locator integrates with the vendor's Web portal, which makes it available for customers independent of the Partner Dashboard or the Oracle Partner Management application.

The Partner Locator allows potential customers to provide some basic search criteria, and then returns partners that are within a vendor-specified distance of the customer. The Partner Locator can provide driving directions and maps to better help customers find partners.

Prerequisites and Optional Integrations

This chapter covers the following topics:

- Overview
- Prerequisites
- Optional Integrations

Overview

Implementing Oracle Partner Management involves setting up and integrating with various other Oracle applications. Some of the prerequisite set ups are necessary to provide basic functionality. Other optional set ups allow you to extend the functionality and capabilities of the Oracle Partner Management application.

Set ups that are required for Oracle Partner Management to function properly are called mandatory prerequisites. This chapter describes these requirements and provides some information to help you set up and implement them properly. For more thorough information on setting up the mandatory prerequisites, you will need to refer to other documentation.

Optional integrations refer to other Oracle applications that Oracle Partner Management relies upon for additional functionality. Which applications you need to integrate with depends upon which feature of Oracle Partner Management you implement.

Prerequisites

An Oracle Partner Management implementation depends upon a number of other Oracle applications to provide things such as an organizational structure, creation and management of employees and other resources, support for multiple currencies and languages, accounting and inventory functions.

If you are implementing Oracle Partner Management as part of a larger Oracle HRMS or CRM implementation, many of the prerequisites will be set up already. If you are implementing Oracle Partner Management standalone, you will need to implement the feature or applications described in this section. You should complete the set up procedures discussed in this section before implementing Oracle Partner Management.

Setting up the Oracle Applications Organizational Structure

Part of implementing Oracle applications involves setting up a virtual model of your enterprise in the Oracle Human Resources Management System (HRMS). Oracle

applications uses the term “organization” to refer to the various business units that make up an enterprise, and the model of the enterprise in HRMS is referred to as the “organizational structure.” A business can support multiple organizations running any Oracle applications product with a single installation. When you run any Oracle Applications product, you first choose an organization, either implicitly by choosing a responsibility or explicitly in a choose Organization window. Each window and report then displays information for the selected organization only.

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

Depending on business requirements, your organizational structure can contain one or more Set of Books, and various organizations, such as operating units, legal entities, and inventory organizations.

If you are implementing Oracle Partner Management as a standalone application, you will need to creating an organizational structure. Most of the organizational structure is set up through HRMS. (An exception is the Set of Books, which is set up through the Oracle General Ledger application.) For more information on using HRMS, refer to the guide *Using Oracle HRMS - The Fundamentals*. For complete information about modeling, implementing, and managing your organizational structure in Oracle Applications, refer to the guide *Multiple Organizations in Oracle Applications*.

Setting up an Internal Organization

An internal organization is needed for partner creation, as it allows a "partner of" relationship to be created for each partner that is added to the database. At least one internal organization must be set up for an Oracle Partner Management implementation, and then the profile option PV: Default Vendor Organization must be populated with the name of the internal organization. If only one internal organization is set up for an implementation, the profile option is set at the application or site level. If more than one internal organization is set up, the profile option must be set at the responsibility level for the default partner responsibility. The internal organization information must be set up before partners can successfully self-register. It is also required for the Customer to Partner conversion.

Internal organizations are created through the Oracle TeleSales eBusiness Center application. One of the following responsibilities is required to set up an internal organization:

- TeleSales Agent
- TeleSales Manager
- Telemarketing Agent

For information on creating an internal organization, refer to the *Oracle TeleSales Implementation Guide*.

Setting up Oracle CRM Technology Foundation

Oracle CRM Technology Foundation provides a common infrastructure on which all CRM applications are built. By providing a set of application components, CRM

Foundation ensures that all applications interact with key business objects in a consistent manner.

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

Resource Manager

Resource Manager is mandatory for an Oracle Partner Management implementation. This component enables you to use application resources regardless of where they are created. Resource manager serves as a central repository for resources, resource groups, teams, and roles.

Resources such as employees, suppliers, parties, or partners, that have been created in other applications can be imported into Resource Manager. Once imported, the resource becomes available for CRM applications.

Task Manager

Task Manager is mandatory for an Oracle Partner Management implementation. It provides a mechanism for your application to respond to customer needs in a timely manner by creating and distributing work assignments (such as appointments, callback requests, and service requests) to individuals.

1-to-1 Fulfillment

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

Notes and Note Types

A note is free-form text attached to an object that records descriptive information about business transactions and that can be referenced across modules. Notes can be created by both vendor and partner users.

Notes can be further defined by setting up note types. A note type is used to classify notes, such as general note type or interaction note type. In addition to the seeded note types, additional note types can be created during implementation to further categorize notes, if necessary.

Oracle Notes comes with a set of predefined note types; optionally, you can create additional note types and map note types to a source. Refer to *Setting up Notes*, page 3-13 for more information about implementing Oracle Notes for use with Oracle Partner Management.

Territory Manager

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

Territory Manager is required for the channel manager dashboard since channel teams are populated based on territory assignment. Territory Manager is also required for referrals and deal registration, as claims are assigned based on territory definitions. It is also needed for opportunities and leads. Refer to *Setting up Territories in Oracle*

Territory Management, page 3-6 for more information about creating Territories for use with Oracle Partner Management.

Note: You must create a territory with the Oracle Partner Management usage to populate channel teams. If you are implementing referrals or deal registration, you must also set up a second territory with the Oracle Trade Management usage (if it has not been created already for the Oracle Trade Management application).

Assignment Manager

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

Setting Up Application Object Library

Oracle Applications Object Library (AOL) 11i provides some of the underlying support structures and features that are used by all Oracle applications. AOL provides the following:

- Multiple-currency support.
- Multiple-language support.
- Creation of responsibilities and association of responsibilities with users
- Creation of menus and the association of menus with responsibilities. - AOL
- Creation of users and user names - The ability to create users is provided by AOL. A user must have a user name, and the user must be assigned at least one responsibility.

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

Setting Up General Ledger

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

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

Setting Up Oracle Inventory

In Oracle Partner Management, Oracle Inventory is necessary for the successful functioning of various flows. Oracle Inventory serves as the repository for products or collateral that can be ordered from an organization. Products or items in Oracle Inventory reside in the MTL_SYSTEM_ITEMS table.

Opportunities and special pricing requests have products associated with them; these products must be present in Oracle Inventory for them to be tracked in the system and subsequently available for use in Oracle Partner Management. In addition, if partners will be charged a fee to enroll in partner programs, then partner programs must be available as items in Oracle Inventory.

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

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

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

Setting Up Product Lifecycle Management

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

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

Setting Up Oracle Receivables

Oracle Partner Management uses Oracle Receivables to record customer information. Customer registration information is maintained in the Trading Community Architecture (TCA). TCA stores all customer, partner, prospect, and other customer related information in a single repository. Oracle Accounts Receivable is used during partner program enrollment to verify partner billing and address information against tax locations.

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

Optional Integrations

This section describes the Oracle applications with which Oracle Partner Management integrates. Which applications a specific Oracle Partner Management implementation will integrate with is determined by the flows and functionality that are set during implementation. The following table provides an overview of Oracle Partner Management integrations by flow or feature. In the rest of this section, more detailed information is provided about each integrated application and how it is used by Oracle Partner Management.

Integration of Oracle Partner Management and Other Oracle Applications

Function or Flow	Oracle Application
Channel Manager Dashboard	General Ledger, Marketing, Order Management, Sales, Trade Management, Territory Management
Deal Registration	Approvals Management, Data Quality Management, Sales, Territory Management, Workflow Builder
Opportunity Management	Quoting, Sales, Workflow Builder
Partner Dashboard	iStore, Marketing
Partner Funds	Approvals Management, Inventory, Trade Management, Workflow Builder
Partner Program Enrollment	Approvals Management, iPayment, Order Management
Partner Programs	Advanced Pricing, Approvals Management, Content Manager, Contracts, Inventory, Marketing, Order Management, Workflow Builder
Referrals	Approvals Management, Data Quality Management, Sales, Trade Management, Territory Management, Workflow Builder
Special Pricing	Approvals Management, Data Quality Management, Marketing, Trade Management, Workflow Builder

Oracle Advanced Pricing

Oracle Advanced Pricing is used to set up price lists and manage pricing for Oracle applications. Oracle Partner Management can use Oracle Advanced Pricing to track and manage pricing for partner programs. In addition to allowing you to set up a price list for a partner program, Oracle Advanced Pricing can be used to calculate taxes on a state or national level, to track customer discounts, and to perform currency conversion.

Oracle Partner Management can use either Oracle Advanced Pricing or Oracle Order Management to create and store pricing information associated with partner programs. Which application is used is determined by the profile option QP: Source System Code (set at the application level).

Oracle Approvals Management

Oracle Approvals Management (AME) is a self-service web application that allows users to define business rules governing the process for approving transactions. AME enables business users to specify approval rules for a flow without having to write code or customize the application.

Oracle Approvals Management is used in the following Oracle Partner Management flows:

- **Deal Registration.** Approvers and approval rules for deal registration requests are created and managed through AME.
- **Partner Funds.** Approvers and approval rules for partner fund requests are created and managed through AME.
- **Partner Program Enrollment.** Approvers and approval rules for partner program registration requests are created and managed through AME.
- **Referrals.** Approvers and approval rules for lead and opportunity referral requests are created and managed through AME.
- **Special Pricing.** Approvers and approval rules for special pricing requests are created and managed through AME.

Oracle Content Manager

Oracle Content Manager (OCM) is a key component of the Sales, Marketing and E-Commerce applications that enables content to be stored and managed in a central repository. OCM features include work flow, versioning, translations, and renditions. Using content types, OCM is able to keep content separated from its presentation layer.

Oracle Content Manager is used in the following Oracle Partner Management flows:

- **Partner Programs.** Oracle Content Manager is used to store the HTML content, including images, that appears in the Program Overview. The Program Overview provides a summary of a partner program.
- **Partner Dashboard.** When an organization uses OCM as the information repository for iStore, the images and text that appear on the Partner Dashboard will be stored in OCM as well.

Oracle Contracts

Oracle Contracts provides the common infrastructure components that are used by Oracle applications to create and manage contracts. The common components provided by Oracle Contracts are a terms library, authoring and printing tools, and contract document management.

A vendor organization might require its partners to agree to legal terms and conditions as a requirement for participating in a partner program. Oracle Partner Management uses Oracle Contracts to provide legal terms for partner programs. A partner program can have one or more contracts associated with it. Which contract a partner sees can be controlled by defining geographic and member type conditions for each contract.

Oracle Data Quality Management

Data Quality Management (DQM) is a tool from the Oracle Trading Community Architecture (TC) group that is used to check for duplicate information. Oracle Partner Management uses DQM to check for potential duplicate customers, contacts, and special pricing requests.

Oracle DQM is used in the following Oracle Partner Management flows:

- **Deal Registration.** DQM is used to find potential customer or contact matches for deal registration requests submitted by partners.

- **Referrals.** DQM is used to find potential customer or contact matches for leads or opportunities submitted by partners.
- **Special Pricing.** DQM is used to find potential customer or contact matches for special pricing requests submitted by partners. Regulations required that the same pricing be offered to all partners bidding on the same deal. DQM is used to identify special pricing requests submitted by different partners for the same deal.

Oracle iPayment

Oracle iPayment is a framework that enables you to build integrations with financial institutions and payment processors for payment and receipt processing. Oracle iPayment provides you with out-of-the-box integrations with leading payment vendors. You can create additional integrations as needed.

Oracle iPayment also provides you with a common payment engine for outbound and inbound payments. It also allows you to manage credit card risk and perform transaction reporting. Oracle iPayment also supports secure transactions.

Oracle Partner Management uses iPayment to enable electronic payment for partner program enrollment. Before being able to accept electronic payments through iPayment, an iPayment server must be set up. In addition, an organization will need an SSL certificate to implement HTTPS to secure credit card transactions.

Oracle iStore

Oracle Partner Management uses iStore to build the Partner Dashboard and to set up security for the dashboard based on partner responsibilities. If you are integrating with Oracle Marketing, you can also create web advertisements and display them on the Partner Dashboard. Oracle iStore is also used to create the online partner program enrollment flow. A specific enrollment flow template has been seeded to simplify the design of enrollment pages.

Oracle Marketing

Oracle Marketing helps marketing professionals create campaigns that are targeted toward customers. Oracle Marketing provides numerous tools that help marketing professionals to analyze campaign effectiveness, create and manage campaign budgets, capture leads generated by campaigns, create a manage promotions, and generate price lists that meet customer demands.

Oracle Marketing is used in the following Oracle Partner Management flows:

- **Channel Manager Dashboard.** A vendor user with the appropriate permission sees a Create as List button on his Partners page. Clicking this button creates a list containing the partners displayed on the page. The list is accessible from Oracle Marketing, and can be used to create a marketing campaign targeting the partners.
- **Opportunity Management.** Opportunities generated by marketing campaigns can be routed to the indirect channel (by Oracle Sales) and subsequently routed to partners.
- **Partner Dashboard.** Users can create and execute web advertising campaigns that appear on Partner Dashboards. Oracle Marketing is used to create the web placement for the ad, create the campaign and campaign schedule, and select the ad content. A web campaign can appear on all partner dashboards or a list of partners can be created and a campaign can be set up that targets those partners specifically.

- **Partner Funds.** A partner fund is associated with one or more budgets. In turn, each budget is associated with one or more marketing activities. The activities are created in Oracle Marketing, and are associated with budgets when the budgets are created in Oracle Trade Management.
- **Partner Programs.** Partner program approval is managed through the Oracle Marketing approvals process. The Oracle Marketing approvals process allows approvers to be associated with a partner program type, and allows approval requests to be routed sequentially. The Oracle Marketing Framework works behind the scenes to route approval requests, send notifications, and manage approval statuses.

Oracle Order Management

Oracle Order Management allows you to efficiently capture customer orders from multiple sales channels and fulfill orders using any fulfillment method. Oracle Order Management captures demand from multiple sales channels including web stores, field sales, call centers, service centers, and customer systems. Oracle Order Management integrates with Oracle Advanced Pricing to provide a highly flexible setup mechanism and pricing engine that accurately applies pricing, deals and promotions to customer orders.

Oracle Order Management is used in the following Oracle Partner Management flows:

- **Channel Manager Dashboard.** Oracle Order Management provides the data for the Sales Year-to-Date key metric. This data is also used to create the graph that appears on the dashboard.
- **Partner Programs:** Oracle Order Management is used process cash, check, or credit card payment methods for partner programs. Additionally, Oracle Order Management can be used to set up price lists for partner programs.
- **Partner Program Enrollments.** Oracle Order Management creates a sales order and provides the billing functionality for partner program enrollments. Oracle Order Management allows you to associate a sales person with enrollment request orders and set up order cancellation reasons.
- **Special Pricing.** Accrual and off-invoice special pricing requests are fulfilled with inventory that is ordered from the vendor organization (scan data special pricing requests are fulfilled with existing partner inventory). Order Management is used to place and manage the orders for new inventory special pricing requests.

Oracle Quoting

Oracle Quoting enables simple, secure creation and management of customer quotes across sales and interaction channels. Oracle Quoting is used in Opportunity Management flows. Once a partner accepts an opportunity, a partner user can create a quote for the customer and publish it to the customer. The partner user can add products to the quote and select a price list for the quote, and then submit the quote for approval by the vendor. Once the partner, customer, and vendor agree on the quote, the partner user can place an order (through Oracle Order Management) and monitor the order status.

Oracle Sales

Oracle Sales is an application for sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Partner Management's

Opportunity Management pages are provided by the Oracle Sales application. You might need to perform some implementation procedures to ensure that the opportunity pages appear and function correctly. Refer to Setting up Opportunity Assignment , page 10-1 for additional information.

Oracle Sales is used in the following Oracle Partner Management flows:

- **Channel Manger Dashboard.** The Channel Manager Dashboard displays opportunity metrics in the Key Metrics areas. In addition, the Partner Details page displays sales, deal, and opportunity information, all of which comes from the Oracle Sales application.
- **Deal Registration.** When a partner's deal registration request is approved, a new opportunity is created for the deal. Opportunities are stored in Oracle Sales tables. If an organization is using both Oracle Sales and Oracle Partner Management, the opportunity will be visible from both applications.
- **Opportunity Management.** The pages that appear in the Opportunity Management portions of Oracle Partner Management are Oracle Sales opportunity pages. However, opportunities that are assigned to partners contain information about the Channel Team; this information does not appear on opportunities handled through an organization's direct sales channel.
- **Referrals.** When a partner's referral is approved, either a new opportunity or lead is created, or the referral is linked to an existing opportunity or lead. Opportunities and leads are stored in Oracle Sales tables. If an organization is using both Oracle Sales and Oracle Partner Management, the opportunity or lead will be visible from both applications.

Oracle Trade Management

Oracle Trade Management provides the consumer goods industry tools to aid in trade planning and offer management, budget management, claim and deduction management, and indirect sales management. Oracle Trade Management is used in the following Oracle Partner Management flows:

- **Channel Manager Dashboard.** From the Channel Manager Dashboard, a vendor user can see the amount of money that is owed to a partner to settle its open claims, and the amount of partner funds a partner has requested year-to-date. Claims and funding requests are managed through Oracle Trade Management, which provides Oracle Partner Management with this partner data.
- **Referrals.** Oracle Trade Management is used to compensate partners for referring winning leads and opportunities to the vendor. Oracle Trade Management is used to create and manage one or more budgets that are used to track compensation to partners who refer opportunities. When a partner's referral compensation request is approved, an offer corresponding to the request is also created in Oracle Trade Management. Finally, Oracle Trade Management generates a claim against a partner's offer when the order generated by the referred opportunity is shipped.
- **Partner Funds.** Oracle Trade Management is used to reimburse partners that have participated in successful marketing campaigns for the vendor. Oracle Trade Management is used to create and manage one or more budgets that are used to fund partner marketing activities. In addition, Oracle Trade Management provides a seeded offer type that is used to generate claims for partners who are requesting reimbursement for their activities.

- **Special Pricing.** Oracle Trade Management is used to reimburse partners for special pricing situations. Oracle Trade Management is used to set up one or more budgets to track special pricing funds. In addition, Oracle Trade Management seeds three offer types that are used to create and manage different types of special pricing requests. Depending on the type of special pricing request submitted, a partner may need to submit a claim for reimbursement, which is handled through Oracle Trade Management as well.

Oracle Workflow Builder

Notification messages for numerous Oracle Partner Management flows are created and managed using the Oracle Workflow Builder 2.6 application. The notifications are associated with an object (such as a fund request or special pricing request) and are sent out as the result of an event, such as the change of an object's status.

Seeded notifications and messages for Oracle Partner Management are provided in Oracle Workflow Builder; in this guide, lists of notifications and messages are provided in the chapter devoted to each flow that integrates with the application. You might be able to implement the seeded notifications without modification. However, if you need to make changes to the seeded notifications or create new notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database.

Oracle Workflow Builder is used in the following Oracle Partner Management flows:

- **Deal Registration.** Notifications are sent to recipients at various times in the deal registration process.
- **Opportunity Management.** Notifications are sent to various recipients when an opportunity's status changes.
- **Partner Funds.** Notifications are sent to recipients at various times in the fund process.
- **Partner Programs.** Notifications are sent to partners based upon partner program enrollment request status. Notifications are also sent to a partner when its membership in a program is nearing expiration. Notifications are sent to the partner user with the Partner Primary User role.
- **Referrals.** Notifications are sent to recipients at various times in the referral process.
- **Special Pricing.** Notifications are sent to recipients at various times in the special pricing request process.

Common Implementation and Administration Tasks

This chapter covers the following topics:

- Overview
- Creating Approval Rules in Oracle Approvals Manager
- Setting up Territories in Oracle Territory Manager
- Setting up Notifications in Oracle Workflow Builder
- Setting up Matching Rules with Oracle Data Quality Management
- Setting up Notes

Overview

This chapter provides information about implementation or administration tasks that you might need to perform for multiple Oracle Partner Management business flows or features. To avoid redundancy, information about these tasks and procedures for completing them are presented in this chapter. Additional information that is needed to complete the task for a specific flow or feature is presented in the appropriate chapter.

To complete the tasks in this chapter, you will need access to other applications, or have access to a user who is responsible for administering those applications. The information and procedures provided in this chapter are fairly high-level; to gain a more thorough understanding of the procedures and their associated applications, you will want to refer to the documentation for the application.

The following table lists the implementation and administration tasks contained in this chapter, the business flows or features that require the tasks, and the applications in which you will complete the tasks.

Common Implementation and Administration Task Overview

Task	Business Flow or Feature	Application
Creating Approval Rules	Deal registration requests	Oracle Approvals Management
	Lead or opportunity referral requests	
	Partner funds requests	
	Partner program enrollment requests	
	Special pricing requests	
Setting up Territories	Channel team creation	Oracle Territory Manager
	Deal registration requests	
	Lead or opportunity referral requests	
Setting up Notifications	Deal registration requests	Oracle Workflow Builder version 2.6.2
	Lead or opportunity referral requests	
	Partner funds requests	
	Partner program enrollment requests	
	Special pricing requests	
Setting up Matching Rules	Special pricing requests	Oracle Data Quality Management
	Deal registration requests	
	Lead or opportunity referral requests	
Setting up Notes	Deal registration requests	Oracle Common Application Components
	Lead or opportunity referral requests	
	Partner fund requests	
	Special pricing requests	

Creating Approval Rules in Oracle Approvals Manager

Approval rules and approvers for partner program enrollment requests, special pricing requests, partner fund requests, deal registration and referral requests, and Data Quality Management (DQM) approvals are defined in the Oracle Approval Management application.

An approval rule associates one or more conditions with an approval in an if-then statement, and each condition tests the value of an attribute (you can think of an attribute as a variable). The approval rule also defines the list of approvers to which the transaction is routed if the conditions are met. For example:

```
If
condition C1 is true and
condition C2 is true
then
do approval A1
```

For example, to create the approval process “For a referral request from a partner in the United States, require approval from a user with the Channel Manager role,” the rule might be:

```
If
CUSTOMER_COUNTRY = US
then
require user with role Channel Manager to approve
```

You associate a rule with a transaction type, and a transaction type is associated with an application. You can associate the same rule with several transaction types, and therefore several applications.

Setting up approval rules and approvers involves specifying a condition for one or more attributes, setting up approval groups, and defining rules. This section provides some basic procedures for creating an approval rule. For more thorough information about rule creation, refer to the *Implementing Oracle Approval Management* guide.

Creating an approval rule involves a number of steps, which are described in the following sections:

- Setting up a Condition
- Setting up an Approval Group
- Setting up a Rule
- Testing the Rule

When creating an approval rule, a user might need to complete only some of the steps listed in this section. For example, if an approval group already exists, the user would need to create a condition and a rule only.

Oracle Partner Management integrates with AME version 11.5.9, and fully supports features included in that release. Currently, features introduced in AME 11.5.10, such as the ability to set up parallel approvals processes, are not supported.

To set up an approval rule, log in to the self-service application as an Approvals Management Application Administrator and navigate to Approvals Management Application Administrator > Approvals.

Setting up a Condition

Transaction Types are seeded. For Oracle Partner Management, the following transaction types are available:

Transaction Types for Oracle Partner Management

Transaction Type	Used For
PV: Deal Registration Management	Deal registration
PV: DQM approvals	Data quality management
OZF: Special Pricing Request	Special pricing
OZF: Soft Fund Request	Partner fund request
PV: Referral Management Approvals	Partner referral
PV: Partner Program Enrollment Requests	Partner program registration

Use this procedure to create a condition for the approval rule.

1. Click the Set Transaction Type link at the top of the Approvals page and select the appropriate Transaction Type from the drop-down list. Refer to the table above to select the correct transaction type for your condition.
2. Click Continue.
3. Click the Conditions tab, and then click Add a Condition.
4. Select Ordinary as the condition type, and click Continue.
The Choose a Condition page appears.
5. Select an attribute from the drop-down list and click Continue.
The Create a Condition on a String Attribute page appears.
6. Provide a value for the attribute and click Continue.
The Text Values page appears.
7. Click Add a Text Value to define additional values for the attribute, if appropriate.
8. Click Quit to save the condition.

Setting up an Approval Group

Use this procedure to set up an approval group.

1. Click the Groups tab.
A page appears that lists existing groups for the transaction type.
2. Click Add Group.
The Create an Approval Group page appears.
3. Provide information, as required, for the group, and click Create Group.
The Members section appears at the bottom of the Create an Approval Group page.

Note: Use the Active List region to specify whether the list of approvers will be a static or a dynamic list. Static indicates that you will set up a list of approvers for the rule. Dynamic indicates that the application will execute a query to determine the approval

group's membership. Enter the query statement in the Query region below the Active List.

4. Click Add Approver.

The Search for Approver page appears.

5. Select either FND User or HR People from the drop-down list.

Note: Select FND User to search for approvers that are set up as Users. Select HR People to search for approvers who are entered as employees. For Oracle Partner Management, it is recommended that you select HR People.

6. Click Search to return a list of potential approvers.

7. Select an approver from the list and click Continue.

The Select Order Number page appears.

8. Specify the approvers order in the approval process, and click Create Member.

The Edit an Approval Group page appears, displaying the new approver in the Members region.

9. When you have finished adding members to the approval group, click Submit Changes.

Setting up a Rule

Use this procedure to set up an approval rule.

1. Click the Rules tab.

The Add a Rule - Step 1 page appears.

2. Provide information for the rule and click Continue.

The Add a Rule - Step 2 page appears.

Note: There are six rule types available. Different rule types use different conditions and approval types, and have different effects on a transaction's approver list. For Oracle Partner Management, it is recommended that you select list-creation as the rule type.

3. Select "chain of authority includes an approval group" and click Continue.

The Add a Rule - Step 3 page appears.

4. From the "approval group chain of authority Actions" list, select the approval group that you set up for this transaction type and rule and click Continue.

The Add a Rule - Step 4 page appears.

5. Select the condition from the Header Attributes region and click Continue.

Note: The Header Attributes region should contain all the conditions that have been set up for the transaction type. It will also contain the default condition TRANSACTION_SET_OF_BOOKS_ID.

The Add a Rule - Step 5 page appears.

6. Select the conditions to be included in the rule from the Header Conditions area and click Continue.

The rule is created and the approval set up is complete. The Approvals Engine will use this rule to assign the specified type of transaction to a user that matches the conditions specified.

Testing the Rule

From the Test tab, you can test the rule to make sure that it will work properly. You can choose to test the rule against an existing transaction, or have the system create a test transaction.

Setting up Territories in Oracle Territory Manager

Oracle Partner Management uses territories created in Oracle Territory Manager to:

- Associate channel managers and channel representatives with partners (that is, to set up a channel team)
- Identify the country of the customer for which a partner is registering a deal or referring a lead or an opportunity.

A Partner Management territory must be set up before a channel team can be assigned to a partner and opportunities can be matched with partners. In addition, an organization must have a Trade Management territory set up if it is going to implement lead and opportunity referral as a partner program benefit. Optionally, a Trade Management territory can be used for deal registration, although it is not required for implementation. The same Trade Management territory is used for both referrals and deal registrations.

Note: If you are implementing deal registration or referrals, you will need to set up two separate territories. Set up a territory with the usage Partner Management to create a populate channel teams. Set up a territory with the usage Trade Management for use with referrals and deal registrations.

There are three main steps involved in creating a territory: enabling transaction qualifiers, setting up the territory, and running concurrent programs to populate the territory. In this manual, we provide some basic procedures for creating territories using Oracle Territory Manager. For more thorough information about the application and territory creation and management, refer to the *Oracle Territory Manager Implementation Guide*.

Enabling Transaction Qualifiers

Transaction qualifiers are the criteria used by various assignment engines to determine winning territories. The applications that use Territory Manager use different sets of seeded transaction qualifiers. You must enable transaction qualifiers before they can be used in a territory.

Navigation

Log in to Oracle Forms with the CRM Administrator responsibility, and navigate to Territory Manager > Territory Administration. Then, choose Setup Qualifiers from the Administration menu.

Notes

- **Usage:** Select the type of territory you are setting up. The type of territory you select determines the transaction qualifiers that will be available. Click Find to display the qualifiers associated with the territory.
- **Enabled:** Click the Enabled check box for each transaction qualifier you want to use, and then click Update Qualifiers. When you enable a qualifier, you make it available for use when setting up a territory.

Setting up the Territory

A territory is a hierarchal organization of resources. For Oracle Partner Management, you will need to set up a territory with the Oracle Partner Management usage that allows you to assign vendor employees to partners so that you can create channel teams and match opportunities to partners. If you are implementing referral management or deal registration, you set up a territory with the Oracle Trade Management usage that associates partners with countries or regions. The territories you create model a physical organization of business entities.

Navigation

Log in to Oracle Forms with the CRM Administrator responsibility, and navigate to Territory Manager > Territory Administration. Then, choose Define Territory from the Administration menu.

Prerequisites

The transaction qualifiers have been enabled.

Steps

1. Click the Overview tab, and provide values in the following fields as appropriate:
 - **Usage:** Select the type of territory you are setting up. Select Oracle Partner Management when creating a territory for the channel team. Select Oracle Trade Management when creating a territory for deal registration or referral management.
 - **Parent:** Enter Catch All if you are creating the top-level territory. Otherwise, select the appropriate parent territory from the LOV.
 - **Number of Winners:** Number of winners refers to the number of territories below the top-level territory that can be identified as matching (that is, "winning") territories for a partner or a claim (number of winners does not apply to offers). There are two possible outcomes based on values entered in the Number of Winners field:
 - **One Winner:** If you enter 1 in the Number of Winners field, Oracle Territory Manager assigns the business object to a single territory in the hierarchy. If more than one territory could be considered a winner, use the territory ranking mechanism for tie-breaking.
 - **Multiple Winners:** If you enter a number greater than one in the Number of Winners field, Oracle Territory Manager can assign a business object to multiple

territories. Again, if there are more winning territories than the number you have specified, territory ranking is used for tie-breaking.

- **Rank:** Used to specify the priority of a territory among multiple winners. If no rank is defined, the choice will be decided randomly. If more than one territory level is identified as a possible match for a business entity, the lowest-ranked territory wins at the same level in the hierarchy. For example, from rank 1 to 10 for the same hierarchy level, rank 1 has the highest priority.
 - **Transaction Types:** Use the LOV to select one or more types of transactions based on the territory usage. Note that some application types allow you only one transaction type.
 - **Freeze:** Leave unchecked
2. Click the Transaction Qualifiers tab, and select one or more transaction qualifiers for the territory.

The list of available qualifiers is populated with the qualifiers that you enabled for the transaction type.

3. In the Qualifier Values area, define operators and values for the transaction qualifier selected. The operators and values available are determined by the transaction qualifier selected.
4. Click the Resources tab to select resources for the territory.

A resource can be an individual, a resource group, or a resource team. Each resource must have the access type Partner.

Running Concurrent Programs

Once the territory is set up, the following concurrent programs must be run to properly populate the territories with partners and channel teams:

- OZF-TM: Generate Party List for Market Qualifier
- OZF-TM: Generate Party List for Market Qualifier
- PV: Channel Team Assignment for Partners in TOTAL/INCREMENTAL Mode
- PV: Define Channel team for specific territories

Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for additional information on the purpose of these programs.

Setting up Notifications in Oracle Workflow Builder

Notification messages for deal registration requests, partner fund requests, special pricing requests, and lead or opportunity referral requests are created using the Oracle Workflow Builder 2.6 application. The notifications are associated with an object (such as a fund request or special pricing request) and are sent out as the result of an event, such as the change of an object's status. The notifications for a specific module are identified by a unique Item Type; the following table lists the notification item types for Oracle Partner Management flows.

Notification Item Types for Business Flows

Business Flow	Notification Item Type
Deal registration request	PVDEALRN
Partner fund request	OZFSFBEN
Special pricing request	OZFSPBEN
Lead or opportunity referral request	PVREFRRL
Opportunity routing and assignment	POL Assignment Routing

Seeded notifications and messages for Oracle Partner Management are provided in Oracle Workflow Builder. You might be able to implement the seeded notifications without modification. However, if you need to make changes to the seeded notifications or create new notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database. Note that you can not create new notifications for opportunity routing or assignment, but you can modify the text of the seeded notifications.

In this guide, we provide instructions for changing a message's text and adding a URL to a message. The messages are written in HTML, and can be modified without programming. For each message, tokens have been created that are associated with message attributes. Examples of message attributes include objects such as a partner name, approver name, program name, etc. Tokens make it easy to personalize messages for recipients.

If necessary, you can also create additional processes, create notifications for the processes, and associate new or existing messages with the notifications. Creating new processes, notifications, and messages requires programming skills.

For additional information on using Oracle Workflow Builder, refer to the *Oracle Workflow Builder Implementation Guide*.

Changing Message Text

Use this procedure to change the text contained in a notification message.

Navigation

Launch the Workflow Builder 2.6 client application and make sure that the application's access level is set to 100 by navigating to Help > About Oracle Workflow Builder 2.6. Then, navigate to File > Open, select the Database radio button, and provide the values needed to connect to the database.

Prerequisites

You must have installed the Oracle 9i database and Oracle Workflow Builder version 2.6.2.

Steps

1. Locate the notification's Item Type and expand it.
2. Locate the Messages node to see a list of messages that have been seeded for the Item Type. You can see the tokens created for a message by expanding the Message node.

3. To edit a message double click its icon to display the Navigator Control Property window, and then click Body tab, and then the HTML Body tab.
4. Make changes to the text as required.
5. Click OK and save your changes.

Adding a URL to a Message

Use this procedure to add a URL to an existing notification message.

Navigation Launch the Workflow Builder 2.6 client application and make sure that the application's access level is set to 100 by navigating to Help > About Oracle Workflow Builder 2.6. Then, navigate to File > Open, select the Database radio button, and provide the values needed to connect to the database.

Prerequisites

You must have installed the Oracle 9i database and Oracle Workflow Builder version 2.6.2.

Steps

1. Add a new attribute by right clicking with the mouse placed on the Attributes Node and then providing the following information:
 - Internal Name = <internal name> (for example: TEST)
 - Type = URL
 - Value = <URL address>
2. Drag the newly created attribute into the message in which you want the URL to appear.
3. Double-click the message to display the Navigator Control Properties window.
4. Click the Body tab.
5. Add the URL attribute created previously by preceding the internal name with an "&" (for example: &TEST).

Setting up Matching Rules with Oracle Data Quality Management

Data Quality Management (DQM) is a tool from the Oracle Trading Community Architecture (TC) group that is used to check for duplicate information. Oracle Partner Management uses DQM to check for potential duplicate customers, contacts, leads, opportunities, referrals, deal registrations, and special pricing requests.

When a referral, deal, or special pricing request is submitted by a partner, a DQM approver in the vendor organization compares the new information against existing records. If there are no matches for the customer or contact associated with the referral, deal, or special pricing request, the new customer and contact are created in the system. If there are matches for the object, the DQM approver reviews the existing records decides to do one of the following:

- Associate the new customer and/or contact with an existing customer record.
- Create a new organization and contact.
- Associate the special pricing request with an existing request.

The following information is intended to get you started with DQM. For more information setting up DQM rules, refer to *Oracle® Trading Community Architecture Data Quality Management User Guide*.

The TCA Registry

You use DQM to manage duplicate parties in the TCA registry. The TCA registry is the central repository of party information for all Oracle applications. The party information includes details about organizations and people, the relationships among the parties, and the places where the parties do business.

Attributes and Transformation Functions

DQM has defined four types of attributes that represent logical entities that are stored in the TCA registry: party, address, contact, and contact point. Each attribute corresponds to a table column in the TCA registry. Attributes are used to search for possible matches between an input record and the TCA registry data. Numerous seeded attributes are provided; you can also create custom attributes.

New records can include typographical errors, spelling errors, inconsistent formats, and abbreviations due to input errors. For this reason, searches performed on raw values often are inconclusive or miss potential matches. Transformation functions transform attribute values in the staged schema so that the values are more similar and useful for the purpose of matching records. Transformation functions neutralize the effects of data errors on your searches. For example, a transformation function that removes all of the double letters in a party name transforms a name such as Allied Freight into Alied Freight. This transformation makes it easier to match to a party if a typographical error, such as a missing double letter, exists.

After your raw data has been transformed and populated into the staged schema, match rules can use the transformed data to score each record to determine if the record is considered alike enough to be a match to an input value.

DQM includes several seeded transformation functions. You can also create custom functions.

Match Rules

Match rules determine whether two parties should be identified as a match or potential duplicate. When you define match rules, you specify which attributes will be used in the matching, and configure how the attributes should be evaluated. For each attribute that you use in a match rule, you also assign one or more transformation functions. You can also set up scoring rules, which allow you to calculate a match score for each record. Scoring provides more flexible and granular matching.

Creating a Match Rule

Use this procedure to create a match rule.

Navigation

Log in to Oracle Forms as a Trading Community Manager and navigate to Data Quality Management > Setup > Match Rules.

Steps

1. Provide a rule name and a description.

2. In the Purpose area, select Expanded Duplicate Identification.
3. Click the Acquisitions tab, and provide values in the following fields as appropriate:
 - **Attribute Name:** Select one or more attributes from the LOV. To identify duplicate customer, select an attribute with an entity type of Party. To identify duplicate contacts, select an attribute with an entity type of Contacts. When you select an attribute, the Entity and Type fields are populated automatically.
 - **Filter:** You can use an attribute as a filter so that the attribute always appears as a match in the returned records. The search engine groups attributes of a logical entity, under a match-all condition, when the attributes are used as filters. This grouping overrides the match requirement selected in the Attributes Match region.

Attributes used as filters should not be used for the Scoring component of the match rule because all records contain them.
 - **Attribute Match:** If you specify more than one attribute in the match rule, specify whether all attributes must match or any attributes can match fields on the record to identify a record as a potential match.
 - **Transformation Name:** You must select at least one transformation function for each attribute. The functions contained in the LOV are determined by the attribute type selected. When you select a function, the Description field is populated automatically.

Use the fewest transformation functions as possible for a match rule, as using many functions could negatively impact system performance.
4. Click the Scoring tab and provide values in the following fields as appropriate (setting up Scoring is optional):
 - **Attribute Name:** Select one or more attributes from the LOV. When you select an attribute, the Entity and Type fields are populated automatically. The attributes for which you set up scoring do not need to be the same attributes that you selected for matching.
 - **Score:** Assign a numerical score to the attribute. Assign the highest score to the attribute that you consider the most important for a match. The score is awarded to a record if the attribute is evaluated as a match. If the attribute does not match, a score of zero is assigned.
 - **Transformation Name (Scoring tab):** You must select at least one transformation function for each attribute for which you've set up scoring. When you select a function, the Description field is populated automatically.
 - **Weight (%):** Enter the percentage of the attribute score that is factored into the weighted total score in the event of a match.
 - **Exact or Similarity:** Indicates if a transformation function requires an exact match or applies the similarity algorithm. If you select the similarity option, you must enter a percentage in the Similarity (%) field.
 - **Match Threshold:** Enter the minimum match score. The minimum match indicates the minimum set of attributes that are required for a match.
 - **Automatic Merge Threshold:** Enter the minimum set of attributes that are required for considering two parties for merge. The total of the attribute scores of this minimum set is the maximum value for the automatic merge threshold.

- The automatic merge threshold must be greater or equal to the match threshold.
5. Click Compile to compile, lock, and save the match rule.

Setting up Notes

Oracle Common Application Components (CRM) provides Notes functionality that allows users to associate free-form comments with a business object. In Oracle Partner Management, CRM Notes are available for deal registration, referrals, partner funds, and special pricing.

Oracle Partner Management is seeded with numerous note types; you can create additional note types to meet your organization's needs. To reduce the number of note types that your users see when selecting a note type when creating a new note, you can map note types to a source.

This section provides some basic procedures for creating note types and mapping note types to a source. For more thorough information about notes, refer to the *Oracle Common Application Components Implementation Guide*.

Creating a Customized Note Type

Use this procedure to create a customized note type.

Navigation

Log in to CRM with the CRM Administrator responsibility, and navigate to Notes Setup > Note Type Setup.

Prerequisites

None.

Notes

- **Code:** Enter a code for the new note type. The code should comprise the code name of your application and a note type name. The code for Oracle Partner Management is PV. For example, the code for a note type for Referrals could be PV_REFERRALS.
- **Meaning:** This field contains the name of the note type as you want it to appear in the application.
- **Enabled:** Check to make the note type available for use.
- **End Date:** Enter an date after which the note type will be unavailable for use in the application.

Mapping Note Types to a Source

After creating a note type, you can map it to a source object. Mapping note types to a source object limits the number of note types that are available for users.

Navigation

Log on to the CRM application with the CRM Administrator responsibility, and navigate to Notes Setup > Source and Note Type Mapping.

Prerequisites

The note type must exist.

Notes

- **Source Object:** A source object is a business object that initiates the creation of a note. A note must have a source object. For example, to associate the Referrals note type with partner lead and opportunity referrals, select Lead Referral.
- **Note Type:** Select a note type that you would like to map to the source. You can map multiple note types to a single source.
- **Application:** Optionally, you can select the application that this mapping is for. Select Oracle Partner Management.

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

Setting Up Vendor Users

This chapter covers the following topics:

- Overview
- Understanding Vendor Users
- Understanding Responsibilities, Roles, and Permissions
- Creating a Vendor User
- Creating a Channel Administrator
- Setting up Resource Groups and a Resource Group Hierarchy
- Setting up a Partner Hierarchy

Overview

Vendor users are members of the vendor organization who are responsible for working with partner organizations to manage the organization's indirect sales channel.

Vendor users are set up initially during implementation. The channel administrator will also need to create new vendor users periodically. Creating a vendor user involves the following steps:

- Entering a person as an employee in the HRMS application
- Setting up the employee as a user and assigning responsibilities to the user
- Importing the user as a resource in the CRM Resource Application, assigning resource roles to the user, and adding the user to a resource group
- Assigning permissions to the user

In addition to vendor users, two hierarchical structures must be set up:

- **The resource group hierarchy:** Used to determine vendor users' visibility into partner information
- **The partner territory hierarchy:** Used to group partners hierarchically and to associate vendor users with partners

Partner users are set up differently from vendor users. Partner users are created as a result of self-registration, and then subsequently are assigned additional responsibilities through partner program membership. For a complete discussion of partner users, refer to Setting up the Partner Dashboard, page 6-1.

Understanding Vendor Users

Oracle Partner Management provides you with seeded responsibilities and roles that you use to create vendor users. In this guide, we provide information on setting up three basic types of vendor users:

Channel representative. A channel representative can be assigned to a partner's channel team. A channel representative can access all information about a partner if he is a member of its channel team.

Channel manager. The channel manager can also be assigned to a partner's channel team. Channel representatives "report" to channel managers, and a channel manager has visibility into her channel representatives' partner data even if she is not a member of the partners' channel teams.

Channel administrator. The channel administrator has access to Oracle Partner Management's administration pages and flows.

Creation of each type of vendor user is accomplished by assigning specific responsibilities and roles, which are described in the next section. While reading this chapter, please keep in mind that our intention is to provide you with enough understanding of Oracle Partner Management users to allow you to create users that meet your organization's business requirements. If you are using additional Oracle applications, your organization's users might require additional responsibilities, roles, and permissions.

Understanding Responsibilities, Roles, and Permissions

Setting up vendor users in Oracle Partner Management involves assigning responsibilities, resource roles, and permissions-based roles.

Responsibilities

Responsibilities are used across the Oracle E-Business Suite to give access to applications. When a responsibility is assigned to a user, it gives the user access to specific business flows, functions, and database tables. Responsibilities provide a way to implement security, as they control the information a user can see. Responsibilities are seeded for specific applications, and within an application, different responsibilities can provide a basis for creating different types of application users.

To assign a responsibility to a vendor user, first set up the user as an employee in the HRMS application, and then create a user name and password for the employee. The responsibility is then assigned to the user.

Oracle Partner Management seeds the Channel Manager and Channel Administrator responsibilities:

- The Channel Manager responsibility is assigned to both channel managers and channel representatives.
- The Channel Administrator responsibility is assigned to channel administrators. Note that, in addition to the Oracle Partner Management responsibility, a channel administrator needs to be able to access numerous other Oracle applications. Refer to *Creating a Channel Administrator*, page 4-8 for a list of the responsibilities that you might need to assign to a channel administrator.

Resource Roles

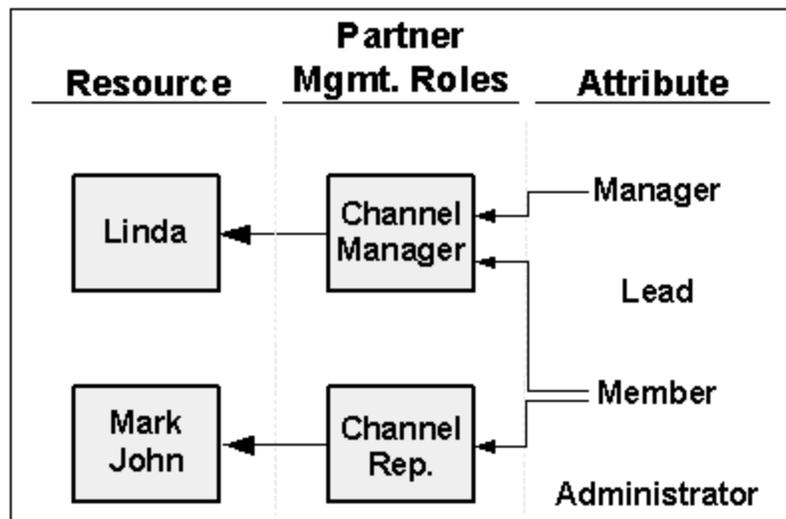
Oracle's CRM resource applications use resource roles to assign privileges to users and to control security.

In the CRM architecture, resources are people who are identified by the business function they perform. CRM resources include employees, parties, partners, and supplier contacts. In Oracle Partner Management, a vendor user is considered an employee resource.

A resource is assigned one or more roles. A resource role is a descriptive category that can encompass one or more job descriptions and job titles (for example, Channel Manager or Vendor Administrator). A resource role is associated with a role type, which is a collection of roles associated with a particular CRM application. Partner Management is a role type, as are Marketing and Sales Compensation. Both roles and role types are seeded per application.

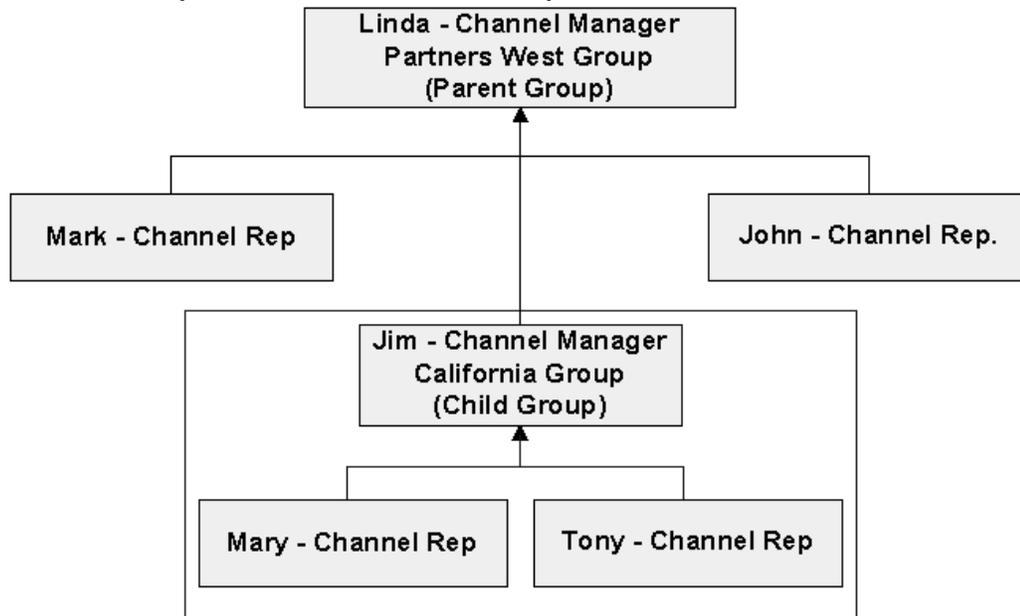
Each role is associated with one or more attributes. A role's attributes are defined when the role is created. The attributes assigned to a role help to further define the role. There are four attributes: Member, Lead, Administrator, and Manager.

Relationship Between Resources, Roles, and Attributes



A resource role is associated with a resource group, and resource groups are used to build a resource group hierarchy. In Oracle Partner Management, the resource group hierarchy is used to associate channel representatives with channel managers, who are subsequently able to view information about their channel representatives' partners. A resource group hierarchy can include parent-child relationships, as illustrated in the following figure. Thus, you can extend a channel manager's visibility by adding child groups to her group.

Resource Groups with Parent/Child Relationships



When you assign a user to a resource group, you give the user a role within the group. The group roles available for a particular user within a resource group are determined by the resource roles you have granted her. For example, to add resource Linda Jones to a resource group with a Channel Manager group role, you first must give her the Channel Manager resource role.

Oracle Partner Management uses three resource roles: Channel Manager, Channel Representative, and Vendor Administrator:

- The Channel Manager and Channel Representative roles are used to assign vendor users to channel teams and to control visibility into partner information.
- The Vendor Administrator role is used to designate a user as an enrollment request superuser, as it allows the user to see all Oracle Partner Management-related enrollment requests without being designated as a request approver.

Permissions-Based Roles

CRM applications also use permissions-based roles. In Oracle Partner Management, permissions-based roles allow you to control a user's security at a granular level, because a permission generally gives a user access to a specific bit of functionality. For example, you give a user the ability to invite an organization to become a partner by granting him the PV_INVITE_NEW_PARTNERS permission.

Permissions-based roles can be thought of as containers for permissions. Although you can not create a permission, you can create a permission-based role, and associate one or more permissions with the role.

Oracle Partner Management provides you with three seeded permissions-based roles:

- CHANNEL_MANAGER - contains the PV_INVITE_NEW_PARTNERS permission.
- CHANNEL_ADMIN_UPDATE - contains the PV_UPDATE_ALL_PARTNERS permission

- CHANNEL_ADMIN_VIEW - contains the PV_VIEW_ALL_PARTNERS permission

The following table lists all the permissions that are used by the Oracle Partner Management application. You can assign the permissions to one of the seeded Oracle Partner Management roles, or create a new role.

Permissions Used by Oracle Partner Management

Permission	Description
PV_INVITE_NEW_PARTNERS	Allows a user to invite a partner to join a partner program. A user with this permission sees the Invite New Partner button on his Partners page.
PV_UPDATE_ALL_PARTNERS	Allows a user to view and update all partners in the system and to create a partner list. A user with this permission sees the Create as List button on his Partners page.
PV_VIEW_ALL_PARTNERS	Provides a user with a read-only view of all the partners in the system.
OZF_SPECIAL_PRICING_SUPERUSER	Allows a user to view, update, and approve special pricing requests.
OZF_SPECIAL_PRICE_DQM	Identifies a user as the Data Quality Management (DQM) approver for special pricing. The DQM approver can search for similar special pricing requests and link them.
OZF_FUND_REQUEST_SUPERUSER	Allows a user to view, update, and approve partner fund requests.

Creating a Vendor User

This section provides basic procedures for setting up a vendor user. As they are written, the procedures describe how to create a user who is a channel manager. By assigning the appropriate responsibilities and roles, you can also use these procedures to create a channel representative and a channel administrator.

Creating a vendor user involves the following steps, which are described in this section:

1. Creating an employee
2. Creating a user and assigning responsibilities
3. Importing the employee as a resource into CRM
4. Assigning resource roles and a resource group
5. Assigning permissions-based roles

The following table lists other Oracle application guides that you can refer to for additional information about the vendor creation tasks in this section.

Additional Documentation

Procedure	Guide
Creating an Employee Creating a User and Assigning Responsibilities	<i>Using Oracle HRMS - The Fundamentals</i>
Importing the Employee into CRM Assigning Resource Roles and Resource Groups Assigning Permissions-Based Roles	<i>Oracle Common Application Components Implementation Guide</i>

Creating an Employee

Employees are added to the Oracle Human Resources Management System (HRMS).

Navigation

Log on to Oracle Forms with the HRMS Manager responsibility and navigate to People > Enter and Maintain. When the Find window appears, click New.

Prerequisites

None.

Notes

- **Action:** Select Create Employment.

Creating a User and Assigning Responsibilities

An employee must be assigned a user name, because responsibilities are assigned to the employee's user name. The employee will use the user name when she logs in to Oracle applications.

Navigation

Log on to Oracle Forms with the System Administrator responsibility, and navigate to Security > User > Define.

Prerequisites

The employee has been created.

Notes

- **Person:** Use the LOV to find the employee created previously.
- **User Name:** Create a user name for the employee.
- **Password:** Enter an initial password for the user, and press Enter. Re-enter the password, and press Enter again.
The user will be prompted to enter a different password the first time she logs on.
- **Responsibility:** Use the LOV to select Channel Manager as the responsibility. The Application, Security Group, and From fields are populated automatically.

Importing the Employee as a Resource into CRM

Before you can assign resource or permissions-based roles to an employee, she must be imported into the CRM applications. In this procedure, you search for an employee and then import her into CRM.

Navigation

Log on to Oracle Forms with the CRM Administrator responsibility, and navigate to Resource Manager > Maintain Resources > Import Resources to access the Select Resources to Import window.

Prerequisites

The employee must have been created and assigned a user name and responsibilities.

Steps:

1. Select Employee from the Resource Category list.
2. In the Name field, use the search to find the employee's name.
3. Click **Search**. Employee information appears in the Search Results table.
4. Select the correct employee from the table, and click **Start Import**.
The Set Resource Attributes window appears.
5. Click **OK**.
The Review and Import Selected Resources window appears.
6. Select the employee and click **Save Resource**.
7. Click **Details** to view the resource information for the employee.

Assigning Resource Roles and a Resource Group

In this procedure, you assign an Oracle Partner Management role to the newly created resource, and then assign the resource to a user group and give the resource a role in the group.

Navigation

Log on to Oracle Forms with the CRM Administrator responsibility, and navigate to Resource Manager > Maintain Resources > Resources to access the Find Resources window, and search for the resource you added in the previous procedure. When you have located the resource, the Resource window appears, displaying the resource information.

Prerequisites

The employee must have been imported as a resource into CRM

Steps:

1. In the Resources table, use the LOV to select Partners Relationship Management as the Role Type.
2. Use the Role LOV to select Channel Manager as the role.
3. Click the Groups tab.
4. In the Groups region, select a resource group name from the LOV.
5. In the Group Member Roles region, enter the resource's role in the group.

The roles available for the resource are determined by the roles you granted the resource in step 2. In this example, since you assigned the Channel Manager role only, Channel Manager appears in the Name field automatically.

Note that there are four checkboxes beside the resource name field: Manager, Admin, Member, and Lead. These boxes provide you with information about the role in the group; you can not modify the boxes.

Assigning Permissions-Based Roles

In this procedure, you assign an Oracle Partner Management permissions-based role to a user.

Navigation

Log in to the self-service application with the CRM HTML Administration responsibility and navigate to Setup > Users > Registration. At the search page, enter the user name, the employee's first name, or the employee's last name to search for the employee.

Prerequisites

The employee has created in the system.

Steps:

1. Click the name of the user to display the User Details page.
2. Click **Roles** to display the User-Role Mapping page.
3. Add PV_CHANNEL_MANAGER to the user's Assigned Roles list.

Creating a Channel Administrator

To properly set up and administer Oracle Partner Management, the channel administrator needs access to other Oracle applications and functions. This section lists all the responsibilities a channel administrator might need, depending on implementation requirements. If a channel administrator will also be a channel manager or channel representative, Oracle Partner Management resource roles and permissions-based roles need to be assigned as well.

Channel Administrator Responsibilities

Responsibility	Description
Application Developer	Allows a user to create and modify lookups.
Approvals Management Application Administration	Allows a user to create and modify approval rules and approval groups in Oracle Approvals Management. Oracle Approvals Management is used to control the approvals processes for partner program enrollment requests, special pricing requests, partner funds requests, deal registration requests, and lead referral requests.
Channel Administrator	Gives user access to the Oracle Partner Management administration pages and flows.
Channel Manager	Gives user access to Oracle Partner Management.

Responsibility	Description
Content Super User	Allows a user to access Oracle Content Manager. Oracle Content Manager is used to store content that is used in partner programs and the Partner Dashboard.
Contract Manager	Allows a user to access the Oracle Contract Manager application, which is used to create and store contracts associated with partner programs.
CRM Administrator	Allows a user to access Oracle Forms with Customer Relationship Management Administrator privileges and allows a user to create resources, resource groups, and the resource hierarchy. Also give a user access to the Oracle Territory Manager application.
CRM HTML Administration	Allows a user to access the HTML CRM administration pages, which are used to enable user types and create and manage permissions-based roles and assign permissions to roles.
CRM Resource Manager	Gives a user access to the CRM Resource Manager application, which is used to define, access, and maintain different categories of resources, and to create and manage resource roles and resource groups.
HRMS Manager	Gives a user access to the Human Resources Management application, which is used to create and manage employees in Oracle applications.
iStore Administrator	Gives a user access to iStore administration. The Partner Dashboard is set up and maintained through iStore.
Order Management Super User	Allows a user to access Oracle Order Management and to view and update orders.
Oracle Sales Administrator	Allows a user to access Oracle Sales, from which he can set up the report currency lookup and run the AS_PERIOD_DAYS table and the Refresh Multi-Currency Conversion Rate (AS_PERIOD_RATES) concurrent program to update currency exchange rates.
Oracle Trade Management User	Gives a user access to the Oracle Trade Management application. The channel administrator uses Oracle Trade Management to set up budgets, claims, offers, and approvers used in special pricing, partner funds, and lead referral registration.

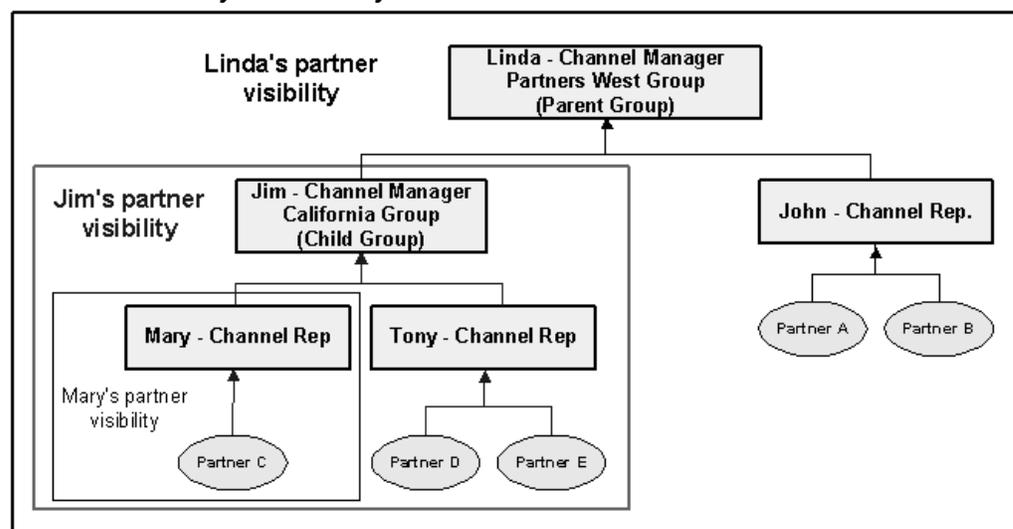
Responsibility	Description
System Administrator	Gives a user access to various Oracle application system administration functions, including creating users and assigning responsibilities and administering profile options and concurrent programs.
Trading Community Manager	Allows a user to access the Oracle Data Quality Management (DQM) application. DQM is used by special pricing, lead referral, and deal registration to identify potential duplicate customers and customer contacts. In addition, special pricing uses DQM to identify potential matches for special pricing requests.
Workflow Administrator Web Applications	Allows a user to access to Oracle Workflow Builder. Oracle Workflow Builder is used to send notifications for deal registration, partner fund, special pricing, and lead referral requests. Oracle Workflow Builder requires the Oracle 9i database.
Workflow User Web Applications	Allows a user to access Oracle Workflow, where the user can view approval requests for which she is an approver, and approve or deny requests.

Setting up Resource Groups and a Resource Group Hierarchy

As part of Oracle Partner Management implementation, you may need to set up resource groups and a resource group hierarchy. The resource group hierarchy allows you to create a virtual model of your indirect channel management organization and to control vendor users' visibility into partner information.

The following figure illustrates how the resource group hierarchy is used to control vendor users' visibility into partner information. The example contains two resource groups: Partners West and California. The California group is a child of the Partners West group. Each group has a Channel Manager and a Channel Representative. In both groups, the Channel Reps have access to information about their partners only. In the California group, Jim can see information about both Tony and Mary's partners, because he has the Channel Manager role. In the Partners West group, Linda can see John's partners because she has the Channel Manager role. In addition, Linda can see information about all the partners that members of the California group are assigned to, because the Partners West group is the California group's parent.

Resource Hierarchy and Visibility into Partner Information



Creating a Resource Group and the Resource Group Hierarchy

When you create a resource group, you specify members and roles that can be assigned to the group. You also define parent and child relationships for the group, which are the mechanisms by which the resource group hierarchy is developed.

Navigation

Log in to Oracle Forms with the CRM Administrator responsibility, and navigate to Resource Manager > Maintain Resources > Groups.

Steps:

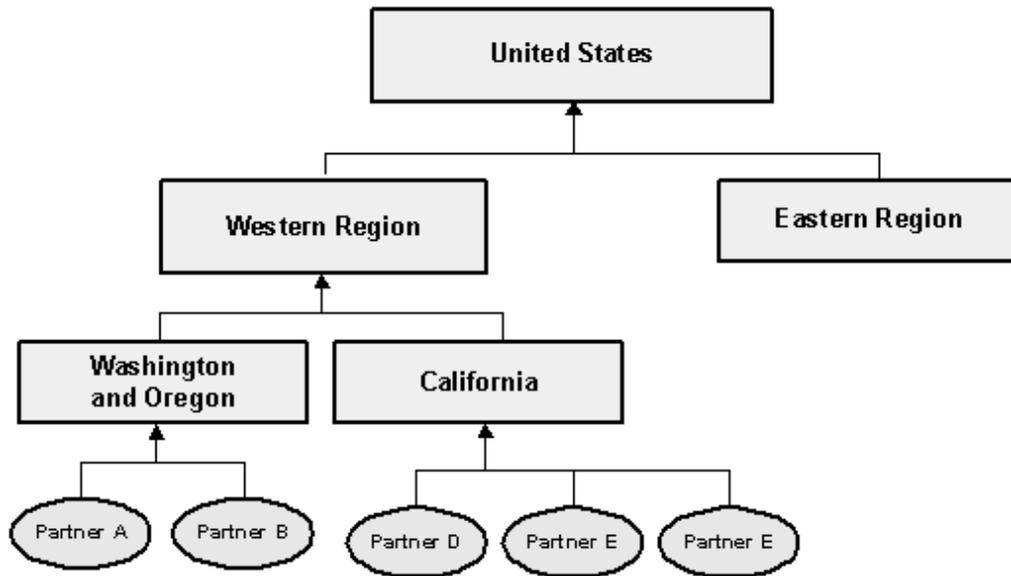
1. Click the Roles tab to define role types and roles to the group.
 - **Role Type:** Select Partners Management.
 - **Roles:** Add one or more of the roles available for the Partners Management role type.
2. Click the Parent Group tab to define one or more parent groups for the new group.
3. Click the child Group tab to define one or more child groups for the group.
4. Click the Used In tab to define the Oracle applications that will make use of the resource group.
5. Click the Members tab to add members to the group. Adding a member to a group is the equivalent of assigning a resource to a resource group (refer to Assigning Resource Roles and a Resource Group for more information).

Setting up a Partner Hierarchy

Oracle Partner Management uses a partner hierarchy to assign vendor users to partner channel teams. A partner hierarchy is created using the Oracle Territory Management application. When you create a partner territory hierarchy, you specify the qualifiers that you will use to define the territories, and then create each territory and assign resources (partners and vendor users) to it. For example, you could create a California territory that contains partners whose identifying address is in California. Then, you could associate

the California resource group with the California territory, thus adding the resources in the California group to the channel team of each partner located in the territory.

Example of a Partner Territory Hierarchy



Note that the example in the preceding figure is simplistic. In reality, an organization's territory hierarchy could contain numerous levels and include more than one country. Likewise, a territory hierarchy can be built around non-geographic information. For example, a territory could be built around partner information such as partner level or type.

Creating a Partner Territory Hierarchy

For instructions on creating a territory, refer to *Setting up Territories in Oracle Territory Management*, page 3-6.

Notes

- **Usage:** Select Oracle Partner Management as the territory usage for the hierarchy to indicate that the territory will be used to associate partners and channel teams.

Setting Up Partner Profile Attributes

This chapter covers the following topics:

- Overview
- Partner Profile Attributes
- Working with Attributes
- Viewing Profile Attribute Historical Information
- Setting Up Custom Attributes

Overview

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

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

Partner Profile Attributes

An attribute is a specific piece of information about an individual partner. Examples of partner attributes include a partner's geographic coverage, the number of opportunities a partner currently has open, and the number of referrals a partner has submitted year to date (YTD).

Attribute information can be collected from a partner program enrollment request, entered by a vendor or partner user, or calculated based on partner data and transactions.

Attribute information is used to create a profile for a partner, and is available from tabs on a partner's Partner Details page and View Trends page. Collectively, partner profile information is used to track key performance indicators that appear on the channel manager dashboard.

Oracle Partner Management provides you with a thorough set of seeded partner attributes, which are described in detail in the section, Seeded Attributes, page 5-2. In the application, a channel manager can view all the attributes from the Attributes Overview page. For a description of the information available on this page, refer to The Attributes Overview Page, page 5-11. A channel administrator can also create customized attributes, if needed, to meet her organization's needs. Refer to Setting up Custom Attributes, page 5-20 for additional information.

Seeded Attributes

Oracle Partner Management provides numerous seeded partner attributes. The seeded attributes track a variety of facts about a partner. For an individual partner, the attributes provide a thorough, up-to-date partner profile. Collectively, partner attributes are used to build a 360-degree view of a channel's performance.

Seeded attributes can be informational or performance based. Informational attributes provide information about a partner that is unlikely to change frequently, such as a partner's industry. Performance attributes provide current information about a partner's activities, and are updated by concurrent programs. Most seeded attributes are performance attributes.

Performance attributes can be cumulative or noncumulative. Cumulative attributes track information for a specific attribute over a period of time and help the vendor to track a partner's performance trends. For example, the attribute Opportunities Won YTD tracks the total number of indirect opportunities a partner has won during the current fiscal year. Noncumulative attributes provide information about a partner's current status. For example, the attribute Open Opportunities Count lists the number of opportunities that are open currently for a partner or partners. Currently, you can not create customized performance attributes.

There are three types of performance attributes:

- **Partner Performance Attributes:** Partner performance information appears in the Performance tab of the Partner Detail page. The Performance tab contains tables that provide information for specific partner attributes. For cumulative attributes, the year to date (YTD) totals are displayed. Taken in total, the attribute information provided on the tab provides a profile of a partner's current performance. Both cumulative and noncumulative performance attributes are used to track partner performance.

Partner performance information is calculated by the concurrent program PV - Refresh attribute text table, which populates the pv_search_attr_trends table.

- **Partner Trend Attributes:** Partner trend information appears in the View Trends page, which is accessed by clicking the View Trends button on the Performance tab on the Partner Details page. A partner trend attribute tracks a partner's performance for a particular attribute over a specific period of time. Cumulative performance attributes are used to track partner trends.

Partner trend information is calculated by the concurrent program PV: Refresh Partner Trend Values, which populates the pv_entity_attr_trends table.

- **Partner Group Performance Attributes:** Partner group performance information is used to populate the Key Metrics bin on a channel manager’s dashboard. The Key Metrics bin contains aggregated performance attribute information for all partners whose data the vendor employee can access (either through channel team membership or the employee’s role in a resource group). Both cumulative and noncumulative performance attributes are used to track partner group performance.

The data contained in the Key Metrics bin is populated by a query, which draws data from the pv_search_attr_trends table and other partner tables. The following table provides information about Oracle Partner Management seeded partner attributes.

Seeded Attributes

Attribute	Description	Category	Display Style	Enabled For
Additional Channel Offering	Additional services provided by the partner (Implementation specific)	General	Multi-Select	Performance Tab
Capacity Rating	Partner’s capacity rating (Implementation specific)	General	Drop-down	Performance Tab
Claims Paid	Total claim settlement amount paid for soft funds and special pricing request based on settlement date	Marketing	Currency	Trends Page
Claims Paid YTD	Total claim amount paid for soft funds and special pricing request based on settlement date during the current fiscal year	Marketing	Currency	Performance Tab
Country	Countries that the partner has a presence in	General	Multi-Select	Performance Tab
Customer Annual Revenue	Annual revenue of the partner as stored in TCA table	General	Currency	Performance Tab
Deals Accepted	Total deal amount accepted based on deal creation date	Sales	Currency	Trends Page

Attribute	Description	Category	Display Style	Enabled For
Deals Accepted Count	Total number of deals accepted based on deal creation date	Sales	Numeric	Trends Page
Deals Accepted YTD	Total deal amount accepted based on deal creation date during the current fiscal year	Sales	Currency	Performance Tab, Key Metrics Bin
Deals Close Rate	Deals Closed Count/Deals Accepted Count	Sales	Percentage	Performance Tab
Deal Closed	Amount of total number of closed opportunities, based on the date the deal status changes to 'Closed. Opportunity Won'	Sales	Currency	Trends Page
Deals Closed Count	Total number of closed opportunities based on the date the deal status changes to 'Closed. Opportunity Won'	Sales	Count	Trends Page
Deals Closed YTD	Amount of total number of closed opportunities, where the deal status changes to 'Closed. Opportunity Won' during the current fiscal year	Sales	Currency	Performance Tab
Deals Submitted Count	Total number of deals that are not in draft status based on deal creation date	Sales	Count	Trends Page

Attribute	Description	Category	Display Style	Enabled For
Deals Submitted YTD Count	Total number of deals that are not in draft status based on deal created during the current fiscal year	Sales	Count	Performance Tab
Deals accepted YTD count	Total number of deals accepted based on deal created during the current fiscal year	Sales	Count	Performance Tab, Key Metrics Bin
Functional Expertise	Partner expertise with regards to vendor product or service offering	General	Multi-Select	Multi-Select
Funds Paid	Total settlement amount paid for fund requests based on the settlement date	Marketing	Currency	Trends Page
Funds Paid YTD	Total settlement amount paid for fund requests based on settlement date during the current fiscal year	Marketing	Currency	Performance Tab, Key Metrics Bin
Funds Requested	Total amount requested for fund requests based on the submitted date	Marketing	Currency	Trends Page
Funds Requested YTD	Total amount requested for fund requests based on the submitted date during the current fiscal year	Marketing	Currency	Performance Tab, Key Metrics Bin
Geographic Coverage	Partner's Geographic Coverage (Implementation specific)	General	Multi-Select	Performance Tab

Attribute	Description	Category	Display Style	Enabled For
Inactive Partners	Total number of active partners that have not placed an order (where partner is the 'sold-to') in the time span specified by the profile ' PV: Inactive Partners Time Window'	General	Count	Key Metrics Bin
Indirect Sales	Total amount based on the transaction date. This information is captured by Oracle Trade Management from the Point-of-Sale system	Sales	Currency	Trends Page
Indirect Sales Prior year	Total amount based on transaction date during last fiscal year. This information is captured by Oracle Trade Management from the Point-of-Sale system	Sales	Currency	Performance Tab
Indirect Sales YTD	Total amount based on transaction date during the current fiscal year. This information is captured by Oracle Trade Management from the Point-of-Sale System	Sales	Currency	Performance Tab, Key Metrics Bin
Industry	Partner's Industry (Implementation specific)	General	Multi-Select	Performance Tab
Last Order Date	Date of the last order where partner is the 'Sold to' party base on last ordered date	Sales	Date	Performance Tab

Attribute	Description	Category	Display Style	Enabled For
New Partners	Total number of partners created in the time span specified by the profile ' PV: New Partners Time Window'	General	Count	Key Metrics Bin
Open Claims	Total amount remaining for all open claims generated from referral, soft funds and special pricing	Marketing	Currency	Performance Tab, Trends Page, Key Metrics Bin
Open Opportunities	Total amount of open indirect opportunities that a partner is working on	Sales	Currency	Performance Tab, Trends Page, Key Metrics Bin
Open Opportunities Count	Total number of open indirect opportunities that a partner is working on	Sales	Count	Performance Tab, Trends Page, Key Metrics Bin
Opportunities Won	Total amount of indirect opportunities that a partner has won based on decision date	Sales	Currency	Trends Page
Opportunities Won Prior year	Total amount of indirect opportunities that a partner has won based on decision date during the last fiscal year	Sales	Currency	Performance Tab
Opportunities Won YTD	Total amount of indirect opportunities that a partner has won based on decision date during the current fiscal year	Sales	Currency	Performance Tab

Attribute	Description	Category	Display Style	Enabled For
Opportunity Acceptance Rate	Number of opportunities accepted by partner or the number of opportunities offered to partner	Sales	Percentage	Performance Tab, Key Metrics Bin
Opportunity Close Rate	Number of opportunities won by the partner or the number of opportunities accepted by the partner	Sales	Percentage	Performance Tab, Key Metrics Bin
Partner Enrollment Date	Partner enrollment date	General	Date	Performance Tab
Partner Level	Partner level (Implementation specific)	General	Drop-Down	Performance Tab
Partner Member Type	Partner member type (Standard, Global, Subsidiary)	General	Radio Button	Performance Tab
Partner Name	Partner Name	General	Text	Performance Tab
Partner Type	Partner type (End user, Original Equipment Manufacturer, Prospect, Distributor, Reseller). Users can define additional types	General	Check Box	Performance Tab
Partnership Activity	Partnership Activity (Implementation specific)	General	Multi-Select	Performance Tab
Product Categories for Special Pricing	Product categories that a partner is authorized to submit special pricing requests for (Implementation specific)	General	Multi-Select	Performance Tab

Attribute	Description	Category	Display Style	Enabled For
Products Bought Last Year	List of products bought by the partner in the last twelve months. (from the current date) This is captured by taking union of products on all orders shipped last year where Partner is the 'Bill to' party	Sales	List	Performance Tab
Products Sold Last Year	List of all products sold by the partner in the last twelve months. (from the current date) This metric is calculated by taking union on products on all line items maintained in the POS table against the given partner	Sales	List	Performance Tab
Referral Commission Paid	Total commission amount paid based on the date the referral status changes to 'Closed. Fee Paid'	Marketing	Currency	Trends Page
Referral Commissions Paid YTD	Total commission amount paid based on the date the referral status changes to 'Closed. Fee Paid' during the current fiscal year	Marketing	Currency	Performance Tab, Key Metrics Bin
Referrals Accepted	Total referral amount accepted based on referral creation date	Marketing	Currency	Trends Page
Referrals Submitted Count	Total number of referrals that are not in draft status based on referral creation date	Marketing	Count	Trends Page

Attribute	Description	Category	Display Style	Enabled For
Referrals accepted YTD	Total referral amount accepted based on referral creation date during the current fiscal year	Marketing	Currency	Performance Tab, Key Metrics Bin
Referrals accepted YTD count	Total number of referrals accepted based on referral creation date during the current fiscal year	Marketing	Count	Performance Tab, Key Metrics Bin
Referrals submitted YTD count	Total number of referrals that are not in draft status based on referral creation date during the current fiscal year	Marketing	Count	Performance Tab
Sales	Total amount of all orders shipped where a partner is the 'sold-to' party, based on the order date	Sales	Currency	Trends Page
Sales Prior Year	Total amount of all orders shipped where a partner is the 'sold-to' party, based on order date during the prior fiscal year	Sales	Currency	Performance Tab
Sales YTD	Total amount of all orders shipped where a partner is the 'sold-to' party based on order date during the current fiscal year	Sales	Currency	Performance Tab, Key Metrics Bin

Attribute	Description	Category	Display Style	Enabled For
State	States that the partner has a presence	General	Multi-Select	Performance Tab
Total Partners	Total number of partners managed	General	Count	Key Metrics Bin

The Attributes Overview Page

A vendor user with the Channel Administrator responsibility can access the Attributes Overview page. The Attributes Overview page displays all the attributes that can be associated with a partner. On the page, seeded attributes are indicated with an asterisk (*).

The following table describes the information that appears on the Attributes - Overview page.

Attribute Information

Column	Description
Profile Attribute Name	The name of the attribute. Seeded attribute names can not be modified.
Attribute Type	Indicates how the attribute's data is populated. Three attribute types are available: list of values, text box, and derived. <ul style="list-style-type: none">List of values. A value is selected from a range of values that the vendor sets up. Refer to Setting up an Internal List of Values, page 5-16 for more information on lists of values and attributes.Text box. Data is entered a user.Derived. Data is populated by an SQL query or database function.
Display Style	For attributes with a type of text box, derived, or list of values, the display status indicates the information type of the attribute. For attributes with a type of list of values, the display style is flexible, and can be set up according to a vendor's business requirements. Refer to Setting up Attribute Display Styles, page 5-16 for additional information.
Category	The functional category of the attribute. Refer to Setting up Attribute Categories, page 5-16 for additional information.
Attribute Values	The View Values link appears in this column if the attribute has an internal List of Values associated with it. Click View Values to access the Attribute Details page, from which you can set up or modify an attribute's list of values.
Refresh Frequency	The frequency with which the attribute is updated by the appropriate concurrent program. Refer to Setting up Refresh Frequency for additional information.
Remove	Select to remove an attribute. You can remove attributes for which no data has been collected.
Inactivate	Select to disable the attribute in the application. When you attempt to make an attribute inactive, the application performs a check to determine if the attribute is used in partner program eligibility or opportunity rules; if the attribute is being used, you can not inactivate it until you first remove it from the rule or eligibility requirements.

Lists of Values for Seeded Attributes

Many attributes are associated with a list of values. For many of the seeded attributes, and for some derived custom attributes, the list of values is populated from a Lookup or an external table. The list of values for other attributes can be set up by a channel administrator. If a list of values can be set up internally, a View Values link appears in the attribute's Attribute Values column. Refer to Setting up an Internal List of Values, page 5-16 for more information.

The following table lists the seeded attributes that are associated with a list of values, and indicates the list of values source and additional information. The source can be the name of a Lookup, a SQL statement, or Internal if the list of values is created from within Oracle Partner Management.

Sources for Lists of Values for Seeded Attributes

Attribute	Display Style	List of Values Source	Enabled For
Functional Expertise	Multi-Select	ENI_PROD_ DEN_HRCHY_ PARENTS_V WHERE PURCHASE_ INTEREST = 'Y' AND (DISABLE_DATE IS NULL OR DISABLE_ DATE > SYSDATE)	Partner
Product Categories for Special Pricing	Multi-Select	ENI_PROD_ DEN_HRCHY_ PARENTS_V WHERE PURCHASE_ INTEREST = 'Y' AND (DISABLE_DATE IS NULL OR DISABLE_ DATE > SYSDATE)	Partner
Partner Type	Check Box	INTERNAL	Partner
Country	Multi-Select	FND_TERRITORIES_ VL	Partner, Opportunity
Industry	Multi-Select	LOOKUP (PRM_ IND_CLASSIFICAT ION_TYPE)	Partner, Opportunity
Partner Member Type	Radio Button	INTERNAL	Partner
Geographic Coverage	Multi-Select	INTERNAL	Partner, Opportunity
Additional Channel Offering	Multi-Select	INTERNAL	Partner, Opportunity
Partnership Activity	Multi-Select	INTERNAL	Partner, Opportunity

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

Attribute	Display Style	List of Values Source	Enabled For
Win Probability	Drop Down	AS_FORECAST_PROB_ALL_VL WHERE ENABLED_FLAG = 'Y' AND ((SYSDATE BETWEEN START_DATE_ACTIVE AND END_DATE_ACTIVE) OR (SYSDATE > START_DATE_ACTIVE AND END_DATE_ACTIVE IS NULL))	Opportunity
Sales Methodology	Drop Down	AS_SALES_METHODODOLOGY_VL WHERE SYSDATE BETWEEN START_DATE_ACTIVE AND NVL(END_DATE_ACTIVE, SYSDATE)	Opportunity
Customer/Account Type	Drop Down	LOOKUPS (CUSTOMER_ACCOUNT_TYPE)	Opportunity
Routing Status	Drop Down	LOOKUPS (PV_ROUTING_STAGE)	Opportunity
Customer Category	Drop Down	AR_LOOKUPS WHERE LOOKUP_TYPE = 'CUSTOMER_CATEGORY' AND ENABLED_FLAG = 'Y'	Opportunity
Products Bought Last Year	Multi-Select	MTL_SYSTEM_ITEMS_B WHERE ORGANIZATION_ID = FND_PROFILE.VALUE('ORG_ID')	Partner
Products Sold Last Year	Multi-Select	MTL_SYSTEM_ITEMS_B WHERE ORGANIZATION_ID = FND_PROFILE.VALUE('ORG_ID')	Partner

Working with Attributes

A channel administrator may need to perform the following tasks, either during implementation or as on-going administrative tasks:

- Setting up Attribute Categories
- Setting up Attribute Display Styles
- Setting up an Internal List of Values

- Setting up Refresh Frequency
- Refreshing Attribute Values with Concurrent Programs

Setting up Attribute Categories

Attributes can be organized into different functional categories: General, Marketing, PRM, Resource, or Sales. The categories are used to group attributes on Profile, Performance, and Opportunity tabs on the Partner Details page.

A vendor user can set up additional categories either during or after implementation. Additional attribute categories are added through Oracle Forms, by adding new lookup values to the lookup type Attribute Categories (PV_ATTRIBUTE_CATEGORY_TYPE).

Setting up Attribute Display Styles

An attribute's Display Style indicates the type of control that will be used to provide information about the attribute. An attribute's Display Style is determined by its Attribute Type. Most of the seeded attributes with an Attribute Type of List of Values have flexible Display Styles, which can be set up by the channel administrator according to business requirements.

Depending on the drop-down list associated with the attribute, the channel manager can select one of two Display Style controls:

- Multiselect or check box
- Radio button or drop-down list

When a channel administrator creates a custom attribute, she indicates both the attribute type and display style. For more information, see *Setting up Custom Attributes*, page 5-20.

Setting up an Internal List of Values

When the View Values link is available for an attribute, a channel administrator can set up an internal list of values for the attribute. Click the View Values link to access the Attributes - Overview page and set up populate an attribute's internal list of values.

Notes

- **Description:** How the attribute appears in the list.
- **Inactive:** Select to prevent the attribute from appearing in the list.

Setting Up Refresh Frequency

Attributes that track partner performance and trends need to be refreshed periodically. You set up an attribute's refresh frequency from the Attribute Details - Properties page, which is accessed by clicking the Refresh Frequency link for an attribute. The refresh frequency is subsequently used by concurrent programs to update an attribute's information.

How frequently a specific attribute should be refreshed depends on business requirements. You can specify that an attribute be refreshed hourly, daily, weekly, or monthly:

- Hour - Refresh if the last refresh exceeds the specified number of hours.

- Day - Refresh if the last refresh exceeds the specified number of days.
- Week - Refresh if the last refresh occurred before the specified number of weeks. It is important to note that one week does not always equal seven days. For example, if the refresh frequency was set to one week, and the last refresh occurred on Friday, if the concurrent program runs on Monday the attribute will be refreshed again because the week has changed.
- Month - Refresh if the last refresh occurred before the specified number of months.

When setting up a refresh frequency, you should also take into consideration whether or not an attribute's value is derived from, and thus dependent upon, another attribute. For information on attribute refresh dependencies, refer to Understanding Performance Attribute Refresh Dependencies.

Attributes for which you have not assigned a refresh frequency are refreshed whenever the concurrent programs run.

Understanding Performance Attribute Refresh Dependencies

Many of the partner performance and partner group performance attributes derive their values from other attributes. Specifically, many of the partner performance attribute values are derived from partner trend measures, while many of the partner group performance attribute values are derived from partner performance attributes.

When an attribute is dependent upon another attribute for its value, the other attribute must be refreshed before the dependent attribute can be updated successfully. You must understand attribute dependencies to properly set up refresh values. The following table maps the dependencies between the three types of performance attributes.

Performance Attribute Refresh Dependencies

Partner Group Measure	Depends on Partner Measure	Depends on Partner Trend Measure
Open Opportunities Count	Open Opportunities Count	Open Opportunities Count
Open Opportunities	Open Opportunities	Open Opportunities
Sales YTD	Sales YTD	Sales
Indirect Sales YTD	Indirect Sales YTD	Indirect Sales
Opportunity Close Rate	Opportunity Close Rate	--
Opportunity Acceptance Rate	Opportunity Acceptance Rate	--
Referral Commissions Paid YTD	Referral Commissions Paid YTD	Referral Commission Paid
Referrals Accepted YTD	Referrals Accepted YTD	Referrals Accepted
Referrals Accepted YTD Count	Referrals Accepted YTD Count	--
Deals Accepted YTD Count	Deals Accepted YTD Count	Deals Accepted Count
Deals Accepted YTD	Deals Accepted YTD	Deals Accepted

Partner Group Measure	Depends on Partner Measure	Depends on Partner Trend Measure
Funds Requested YTD	Funds Requested YTD	Funds Requested
Funds Paid YTD	Funds Paid YTD	Funds Paid
Open Claims	Open Claims	Open Claims
--	Sales Prior Year	Sales
--	Indirect Sales Prior Year	Indirect Sales
--	Opportunities Won YTD	Opportunities Won
--	Opportunities Won Prior Year	Opportunities Won
--	Referrals Submitted YTD Count	Referrals Submitted Count
--	Deals Close Rate	Deals Closed Count divided by Deals Accepted Count
--	Deals Closed YTD	Deals Closed
--	Deals Submitted YTD Count	Deals Submitted Count
--	Claims Paid YTD	Claims Paid
Total Partners	--	--
New Partners	--	--
Inactive Partners	--	--

Refreshing Attribute Values with Concurrent Programs

The refresh frequency value is used by one of two concurrent programs to determine whether or not an attribute needs to be updated.

- PV: Refresh Partner Trend Values - This program calculates the partner trend performance measures summarized at a monthly level.
- PV: Refresh Attribute Text Table - This program calculates the performance and derived attributes for each partner and allows the attribute details for a particular partner to be used in the matching process.

There are two options for running this program - Full Refresh or New Partners Only. The Full Refresh option is the default option. The New Partners Only option picks up all the newly created partners since the last refresh of this type. The last refresh date is stored in the profile PV: Refresh Search Attributes Last Update Date.

The following table provides the parameters of the PV: Refresh Partner Trend Values concurrent program.

PV: Refresh Partner Trend Values Parameters

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

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

The following table provides the parameters of the PV: Refresh Attribute Text Table concurrent program.

PV: Refresh Attribute Text Table Parameters

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

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

Viewing Profile Attribute Historical Information

A vendor user can view historical information about an attribute. The historical information includes a record of the changes made to an attribute and a snapshot of a partner's profile for a specified date.

Viewing Attribute Change History

Partner profile attributes are frequently updated by users or concurrent programs. You can view an attribute's change history to determine what changes have been made to the attribute, who made the changes, and when they were made.

To view an attribute's change history, navigate to a partner's Partner Details page, and click the Profile tab. Navigate to a the attribute's category, click the View History button, and then select the attribute from the drop-down list that appears.

Viewing a Partner Profile Snapshot

The partner profile snapshot provides you with a partner's profile values for a specific historical date. A profile snapshot allows a user to compare a partner's current profile with a past profile.

To view partner profile snapshot, navigate to a partner's Partner Details page, and click the Profile tab. In the Values as Of field, enter a date. The profile values will be updated to reflect the partner's profile as of the date entered.

Setting Up Custom Attributes

A channel administrator can create custom attributes to track additional information about partners. Customized attributes can be used to gather information about a partner or to derive information from other sources through SQL statements and database functions.

Navigation

Log on with the channel administrator responsibility, navigate to the Attributes Overview page, and click the Create button that appears on the Attributes - Overview page to access the Create Attribute page.

Notes

- **Attribute Type:** Select Text Box, List of Values, or Derived. The attribute type determines the options that will be available in the Display Style drop-down list. Subsequently, the Display Style further determines what additional information must be provided for an attribute.
- **Status:** Selecting Active makes the attribute visible in the application.
- **Expose to Partner:** Makes the attribute visible to partners from their profiles. Not selecting this option for an attribute makes it visible to vendor users only.
- **Requires Data Validation:** Selecting this attribute indicates that updates made to the attribute must be approved. When an update is made to the attribute for a specific partner, an email notification is sent to the channel manager(s) for the partner informing him of the change. In addition, the validation history for the attribute is tracked for the attribute for each partner.

Two icons appear beside an attribute that requires validation. One icon takes a user to the Validation Information page, which allows the user to provide notes or documentation to support the change. The other icon takes a user to a page that displays the attribute's validation history.

- **Related To:** Enables the attribute for use in specific areas of the application. All the following options are available for Text Box and List of Values attributes; for a Derived attribute, only the Partner and Opportunity options are available.

- **Partner:** Makes the attribute visible on Partner Details pages. The section or tab that the attribute appears in is determined by the Category selection.
- **Lead Referral:** Select to enable the attribute for use when creating questions associated with a Referral benefit. When a partner user submits a referral, the answers she provides are used to update the partner's profile.
- **Partner Contact:** Select this option to display the attribute on partner contact pages.
- **Deal Registration:** Select to enable the attribute for use when creating questions associated with a Deal Registration benefit. When a partner user submits a deal registration, the answers she provides are used to update the partner's profile.
- **Opportunity:** Select this options to associate the attribute with opportunities. The attribute will appear on opportunity pages.
- **Countries:** Associates an attribute with one or more countries. When a country is selected for an attribute, the attribute is available for partners whose identifying address matches the country. More than one country can be selected for an attribute. The default is All.
- **Partner Types:** Select one or more partner types to limit the attribute to specific types of partners, or select All to use the attribute for all partners.
- **Enabled for Locator:** Select to include an attribute in the Partner Locator. Enabling an attribute for the Partner Locator allows a potential customer to use the attribute to search for a partner.
- **Enabled for Matching Services:** Select to enable an attribute to be used in the following areas:
 - **Opportunity Matching:** Enabling an attribute for matching services enables it to be used for automatic and manual opportunity matching. Note that you also need to select Related To: Opportunity for the attribute to be available for opportunity matching.
 - **Partner Program Requirements:** Enabling an attribute for matching also makes it available for use as a requirement for a partner program.

The following table lists all the attribute types and display styles available for custom attributes. The table also provides additional information for those attributes and display styles that require additional information during set up.

Attribute Types and Display Styles

Attribute Type	Display Style	Additional Information for Attribute
List of Values	Check Box	No
	Multi Select	Enter the number of lines to be included in the list.
	Percentage	By default, the percentage values must add up to 100%. To change the percentage total, modify the profile value PV: Attribute Percentage Total.
	Radio Button	No
	Drop Down	No
Text Box	Currency	Decimal points: Number of decimal points used for rounding. Character Width: number of characters allowed in the text box. Value Type: Used to evaluate attribute during opportunity matching. Specify Minimum or Maximum.
	Date	Value Type: Used to evaluate attribute during opportunity matching. Specify Minimum or Maximum.
	Numeric	Decimal points: Number of decimal points used to round amounts. Value Type: Used to evaluate attribute during opportunity matching. Specify Minimum or Maximum.
	Text	Number of lines: The number of lines to be allowed in the text box. Character Width: The number of characters allowed in the text box.

Attribute Type	Display Style	Additional Information for Attribute
Derived	Currency	No
	Date	No
	Numeric	Value Type: Used to evaluate attribute during opportunity matching. Specify Minimum or Maximum.
	Text	No
	List of Values	No
	Percentage	Value Type: Used to evaluate attribute during opportunity matching. Specify Minimum or Maximum.

Creating a Derived Attribute

Creating a derived attribute involves providing “code” that is used to populated attribute values. A derived partner profile attribute can be populated by a PL/SQL stored procedure or package, or by a SQL statement. A user-defined SQL statement is used to populate the list of values that is associated with an attribute with List Of Values value type.

Coding for derived attributes is done in the Derived Attribute Properties section of the Attribute Detail page. This section appears when you click Create after providing the attribute’s initial details.

Notes

- **LOV Lookup SQL:** If List Of Values was selected as the attribute’s value type, this field appears, and contains a sample SQL statement. The user changes the SQL statement to generate the desired list of values.
- **Value Type:** If numeric or percentage was selected as the attribute’s value type, this field appears. Value type is used to evaluate the attribute during opportunity matching. Select Minimum to indicate that the attribute with the lowest value wins; select Maximum to indicate that the attribute with the highest value wins.
- **Enabled For:** Indicates the areas of the application to which the attribute will apply. If multiple areas are selected, a different function can be created for each.
- **Function Name:** The function name and code. A function is actually a PL/SQL package. The package and procedure must exist in the database. The function name for the attribute must follow the following format: `<procedure-name>(:party_id, :output)`
- **Validate:** Click to check a SQL statement’s syntax or to check a function’s syntax and to validate that the function appears in the database.

Example: Populating a Derived Attribute with a Stored Procedure

Derived attributes support all the return types that are currently supported by Oracle Applications: currency, date, null_check, number, and string.

Currently, the following procedure template is supported. The procedure expects an IN parameter of NUMBER type and an OUT parameter of JTF_VARCHAR2_TABLE_4000 type:

```
PROCEDURE <procedure-name>
(
  p_partner_id NUMBER,
  x_output OUT JTF_VARCHAR2_TABLE_4000
)
IS
<declarations>
BEGIN
  x_output := JTF_VARCHAR2_TABLE_4000();
  <logic to derive the output values and store them in x_output table>
END;
```

The following is an example of a procedure that would be used to create an attribute that calculates a partner's actual revenue:

```
PROCEDURE Partner_Revenue
( p_partner_id NUMBER,
  x_assigned_count OUT JTF_VARCHAR2_TABLE_4000 )
IS
  CURSOR lc_count IS
    SELECT orgp.curr_fy_potential_revenue annual_revenue
    FROM apps.pv_partner_profiles PV, apps.hz_organization_profiles orgp
    WHERE orgp.curr_fy_potential_revenue IS NOT NULL
    AND orgp.party_id = pv.partner_party_id
    AND pv.partner_id = p_partner_id ;
  indx NUMBER := 1;
BEGIN
  x_assigned_count := JTF_VARCHAR2_TABLE_4000();
  FOR lc_cursor IN lc_count LOOP
    x_assigned_count.EXTEND;
    x_assigned_count(indx) := lc_cursor.annual_revenue;
    indx := indx + 1;
  END LOOP;
End;
```

Example: Populating a Derived Attribute with a SQL Statement

The application provides a the following sample SQL statement that can be modified to create a custom SQL statement for a list of values:

```
select pac.attr_code code,
pac.description meaning,
pac.description description from
  pv_attribute_codes_v1 pac where
  pac.attribute_id = ? and
  pac.enabled_flag = 'Y'
```

In the SQL statement, attribute_id can refer to a table column or an actual attribute id.

For a derived attribute with a List Of Values value type, a list of values is provided through a user-defined SQL statement. The following example provides a SQL statement for a derived list of values attribute where:

- The attribute id = xxxx
- The list of values is derived from an external lookup FND_EXAMPLE_LOOKUP

```
select lkp.lookup_code code,  
       lkp.meaning meaning,  
       lkp.description description  
from fnd_lookups lkp  
where lkp.lookup_type = 'FND_EXAMPLE_LOOKUP'.  
and xxxx= ?
```

Setting Up the Partner Dashboard

This chapter covers the following topics:

- Overview
- Setting Up the Partner Dashboard
- Creating the Partner Dashboard Web Pages
- Creating the Partner Dashboard Site
- Creating Partners and Partner Users
- Creating Partner Program Enrollment Pages
- Giving Partners Access to the Library
- Profile Options

Overview

The partner dashboard provides partner users with a single point of entry for working with the vendor. From the dashboard, partners can:

- Register as a partner, and then enroll in programs for which they are eligible.
- Manage their memberships including upgrades and renewals.
- Manage transactions such as viewing the catalog, placing orders, managing sales opportunities, and accepting opportunities.
- Submit referrals, register deals, request marketing funds, request special pricing, and create quotes.
- Maintain the partner contact and company profile.
- View notifications.
- Access content published by the vendor.

The Partner Dashboard is the mechanism by which partner organizations are entered into Oracle Partner Management and partner users are added to the system. Thus, partner organizations and users are not set up directly by a vendor user, but instead are created automatically as a result of self-registration. This chapter describes how partner users are set up and the roles and permissions that they are assigned.

The Partner Dashboard is configured and managed through the Oracle iStore application. This chapter provides basic information to help you get started setting up a

Partner Dashboard. For more thorough information, refer to the *iStore Implementation Guide*.

Setting Up the Partner Dashboard

Oracle Partner Management integrates with Oracle iStore to provide the Partner Dashboard. The Partner Dashboard is an iStore web site, and is set up through the iStore application.

A site is any site that the site administrator (manager) creates using the Oracle iStore Site Administration user interface. From this interface, the site administrator creates the Partner Dashboard site by selecting a template to use to format the site, selecting appropriate text, images, and hyperlinks to populate the site, and setting up the Dashboard as a live, specialty site that is linked to a partner responsibility.

Multiple specialty sites can exist within one site, as each site-responsibility combination is considered a specialty site. Speciality sites can be assigned to groups. The Partner group is shipped out of the box to facilitate customers to group partner sites into a single group.

The iStore user interface allows a vendor organization to implement the Partner Dashboard so the it meets the organization's business needs. To help you get started, Oracle Partner Management provides some seeded bins that can be used in the dashboard. In addition, iStore profiles the Configurable Layout Template, which provides a simple yet highly usable page format.

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

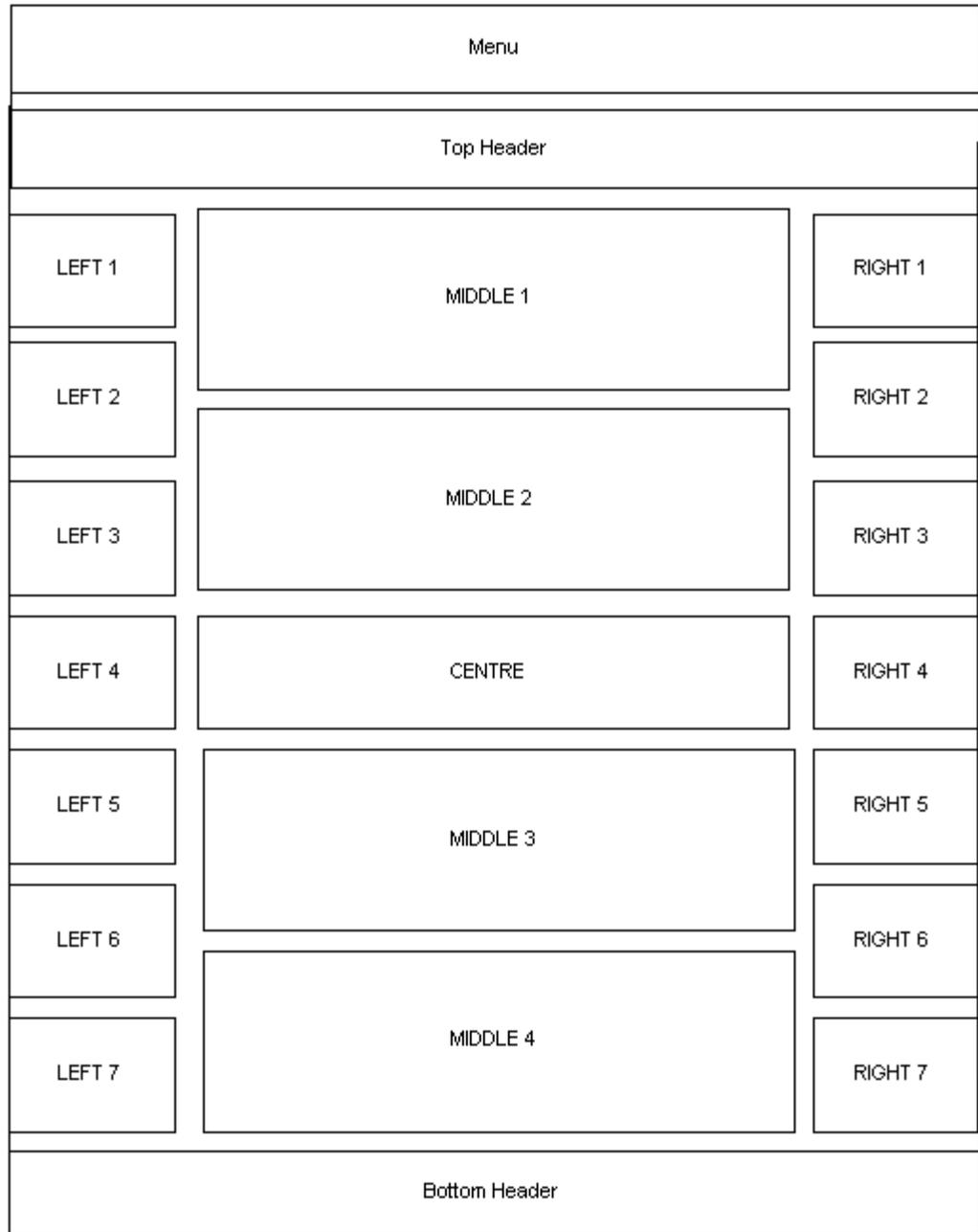
For example,

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

Using the Partner Dashboard Template Layout

The following figure displays the seeded partner dashboard template layout with top header, menu and bottom header locations.

Partner Dashboard Template Layout



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

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

Setting Up Partner Dashboard Bins

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

The following bin templates are shipped out of the box. The vendor organization needs to map these bin templates to appropriate locations for the Configurable Layout:

- Quick Links bin
- Renew Programs bin
- Upgrade Programs bin
- Available Programs bin
- My Opportunities bin
- Manage My Partners bin
- Welcome bin
- Marketing Posting bin
- Partner Group bin
- Store Group bin

Quick Links Bin

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

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

- **Partner benefits.** Partners have to be entitled to use each type of benefit. The benefits displayed to the partner users in the Quick Links bin are controlled using responsibilities. The list of links available in the bin depends on the current responsibility assigned to the user and the functions and menus attached to that responsibility. For the links to appear in the Quick Links bin the following setup needs to be done:
 1. Define a menu that contains all functions, exposed to the partner user.
 2. Specify this menu name as the value for the responsibility level profile option 'IBE: Quick Links Menu' that is assigned to the user. This menu specified in the profile should be one of the sub menus under the root menu.
- **User role within the partner organization.** Partners can access transactions that they created or are assigned to them. For example, if an opportunity is assigned to a partner, the partner can see that opportunity. If a partner created a referral, he/she

can view the referral. Partner administrators can access all transactions created by any user or, transactions assigned to any user, within their organization.

Renew Programs Bin

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

Upgrade Programs Bin

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

Available Programs Bin

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

My Opportunities Bin

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

Manage My Partners Bin

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

Welcome Bin

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

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

Marketing Posting Bin

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

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

Partner Group Bin

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

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

Store Group Bin

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

Bin JSPs -Template Mapping

The following table lists the templates and corresponding bin JSPs that can be customized as per guidelines in the Oracle iStore Implementation Guide.

Bin JSPs

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

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

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

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

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

Understanding iStore Partner Templates

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

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

Creating the Partner Dashboard Web Pages

After you had determined that the Partner Dashboard pages are complete, complete this procedure to set up the pages as an actual web site accessible by partner users. Partner Dashboard sites are created in iStore by a user with the iStore Administrator responsibility.

Navigation

Log on with the iStore Administrator responsibility, and navigate to the Catalog tab > Catalog Hierarchy page.

Prerequisites

None.

Steps:

1. Select the Root section for Oracle Partner Management and click the Create Section icon in the sections column.
The Root section is seeded. The Create Section page appears.
2. Enter the necessary details and click **Apply**.
Make sure that the status is Published and the dates are active. The Update Section Details page appears.
3. To associate a template with the section, select the Templates side navigation link.

The Update Section: Layout page appears.

4. In the Layout region, from the Select Layout LOV, select a layout that you want to apply to the above create section and click Go. The layout determines the bins that are to be displayed on the left and right sides of the dashboard. The values are: Configurable and Fixed Layout.
5. If you select the Configurable layout, perform the following steps to map the bins to templates. The templates are seeded in Oracle iStore.
 1. In the Mapping region, select a template from the Layout Component Templates LOV and map it to a layout component.
 2. Click **Apply**.
6. If you selected the Fixed Layout, you must map the bin JSPs to templates. You cannot see the Mapping region because the templates are already positioned and the layout cannot be configured.
 1. Navigate to Advanced tab > Template Manager > Templates page.
 2. Select Programmatic Access Name from the Search field and enter STORE_CTLG% and click **Go**. All seeded locations are displayed.
 3. Click **Update** for the Bin Left 1 record.
 4. In the Update Template page, click **Add Source File**.
 5. In the Add Source File page, in the Source File Name field, enter the JSP for Quick Links. For example, vin-ibeCAcdQuickLinkBin.jsp.
 6. Select the above created site from the Site drop-down list and click **Apply**. The Update Template page appears with the JSP mapped to the bin.
7. Select the Display Layout side navigation link.

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

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

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

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

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

The Display Template for the section is selected.

For information on the center template, refer to the *Oracle iStore Implementation Guide*.

Creating the Partner Dashboard Site

After you had determined that the Partner Dashboard pages are complete, complete this procedure to set up the pages as an actual web site accessible by partner users. Partner Dashboard sites are created in iStore by a user with the iStore Administrator responsibility.

Navigation

Navigate to the Catalog tab > Catalog Hierarchy page.

Prerequisites

The Partner Dashboard web site pages have been created.

Steps:

1. Navigate to the Sites tab and click **Create a Site** and enter necessary details.
2. In the Catalog Root Section field, select the section created above.
Select the Restrict customer access by responsibility check box.
Do not select the Allow un-registered users to browse the site check box.
3. Click **Apply**.
A site is created and the Update Site: Details page appears.
4. Click the Responsibility side navigation link.
The Site ABC: Supported Responsibilities page appears. Customers can access the site through these responsibilities.
5. Click **Add Responsibility**.
6. In the Search and Select Responsibility page, select any responsibility and click **Select**.
The responsibility is added to the site and only users with this responsibility can access the site.
7. In the Site Display Name field, enter a unique name.
The name should help to identify the site as a partner site.
8. In the Site ABC: Supported Responsibilities page, click the **Assign Groups** icon.
9. In the Update Site: Assign Groups page, select a group from the Unassigned Groups section and click Move to move it to the Assigned Groups section.
10. Click **Apply**.
The Responsibility and site are assigned to the selected groups and partners can view sites that they have access to, through the responsibilities that they have received by enrolling into programs.

Creating Partners and Partner Users

Partners and partner users are created in Oracle Partner Management through the self-registration process. A partner employee can register his organization as a partner and register himself as a partner user. Subsequently, additional employees in the partner

organization can register as partner users, or the organization's partner administrator can sign up other employees as partner users. An organization and its employees register using a link provided during implementation.

Once a partner employee starts the registration process, he is guided through a series of steps to submit company and user information. Once this information is submitted, Oracle Partner Management generates a company and user account for the organization. The partner user is given a user name and password, which, he selects during registration and then receives a notification about. The partner employee registered during the partner organization registration process is always registered as a primary user. Default roles and responsibilities are granted to a partner user upon the completion of the registration flow.

When a partner registers:

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

Each partner organization and partner user that registers is subject to the enrollment approvals process. For additional information about approvals and enrollment, refer to *Setting up Partner Program Enrollments*, page 9-1.

Enabling User Types

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

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

Use this procedure to enable the user types.

Prerequisites

None.

Steps:

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

- IBE_PARTNER_BUSINESS
- IBE_PARTNER_PRIMARY

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

Partner User Responsibilities, Roles, and Permissions

Like employees of the vendor organization, partner employees are assigned responsibilities, resource roles, and permissions-based roles.

Responsibilities

There are two partner user responsibilities:

- **Default Partner User:** This responsibility is used to display the Partner Dashboard to the partner user after the partner organization has registered but before the partner has enrolled in a program. Partners users with the Default Partner User responsibility have a limited view of information on the Partner Dashboard. They can see the Available Programs bin, but cannot see the Quick Links bin because no menu is attached to the Default responsibility. The users cannot see the Upgrade and Renewal bins, since the partner is not yet registered in a partner program. Finally, since the partner does not yet have offered opportunities, the users do not see the Offered Opportunities bin.

After a partner enrolls in a program, Oracle Partner Management removes the Default Partner User responsibility and assigns partner users the responsibilities that are associated with the partner program. Depending on the program and the associated responsibilities, the partner's users will be able to see additional information on the Partner Dashboard. For more information on partner programs and responsibilities, refer to Mapping Partner Responsibilities to Programs, page 8-9.

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

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

Resource Roles

Oracle Partner Management provides two resource roles for partner users. A role is assigned to a user during the self registration process or when the partner administrator sets up a partner employee as a user:

- **Primary Business User:** By default, this resource role is assigned to the partner employee who first registers his organization. A user with this role has administrative capabilities.
- **Default Business User:** This role is assigned to partner users who are created through self-registration or by a user with the Primary Business role. This role should be assigned to all partner users who will do not need administrative functionality, including users in distributor organizations who will be responsible for managing their organizations' partners.

Permissions-Based Roles

Oracle Partner Management provides two permissions-based roles that are used for partner users and are assigned to a user during the self registration process or when the partner administrator sets up a partner employee as a user:

- **PV_PARTNER_PRIMARY_USER:** By default, this role is assigned to the partner employee who first registers his organization as a partner. A user with this role is referred to as the Primary User. The Primary User has administrative capabilities, such as the ability to set up other employees as users and the ability accept compensation for deal referrals.
- **PV_PARTNER_BUSINESS_USER:** This role is assigned to all users that are created through self-service registration. A user with this role is referred to as a Business User. A Primary User can give Business Users the Primary User role from the Profile > Administration > Contact Management > Roles UI page.

The following table lists permissions that are seeded with the Primary User (PV_PARTNER_PRIMARY_USER) role:

Permissions of the PV_PARTNER_PRIMARY_USER Role

Permission Name	Description
PV_PARTNER_USER	Indicates that the user is a partner user.
PV_MY_CONTACT_PROFILE	Provides access to the partner's profile. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
PV_SALES	Provides access to view sales preferences. Navigate via the Profile icon > My Profile > Preferences.
PV_PARTNER_UPDATE_PROFILE	Provides access to update a partner's organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_PARTNER_VIEW_PROFILE	Provides access to view a partner's organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_VIEW_MEMBERSHIPS	Provides access to view partner memberships. Navigate via the Profile icon > Company Profile > Memberships.
PV_CHANNEL_TEAM	Provides access to view a partner's channel team. Navigate via the Profile icon > Company Profile > Channel Team.
PV_CONTACT_PROFILE	Provides access to view a contact's profile information. Navigate via Profile icon > Administration > Contact Management > Detail > View More Details button.
PV_OPPTY_CONTACT	This is used to identify the partner contacts during opportunity routing.

Permission Name	Description
PV_REF_COMP_APPROVER	This is defined for partners who can accept compensation. This permission enables partners to view and accept compensation for referrals.
PV_REFERRAL_SUPERUSER	This a Super User permission defined for referral management. It can be assigned to vendors and partners. Vendors with this permission can view and update all referrals. Partners with this permission can view, update, and accept compensation for referrals for their organization.
PV_DEAL_SUPERUSER	This is a Super User permission defined for deal registration. It can be assigned to vendors and partners. Vendors with this permission can view and update all deals. Partners with this permission can view and update all deals for their organization.

The following table lists permissions that are seeded with the Business User (PV_PARTNERBUSINESS_USER) role:

Permissions of the PV_PARTNER_BUSINESS_USER Role

Permission	Description
PV_PARTNER_USER	Indicates that the user is a partner user.
PV_MY_CONTACT_PROFILE	Provides access to the partner's profile. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
PV_VIEW_MEMEBERSHIPS	Provides access to view partner memberships. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_SALES	Provides access to view sales preferences. Navigate via the Profile icon > My Profile > Preferences.
PV_PARTNER_VIEW_PROFILE	Provides access to view a partner's organization information. Navigate via the Profile icon > Company Profile > Company Information > Profile tab.
PV_CHANNEL_TEAM	Provides access to view a partner's channel team. Navigate via the Profile icon > Company Profile > Channel Team.

Oracle iStore Permissions

In addition to Oracle Partner Management permissions, numerous iStore permissions are included with partner user roles. The following table lists the Oracle iStore permissions

for the for the PV_PARTNER_PRIMARY_USER and PV_PARTNER_BUSINESS_USER roles.

Oracle iStore Permissions

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

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

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

VAD Users

Value-added distributors might work with their own partner organizations. Partner users that are members of a VAD have additional abilities. VAD users who manage their organization's partners can be assigned the Channel Manager role, which provides them with visibility into partner information. In addition, the following permissions can be assigned to VAD users to give them additional partner management capabilities:

- **PV: View All Partners permission:** Allows a user to view information about all partners in his organization.
- **PV: Update All Partners permission:** Allows a user to view and update information about all partners in his organization.
- **PV: Invite New Partners permission:** A user with this permission can invite an organization to become a partner. The user sees the Invite New Partner button on his Partners page.

Creating Partner Program Enrollment Pages

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

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

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

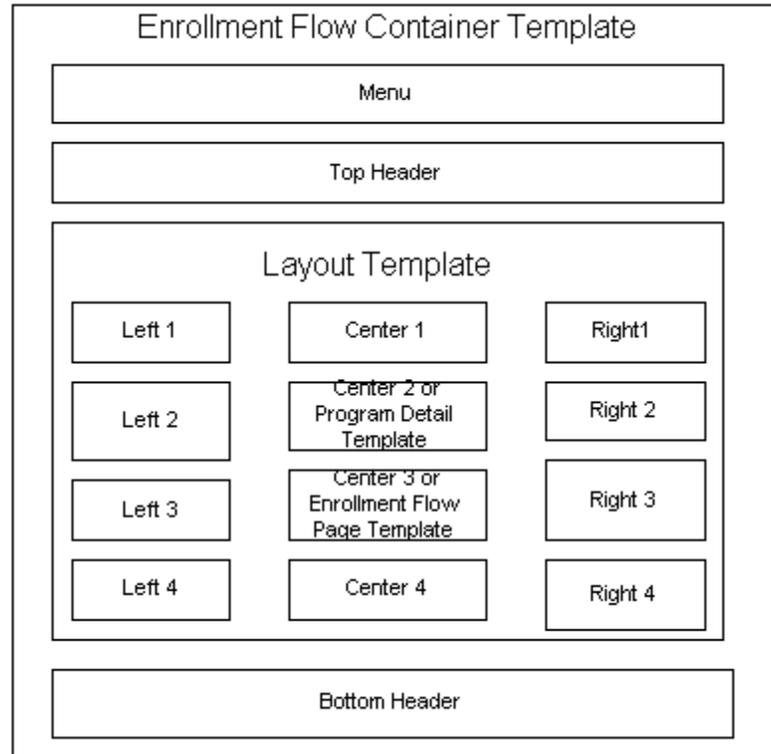
- The top header renders <html>, <head> tags. Customers can add any thing that they would like to see prior to menu rendering in this page.
- The Left 1, Left 2, Left 3, Left 4, Right 1, Right 2, Right 3, Right 4, Center 1, Center 2, Center 3 and Center 4 templates are part of the Layout template.

- The layout template includes the content rendering part of the enrollment flow.
- The bottom header renders </html> tags.

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

The following figure displays the enrollment flow template with top header, menu, and bottom header locations.

Enrollment Flow Template

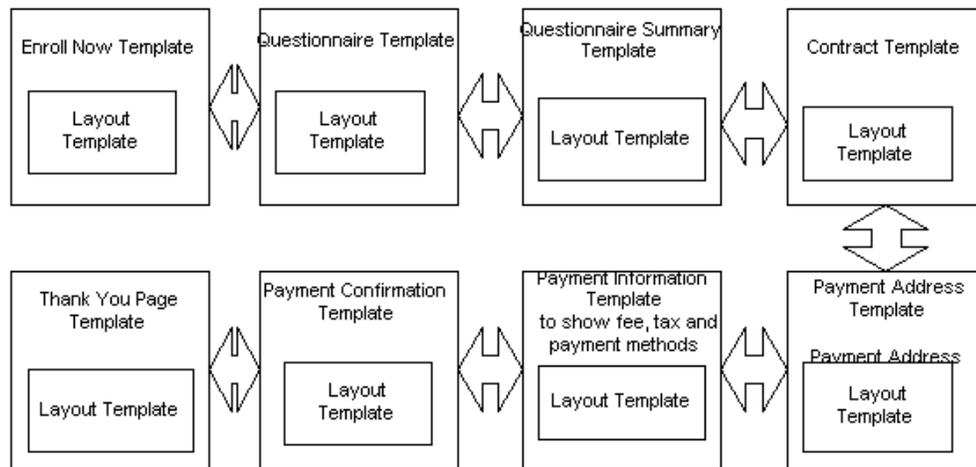


Each page in the enrollment flow has different data that needs to be processed when user clicks the Next button. Hence, each page in the enrollment flow has separate container pages. To minimize the amount of work when a customer wants to customize the layout, the same layout template is present across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

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

The following figure illustrates the container templates mentioned above.

Container Templates



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

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

Giving Partners Access to the Library

A vendor organization can give partner users access to the organization's library from the Partner Dashboard. To provide partners with access to the vendor organization's Library, a Library link must be added to the Quick Links bin on the Partner Dashboard. Through personalization, a vendor can hide some of the sections of the library that are inappropriate for vendors.

After you have added the Library link to the Partner Dashboard, log in as a partner user and look at all the sections in the content details page. Depending on your organization's business requirements, you might determine that some sections should not be available for partners.

These sections provide high-level information on using personalization. For additional information, refer to the *Oracle Application Personalization Framework* guide.

Adding a Library Link to the Partner Dashboard Quick Links Bin

All menus that are available for partner users must be modified to enable Library access. You must identify all the partner responsibilities for which you want to provide a Library link, and then identify the Quick Links menu used by each responsibility. The Quick Links menu should be the menu identified by the IBE: Quick Links Menu profile option. For example, for the Partner Super User responsibility, this menu is PV_PARTNER_SUPER_USR_MAIN_MENU.

Prerequisites

The vendor organization must have set up sites for all partner responsibilities that need access to the Library link.

Navigation

Log in to Oracle with the System Administrator responsibility.

Steps:

1. Navigate to Application > Function and create a new function called PV_LAUNCH_LIBRARY.
2. Provide the following values for the new function.
 - **Type:** JSP Interop
 - **HTML Call:** pvxLaunch.jsp?OAFunc=IBC_LIBRARY_PG&OAHP=PV_PARTNER_USR_HOME&OAPB=PV_PARTNER_USER_BRANDING
3. Navigate to Application > Menu.
4. Add the PV_LAUNCH_LIBRARY function to PV_PARTNER_SUPER_USR_MAIN_MENU.

Make sure that you select the PV_PARTNER_SUPER_USR_MAIN_MENU. A menu titled PV_PARTNER_SUPER_USER_MAIN_MENU might be available; this is a different menu.

5. Add IBC_LIBRARYTAB_MENU submenu under PV_PARTNER_SUPER_USR_ROOT_MENU.
6. Add the IBC_PRVEVIEW_PG function to PV_PARTNER_SUPER_USR_ROOT_MENU.

Enabling Personalization for Partner Responsibilities

Use this procedure to enable personalization for partner responsibilities.

Prerequisites

None

Navigation

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

Notes:

- Set the following profile options to Yes at the user level for each partner user that has access to each of these partner sites that are associated with partner responsibilities, which need to provide access to the library link:
 - Personalize Self-Service Defn
 - FND: Personalization Region Link Enabled

Personalizing Library Information for Partner Responsibilities

Personalization is used to hide some of the information that appears in the Library. This procedure provides instructions for hiding categories from partner users. Depending on

business requirements, a vendor organization might have numerous Library categories to hide or only a few.

The personalizations documented in this procedure must be performed for each partner responsibility that is used in your implementation.

Prerequisites

None

Navigation

Log in to the Oracle HTML application as a partner user, and navigate to the user's Partner Dashboard. Then, navigate to Library > Content Library > Browse categories, and select the any category that has some content items defined. Drill down in any content name to look at content item details.

Steps:

1. Click the global Personalization link or icon that appears at the top of the page.
The Choose Personalization Context page appears.
2. Uncheck the Site Included check box.
3. Remove the organization name.
4. Make sure that the appropriate partner responsibility is selected in the responsibility field.
5. Click Apply.
6. Locate the Header: <name of category> line, click the Update icon, and change the Rendered value to False. Then click Apply to apply the changes.

Repeat this procedure to hide all the categories that should be unavailable to partner users.

Disabling the Personalization Global Icon

It is not recommended that partner users have access to Personalization. In Enabling Personalization for Partner Responsibilities you turned on personalization for each partner responsibility so that selected categories could be disabled in the partner's version of the library. In this procedure, you turn off personalization for the same user.

Prerequisites

None

Navigation

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

Notes

- Set the following profile options to No or Null at the user level for each partner responsibility:
- Personalize Self-Service Defn
- FND: Personalization Region Link Enabled

Profile Options

There are certain system profile options that must be set for the Partner Dashboard to function properly. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for the Partner Dashboard.

Setting Up the Channel Manager Dashboard

This chapter covers the following topics:

- Overview
- Vendor User Data Visibility
- Setting Up Graphs in the Channel Manager Dashboard
- Workflow Business Events
- Profile Options
- Concurrent Programs

Overview

The Channel Manager Dashboard provides vendor users with an easy to use, configurable user interface to help them with day to day responsibilities. It provides them with a 360 degree view of their partners and activities, thereby enabling them to make informed decisions.

The Channel Manager Dashboard provides vendor employees with a Key Metrics bin, charts and graphs that display the sales performance of partners, a Quick Links bin, and a partner search. Vendor employees can perform advanced partner searches for partners based on profile attributes.

A vendor employee can access the dashboard if he has been assigned the Channel Manager responsibility. The information available on a user's dashboard is further determined by channel team membership, resource role, and permissions. In this chapter, we describe how a user's roles and permissions affect what he sees on a dashboard, and how the Sales Performance Graph is set up and populated. For information on creating vendor users and assigning roles and permissions to them, refer to Setting up Vendor Users, page 4-1.

Vendor User Data Visibility

A vendor user's resource role and permissions determine the partner data he sees in three areas on the Channel Manager Dashboard: the Key Metrics bin, the Sales Performance graphs, and the My Partners list.

Key Metrics Bin and Sales Performance Graphs

The Key Metrics bin and the Sales Performance graphs provide statistical information about the performance of partners whose data the user can view and update. A vendor user gains access to partner data in two ways:

- **Channel team membership:** A vendor user who is a member of a partner's channel team can access information about a partner, and is said to "manage" the partner. The Key Metrics bin and the Sales Performance graphs display statistics for all the partners for which the user is a channel team member.

A vendor user is assigned to a channel team automatically according to the organization's Partner Management territory hierarchy. Refer to *Setting up Territories in Oracle Territory Manager*, page 3-6 for information on setting up the Partner Management territory and using it to create channel teams. In addition, a user can be added to a partner's channel team manually by a user with the appropriate permission. When a user is added to a partner team manually, an option can be set that insures that the user will remain on the channel team even if there is a territory reorganization.

- **Resource group role:** The role assigned to a user within a resource group can also affect the information that appears in his Key Metrics bin and Sales Performance graph:
 - A user with the channel representative role sees information about partners for which he is a member of the sales team.
 - A user with the channel manager role sees information about a partner if he is a member of the partner's sales team. In addition, the channel manager also sees information about all partners that the group's channel representatives manage.
 - If a group is a parent group, the channel manager can also see information about partners managed by channel managers and channel representatives in all the child groups as well.

Partner Search Results

The My Partners area of the Channel Manager Dashboard lists the results of a partner search. A user's resource role and permissions determine the partners that are returned by a search and what actions a user can take upon those partners (for example, view, update, invite).

- **Channel Representative Role:** A user with the Channel Representative role's partner search will return partners that he manages. The channel representative can view and update information about these partners.
- **Channel Manager Role:** A user with the Channel Manager role's search will return both partners that he manages and partners that are managed by channel representatives in his group. In addition, if the channel manager's group is a parent group, his search results will include partners managed by channel managers and channel representatives in child groups. The channel manager can view and update information about these partners.
- **PV: View All Partners permission:** If a user has this permission, his search results can contain partners owned by any other channel manager or channel representative in the organization, as well as his own partners. A user with this permission can view and update information about partners that he manages directly; he can

only view information about partners managed by other users. This permission can be assigned to users with any role.

- **PV: Update All Partners permission:** If a user has this permission, his search results can contain partners owned by any other channel manager or channel representative in the organization, as well as his own partners. A user with this permission can view and update information about all partners in the system. The user also sees the Create as List button on his Partners page, which allows him to create a partner list. This permission can be assigned to users with any role.
- **PV: Invite New Partners permission:** If a user has this permission, he is able to invite an organization to become a partner. The user sees the Invite New Partner button on his Partners page. This permission can be assigned to users with any role.

Statistical information about the partners that a user manages, either directly as a channel team member or indirectly as a channel manager, appears in the user’s Key Metrics bin and Sales Performance graph. Information about partners that the user does not manage, but can access because of the PV: View All Partners or PV: Update All Partners permissions, is not included in his statistical overview information.

The following table provides details about what information users with specific role and permission assignments can see. Note that the table also provides information about what Distributors can see. A Distributor is a partner user who also has functionality similar to that of vendor users.

Roles and Permissions

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

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

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

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

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

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

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

Setting Up Graphs in the Channel Manager Dashboard

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

Setting up the Accounting Calendar

The Accounting Calendar is set up from the Oracle General Ledger application. Unless you are implementing Oracle Partner Management as a stand-alone application, the Accounting Calendar has most likely been set up already.

The Accounting Calendar is set up in Oracle Forms by a user with the General Ledger Super User responsibility.

Populating the Graph

The x-axis of the Sales Information graph is populated with data stored in the as_period_days table. Running the Refresh AS period days concurrent program populates this table with data from the General Ledger Accounting Calendar.

The graph's y-axis is populated with Sales data.

Workflow Business Events

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

Workflow Event Subscriptions

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

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

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

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

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

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

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

Event Organization Update

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

The following table lists the subscription setup details for an organization.

Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.Organization.update
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.organization_update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an updation in organization related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Partysite Update

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

The following table lists the subscription setup details for a party site.

Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.PartySite.update
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.partyupdate_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in the PV_TAP_BATCH_CHG_PARTNERS table, whenever there is a change in the organization party site related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Location Update

Each time a location-related partner qualifier (e.g. City, County, Country, Postal code, Province, State etc.) value changed, a workflow business event oracle.apps.ar.hz.Location.update is raised to indicate that location information got updated. A code attached to the Rule function of the subscription executes.

The following table lists the subscription setup details for a location.

Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.Location.update
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg.location_update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager
Owner Tag	PV
Description	Create a changed partner record in PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an updation in organization location related partner qualifiers, resulting in re-definition of Channel team for that Partner Organization.

Event Contact Point Update

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

The following table lists the subscription setup details for a contact point.

Subscription Setup Details

Column Name	Value
System	SEED11.WORLD
Source Type	Local
Event Filter	oracle.apps.ar.hz.ContactPoint.update
Source Agent	-
Phase	50
Status	Enabled
Rule Data	Key
Customization Level	Limit
Rule Function	pv_tap_bes_pkg. contactpoint update_post
Workflow Type	-
Workflow Process	-
Out Agent	-
To Agent	-
Priority	Normal
Parameters	-
Owner Name	Partner Relationship Manager

Profile Options

There are certain system profile options that must be set for the Channel Manager Dashboard to function properly. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for the Channel Manager Dashboard.

Concurrent Programs

There are several concurrent programs that need to be run periodically for the Channel Manager Dashboard. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting Up Partner Programs

This chapter covers the following topics:

- Overview
- Setting Up Program Types
- Setting Up Programs in Oracle Inventory
- Specifying the Location of Price Lists
- Setting Up Payment Options
- Setting up Program Benefits
- Setting Up Locking Rules
- Setting Up Mandatory Rules
- Setting up Program Contracts
- Setting Up Partner Program Overviews
- Mapping Partner Responsibilities to Programs
- TCA Events and Subscriptions
- Profile Options
- Lookups
- Concurrent Programs

Overview

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

Vendors can also customize programs to recruit new partners and motivate existing partners. Programs can be created for groups of partner types, for example, Value Added Resellers (VARs), Original Equipment Manufacturers, and Prospects.

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

Examples of benefits that can be associated with a partner program include the following:

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

Partner programs consist of numerous features, many of which are available through integrations with other Oracle applications. During implementation, and as part of on-going administration, a channel administrator is responsible for the following tasks:

- Setting up program types and specifying program approvers
- Adding programs to Oracle Inventory
- Specifying price lists to be used for programs
- Setting up payment methods
- Setting up program benefits, such as opportunity management, special pricing, or deal referral and registration
- Making sure that program contracts have been set up in Oracle Contract Management
- Setting up mandatory and locking rules
- Adjusting channel managers' permissions in Oracle Content Management, which is used to store partner program overview information
- Specifying the type of text editor to be used to create partner program overviews
- Mapping partner responsibilities to programs

Once the channel administrator's partner program set up tasks are completed, channel managers have all the tools they need to create and manage actual partner programs. For information on creating and managing partner programs, refer to the *Oracle Partner Management Vendor Users Guide*.

Setting Up Program Types

The channel administrator is responsible for specifying the program types that will be available for program creation. A program type defines the type of partners that can enroll in the program (for example, distributors, VADs, or resellers) and identifies certain users as program approvers. The approvers will be responsible for approving new programs created by channel managers. A program must be approved before partners can enroll in it.

The Oracle Marketing Framework (AMS: Generic Approval Framework) is used to route approval requests and notifications, and get approvals. For a user to be available as a partner program approver, he must be set up as an approver in the Oracle Marketing

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

Use this procedure to set up a program type.

Navigation

Log on with the channel administrator responsibility and navigate to Programs > Program Type, then click Create Type to access the Create Partner Program Type page.

Prerequisites

None.

Notes

- **Partner Types:** The partners available in this list are determined by the types of partners specified in the Partner Type partner profile attribute. You can select multiple partner types.
- **Approvers:** Specify one or more users who will be responsible for approving programs. Note that the approvers specified here are responsible for approving programs set up by channel managers. A different approval system is used to approve partner program enrollment requests.
 - **Order:** If multiple approvers are required, set up an approval order.
 - **Type:** Select User from the list, and then search for the user in the User Role field.
If the program creator and the approver are the same person, the program is approved automatically.

Setting Up Programs in Oracle Inventory

Frequently, partners must pay a fee before they can join a partner program. If a fee is associated with program enrollment, an order must be created for the program in Oracle Marketing; for an order to be created, the partner program must be set up as an inventory item in Oracle Inventory.

To set up partner programs in Oracle Inventory, the channel administrator must complete the following:

- Specify the inventory organization in which programs will be stored.
- Set the PV: Concatenated Inventory Flex Segments for Program profile option to add partner programs to Oracle Inventory.
- If the vendor organization is implementing Oracle Partner Management as a standalone application, inventory categories and items might need to be set up as well. Refer to the *Oracle Inventory Users Guide* for more information.

Setting the AMS Item Validation Master Organization Profile Option

The AMS Item Validation Master Organization profile option is used to determine the inventory organization in which partner programs will be stored as items. The profile setting should be the name of the organization.

Setting the PV: Concatenated Inventory Flex Segment for Program Profile Option

Inventory items are added using a key flex field. Partner Management uses the PV: Concatenated Inventory Flex Segments for Program profile option to populate

the flexfield with information that creates a partner program inventory item. Oracle Inventory uses one of the segments in the flexfield to uniquely identify each inventory item; each Oracle application that sets up inventory items must populate this segment with information that uniquely identifies its items. Other segments in the flexfield are used to provide additional information about the item (such as company name or business unit).

To set this profile option properly, you need to determine the following:

- What values must be specified in the segments that precede the segment that uniquely identifies the inventory item.
- The style of segment delimiter.

When you set the profile option, you specify appropriate values for the preceding segments and enter the code for the program. Then, you enter the value `PV_PRGRM_FLEX_CODE` for the segment that will provide the information required to set up the partner program as an Inventory item.

For example, suppose that the vendor organization's Inventory key flexfield uses four segments to specify an inventory item, and uses "." as the delimiter:

- Segment 1: Company name = VENDOR
- Segment 2: Business unit = SOFTWARE
- Segment 3: Business subunit = EBUS
- Segment 4: Inventory item identifier

For this organization, the PV: Concatenated Inventory Flex Segment for Program profile option would be populated as follows `VENDOR.SOFTWARE.EBUS.PV_PRGRM_FLEX_CODE`, where the `PR_PRGRM_FLEX_CODE` concatenates the first five letters of the partner program's name with the `program_id` value, which is populated by the database when the partner program is created.

For a program called Distributors Gold Program, the inventory flexfield would be populated as follows:

`VENDOR.SOFTWARE.EBUS.DISTRPV123`, where "PV123" is the `program_id` assigned by the database.

Specifying the Location of Price Lists

Partners might be charged to enroll into a partner program. Thus, partner programs must be associated with price lists, which can be used to determine the appropriate program price for each partner. When the channel manager creates a partner program, he selected which price list or price lists will be used for the program. If multiple price lists are used, the channel manager must define precedence so that the appropriate price is selected.

Partner Programs can be priced using either the Oracle Advanced Pricing or the Oracle Order Management application. The channel administrator specifies which application is used by setting the profile option QP: Source System Code. This profile is set at the Application level; when the profile is set, the value provided is the name of the pricing application to be used.

For more information on setting up pricing, refer to *Oracle Advanced Pricing User's Guide* or the *Oracle Marketing Implementation Guide*.

Setting Up Payment Options

A variety of payment methods can be set up to help partners pay program enrollment fees conveniently. Payment methods can include cash, credit, check, or purchase order.

Payment methods are set up based on geographical regions, which allows the vendor to set up different payment options for partners located in different countries or regions, if necessary. The geographic regions used to specify payment options are set up in Oracle Marketing. Geographic information may already be set up for your implementation. However, if it is not, it can be set up by a user with Oracle Marketing administration access. Refer to the *Oracle Marketing Implementation and Administration Guide* for additional information.

Use this procedure to add a payment rule to specify available payment methods by geographic regions from the Payment Option Details page.

Navigation

Log on as the channel administrator and navigate to Programs > Payment Methods, and then click Add Payment Rule to access the Payment Option Details page

Prerequisites

None.

Notes

- **Geography Level:** Indicates the level at which the payment option applies, for example, country or state.
- **Geographic Region:** Further defines the geographic information. The regions options are determined by the Geography Level selected previously. For example, if you select Country as the Geography Level, the Lookup for Geographic Region lists all countries stored in the Oracle Marketing application.
- **Select Payment Method:** Payment method choices available are determined by the union of two Lookups:
 - **PAYMENT TYPE:** This is an Oracle Order Management Lookup, and provides the methods Cash, Check, and Credit Card.
 - **PV_PAYMENT_TYPE:** This is an Oracle Partner Management Lookup, and provides the method Purchase Order.

Setting up Program Benefits

A benefit is a feature of a program that provides value to a partner, for example:

- Access to funds for marketing or other promotional activities
- Ability to request special pricing
- Incentives for referring business to the vendor
- Access to mailing lists or iStore

A benefit can be associated with one or more partner programs. Benefits are associated with partner programs, and are granted to a partner organization through partner program enrollment.

The channel administrator sets up benefits from the Benefit Administration page. When setting up a benefit, the administrator selects the type of benefit to be created from

the list of available benefits, which include deal registration, soft fund, referral, and other. Numerous benefits of the same type can be set up; for example, the vendor might want to offer different soft fund benefits to different types of partners.

Setting up a soft fund (also referred to as a partner fund), deal registration, or referral benefit involves specifying additional steps, such as assigning a budget to the benefit or associating products with it. Additional information about creating a deal registration benefit, partner fund benefit, and referral benefit is presented in each benefit's specific chapter.

Opportunity management and special pricing functionality are also made available to partners through benefit creation. To set up these types of benefits (as well as benefits such as access to mailing lists or iStores), the channel manager creates a benefit of type Other. Refer to the chapters on Special Pricing and Opportunity Management for more information.

A benefit's status must be Active before it can be available for use in a partner program.

Setting Up Locking Rules

A locking rule locks a partner program field to further editing. More specifically a locking rule specifies that a field can not be edited when the partner program is in a certain status. For example, you might want to lock some fields once a program becomes Active.

Navigation

Log in as the channel administrator and navigate to Programs > Locking Rules.

Prerequisites

None.

Notes

- **Object Attribute:** Select the flow for which you are creating the locking rule. The list of available fields is updated to reflect the fields contained in the flow selected.
- **System Status:** Select the program status that will cause selected fields to become locked.

Setting Up Mandatory Rules

Mandatory rules allow you to specify fields that are required for program creation. You can create mandatory rules for each feature or flow that you set up for a partner program.

Navigation

Log in as the channel administrator and navigate to Programs > Locking Rules.

Prerequisites

None.

Notes

- **Object Attribute:** Select the feature or flow for which you are creating the mandatory rule. The list of available fields is updated to reflect the fields contained in the object attribute selected.

Setting up Program Contracts

A vendor can associate legal terms and conditions with membership in a partner program. Terms and conditions are listed in a contract, which is presented to a partner user who the program enrollment process. If the partner agrees to the terms, the partner user then submits the signed contract to the vendor via fax or regular mail.

Oracle Partner Management integrates with the Oracle Contract Management, which allows the vendor to create and manage contracts. A contract template can be attached to a program based on geography, program type, and member type. Member type can be used to present global partners with contracts that differ from contracts presented to standard or subsidiary partners.

In Oracle Partner Management, the contract template is displayed and not the actual contract. The channel manager selects the type of contract or contracts that he wants to associate with a program and attaches it to a partner program. Once the partner clicks on Accept/Print and Fax/Reject during the enrollment, a new contract is created.

Setting up program contracts involves two tasks:

- Setting up contract templates
- Setting up contract approval options

Setting up Contract Templates

For a contract to be available in Oracle Partner Management, the channel administrator or a user with access to Oracle Contract Management must create contract templates under the Partner Contracts category. Contract templates are created and stored in the Oracle Contract Management Core application.

The legal terms that a vendor organization wants partners to agree to might differ based on a partner's geographic location or partner member type. Thus, numerous partner program contract templates may need to be set up in Oracle Contract Management. The channel manager then selects the contracts that he wants to associate with a specific partner program based on geographic and partner member type criteria.

For more information on working with contracts, refer to the *Oracle Contract Management Implementation Guide*.

Setting up the Contract Approval Option

Some vendor organizations delay approving partner program enrollment requests until a signed contract is received from the partner. However, other organizations allow approvers to approve an enrollment request before the signed contract is received.

To specify whether or not an enrollment request can be approved without a signed contract, the channel administrator sets the profile option PV: Allow Approval without Contract:

- Yes: Approver can approve the enrollment request before the signed contract is received.
- No: The signed contract must be received before the enrollment request can be approved. If this value is selected, the approver must indicate that the contract has been received by making the appropriate selection on the Approval Checklist for the partner program. The system will check for this selection before allowing the enrollment's status to change to Approved.

Setting Up Partner Program Overviews

When a vendor user creates programs, he can create a program overview that provides partners with a summary of the program. The program overview is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. Channel managers set up the program overview, which can include images as well as text.

The content for the program overview is stored in the Oracle Content Manager application, although the text and images are entered by channel managers through Oracle Partner Management. During implementation, the channel administrator needs to perform two tasks to make sure that program overviews can be created and stored properly:

- Adjust permissions in Oracle Content Manager so that channel managers can access and store program overview information.
- Enable or disable rich text formatting for the overview, depending on business requirements.

Although the Oracle Content Manager application provides a content approval process, we are not using it in Oracle Partner Management. No separate approval is required for a program overview.

Granting Vendor Users Oracle Content Management Access

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

Navigation

Log in to Oracle Content Management with the Content Super User responsibility.

Prerequisites

None

Steps:

1. From the Root directory level, select the PR_PRGM directory from the list of subdirectories.
2. Click Folder Properties. The Folder Properties page appears.
3. In the Permissions section, click Add Another Row, if necessary, and add the user (for example, the name of a channel manager), resource group, or responsibility for which you want to set up permissions.
4. Select the permission level:
 - To grant full access to the folder, select all the available permissions.
 - To restrict permissions, select the applicable permissions only.

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

Setting up the Program Overview Text Editor

A rich text editor can be used to create a program overview. The editor offers the ability to add images and formatting to a program overview, which can cause accessibility challenges for some users. The channel administrator can change the text editor used

for the overview, if required, by changing the setting of the Self Service Accessibility Features profile option.

The following settings are available for the profile option:

- **NONE:** Enables the rich text editor, and makes the accessibility-specific features unavailable.
- **Screen Reader Optimized:** Content is optimized for reading on a computer screen.
- **Standard Accessibility:** Accessibility compliant mode.

Mapping Partner Responsibilities to Programs

Partner user responsibilities can be associated with partner programs. When a partner organization's enrollment in a program is approved, the responsibilities associated with it are granted to the partner users. The channel administrator is responsible for mapping programs and responsibilities.

Mapping responsibilities to programs provides a way to make the information associated with a partner program visible to partner users from the Partner Dashboard. For example, when a partner organization becomes enrolled in a program that provides opportunity management benefit, the Opportunities bin becomes visible for the partner organization's users.

Responsibility mapping associates a responsibility with one of the two partner resource roles: Primary User or Business User. To help vendor organizations further control the information available to partner users, geographic location can also be used to determine the responsibility that a partner user will receive. The geographic information available for responsibility mapping is set up in the Oracle Marketing application.

Creating a New Responsibility

By default, each new partner user is assigned one of the following resource role and responsibility combinations:

- Primary User role and Partner Super User responsibility
- Business User role and Default Partner User responsibility

Some organizations choose to simply map the Partner Super User responsibility to all partner programs. Other organizations opt to create new responsibilities that allow them to limit what partner users can see.

To create a new partner responsibility, it is recommended that you start with the Partner Super User responsibility and exclude functions, as appropriate, to limit what the user can see.

The channel administrator must perform the following to make the responsibility available from the list of values that appears on the Create Responsibility Mapping Setup page:

- Make sure that the responsibility's application is set to Oracle Partner Relationship Management.
- Set the responsibility's profile option PV: Is External Responsibility to Yes at the responsibility level.

When the channel administrator adds, changes, or deletes a responsibility, the concurrent program PV - Assign/Revoke user responsibilities runs automatically. This program

updates partner responsibilities, assigning or revoking responsibilities to partner users as appropriate.

Mapping Responsibilities

When setting up role and responsibility mapping, an organization can use geographic criteria to further control the information that a partner user can access. The application matches the partner's identifying address to the most-granular geographic level. Thus, more than one responsibility and role combination can be mapped to a partner program, and the different responsibilities can be assigned to partner users based on the geographic location of the partner.

Use this procedure to map responsibilities to partner programs.

Prerequisites

The responsibility must be set up as a Oracle Partner Relationship Management responsibility with the profile option PV: Is External Responsibility set to Yes. Additionally, the partner program must be set up.

Navigation

Log in as the channel administrator and navigate to Programs > Responsibility Mappings and then click Create Mapping to display the Create Responsibility Mapping Setup page.

Notes

- **Geography:** Select the geographic criteria that will be associated with the responsibility. The application will use the partner's geographic information (usually the identifying address) when assigning responsibilities.

You should make sure to set up the two default role and responsibility combinations at the highest level in the geographic hierarchy (for example, the World level). This ensures that all partner users will automatically be assigned a role and responsibility, even if their organizations are not yet enrolled in a partner program.

- **Location:** Select the location from the list. The location choices available in the list are determined by the Geography criteria selected previously.

TCA Events and Subscriptions

There are a number of TCA events and subscriptions associated with partner programs.

Relationships

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

- oracle.apps.ar.hz.relationship.update
- oracle.apps.ar.hz.relationship.create

Change in Partner Address

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

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

The above subscription is seeded out of the box.

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

Partner Invitations

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

Profile Options

There are certain system profile options that must be set for Partner Programs to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, "System Profile Option", page A-1 for a complete list of profile options for Partner Programs.

Lookups

There are several Lookups that need to be set up for Partner Programs. Refer to Appendix B, "Lookups", page B-1 for additional information.

Concurrent Programs

There are several concurrent programs that need to be run periodically for Partner Programs. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting Up Partner Program Enrollments

This chapter covers the following topics:

- Overview
- Creating a Partner Program Enrollment Site
- Setting Up Address Validation
- Setting Up Oracle Order Management
- Setting Up Oracle iPayment Server
- Setting Credit Card Profile Options
- Setting Up Runtime Variables
- Setting Up Tax Rules
- Setting Up Enrollment Request Approvers
- Users and Security

Overview

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

After an organization has registered with the vendor as a partner, programs that the partner is eligible for appear in the Available Programs bin on the Partner Dashboard. A partner user can enroll her organization into a program listed in the bin. The enrollment request is then routed to an approver, who is a vendor user. If the partner's enrollment is approved, the partner receives the benefits associated with program membership, for example, the ability to submit special pricing requests or to request funding for marketing activities. Partner who are distributors can in turn invite their partners to join partner programs.

When a partner user initiates the program enrollment process, she is prompted through a series of enrollment-related web pages. Depending on the partner program, the enrollment process can involve some or all of the following:

- A program overview page, which describes the program benefits and requirements and other information provided by the program creator.
- An enrollment questionnaire, which presents a series of questions that the partner must answer.

- A terms and conditions page, which the partner must agree to.
- If a fee is associated with program membership, the partner user will be asked to submit billing and payment information.

All the program enrollment-related items listed above were set up by either the channel administrator or channel manager as part of the partner program creation process. For more information on creating partner programs, refer to *Setting up Partner Programs*, page 8-1. There are additional set ups that the channel administrator or another vendor employee must complete to enable program enrollment; these are presented in this chapter.

Creating a Partner Program Enrollment Site

During enrollment, a partner user is prompted through the enrollment process on a series of web pages that can be thought of as an enrollment site. The enrollment site is set up from Oracle iStore; templates are provided that the vendor can use to create a customized enrollment process. For more information on using the template and creating the site, refer to *Setting up the Partner Dashboard*, page 6-1.

Setting Up Address Validation

The receivables address validation system option needs to be set up, because address validation is required for payment. A partner's billing address is validated against tax locations that are set up in Oracle Receivables.

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

Setting Up Oracle Order Management

Oracle Order Management is used to process sales orders when a partner submits an enrollment request for a program that contains fees. It is used to process financial liabilities. Oracle Order Management is also used to process orders for different payment modes such as cash, check, credit card and purchase order.

For partner program enrollments, three profile options must be set up to integrate Oracle Partner Management with Oracle Order Management:

- **PV: Default Sales person used for Orders:** Oracle Order Management requires that a salesperson be identified for each order. Depending on business requirements, the salesperson can receive a commission for partner program enrollments; however, if the vendor chooses not to associate a salesperson with program enrollments, a fictional name can be used instead.

The setting for this profile option must be a CRM resource (a fictional resource can be created, if necessary). The profile should be set at the Site level.

- **PV: Order Cancel Reason:** Use this profile option to provide a reason for the cancellation of an enrollment request. This reason will be used when an enrollment request is cancelled because:
 - The partner chose to cancel the enrollment request
 - The maximum number of credit card authorization requests was exceeded
 - An approver rejected the enrollment request

The setting for this profile option is taken from the Order Management CANCEL_CODE Lookup. The profile is set at the Site level.

- **PV: Order Transaction Type:** A partner program is not a shippable item, which must be specified on the order form. Set this profile option to BILL ONLY to indicate that the program is not shippable. The profile is set at the Site level.

For more information on these profile options and on setting up Oracle Order Management, refer to the *Oracle Order Management Suite Implementation Guide* and *Oracle Order Management User Guide*.

Setting Up Oracle iPayment Server

Credit card payments are handled by the Oracle iPayment application. An iPayment user with the Payment Administrator responsibility sets up and maintains the iPayment application and server. For information on setting up and maintaining the iPayment Server, refer to the *Oracle iPayment Implementation Guide*.

Depending on business requirements, an organization might choose to use secure http (https) for enrollment requests, especially for requests that are paid with a credit card. However, https can have a performance impact on a site, so the organization might want to limit https to the payment portion of the enrollment request. For Oracle Partner Management, you can specify whether or not to use https through two profile options:

- **PV: Secure URL:** Use to specify a secure server and port for payment pages.
- **PV: Non Secure URL:** User to specify a nonsecure server and port for other pages.

These two profile options are optional, and are both set up at the Site level. For more information providing settings for the options, refer to Appendix A, "System Profile Options", page A-1.

Setting Credit Card Profile Options

The vendor can choose to limit the number of authorization attempts allows for a single credit card transaction. If a limit is placed on authorization attempts, and the number of allowable attempts has been exceeded, the enrollment request will be ended, and the user will be returned to the Partner Dashboard. However, the enrollment registration information is saved, including the contract information. In addition, Oracle Order Management saves the billing information.

The number of allowed authorization attempts is specified using the profile option PV: Max number of credit card authorization. This profile is set at the Site level, and the setting is a numeric value.

Setting Up Runtime Variables

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

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

Setting Up Tax Rules

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

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

Setting Up Enrollment Request Approvers

Partner program enrollment requests are subject to an approval process. When a partner user submits an enrollment request, it is routed to an approver, who is a vendor user. The approver can approve, reassign, or reject the request. The partner program enrollment approvals process is set up and managed through the Oracle Approvals Management application.

The seeded transaction for enrollment requests is PV: Partner Program Enrollment Requests. Numerous attributes have been defined for this transaction. A default program enrollment request approver can be identified using the PV: Default Enrollment Request Approver profile option. For more information on setting up approvals for program enrollment requests, refer to *Creating Approval Rules in Oracle Approvals Manager*, page 3-2 .

Users and Security

The channel administrator can designate one or more vendor users as partner program enrollment administrators. Administrators can see all enrollment requests in the system, whereas other users can only see the enrollment requests for which they are approvers, or the enrollment requests submitted by partners to which they have access.

A partner program enrollment request administrator is designated by giving a Oracle Partner Management vendor user the resource role Vendor Administrator. The user can have other Oracle Partner Management vendor user roles as well.

Setting Up Opportunity Assignment

This chapter covers the following topics:

- Overview
- Opportunity Matching and Routing
- Setting Up Partner Matching Rules
- Setting Up Manual Matching Options
- Setting Up Timeouts
- Setting Up Channel Types
- Specifying Status Notification Recipients
- Modifying Status Notifications
- Opportunity Events
- Users and Security
- Profile Options
- Concurrent Programs

Overview

A sales opportunity is a pending sale that can be forecasted. Oracle Partner Management extends the Oracle Sales opportunity module to support the assignment of indirect opportunities to partners. An opportunity can originate from a lead or a marketing campaign, or it can be entered manually by a user.

Oracle Partner Management allows a vendor organization to set up rules that simplify the process of identifying the best partner or partners for an opportunity and subsequently routing the opportunity to the appropriate partner. Partner Management Opportunity Management module provides a flexible mechanism to control the distribution of notifications associated with opportunities.

Oracle Partner Management integrates with two Oracle sales applications: Oracle Sales Online (which is also called Oracle Field Sales) and Oracle Sales. If your organization is integrated with Oracle Sales, additional implementation steps may be required for proper integration of the applications. Refer to Oracle Sales Integration, page 16-1 for more information.

Opportunity Matching and Routing

Opportunity **matching** refers to the process of identifying a partner to whom an opportunity should be offered. Opportunity Management allows the vendor to create rules that identify the best partner for an opportunity based on opportunity criteria, partner criteria, and geographical criteria. An opportunity matching rule can also specify tiebreak criteria.

Opportunity **routing** refers to the process of offering an opportunity to one or more partners. Routing can be done manually by a vendor user, or automatically. Automatic routing can be set up as part of a matching rule.

Refer to Setting up Partner Matching Rules, page 10-4 for instructions on creating matching rules.

Automated Matching and Routing Methods

Opportunity matching and routing can be partially or completely automated. There are three levels of automated matching and routing:

- Semi-automatic
- Fully-automatic
- Automatic Background

Semi-automatic

With semi-automatic matching, a user selects which matching rule will be used to generate a list of partners. The user is responsible for completing the routing manually.

Semi-automatic matching requires that the channel administrator set up at least one matching rule. The profile option PV: Matching Rule Selected by Engine must be set to No (No is the default value). In addition, the profile option PV: Rule for Automatic Matching must be set to specify which rule will be used for matching.

Fully-automatic

With fully-automatic matching, a user initiates the matching process but the Rules Engine selects the best matching rule based on the opportunity's attributes, and then generates a list of partners. The user is then responsible for completing the routing manually.

To implement fully-automatic matching, the channel manager creates matching rules and sets the PV: Matching Rule Selected By Engine profile option to Yes.

Automatic background

With automatic background matching, no user intervention occurs. Automatic background matching is used for opportunities that resulted from the lead to opportunity conversion process.

In automatic background matching, a workflow background process, either initiated by a user or scheduled to run at regular intervals, queries all opportunities in the indirect channel, determines the best partner(s) for each opportunity, and routes the opportunities based on the routing rules.

To implement automatic background matching, the channel manager creates matching rules that contain partner routing criteria (routing criteria is optional for other types of matching). Two profile options must be set up:

- **PV: Partner Matching Type.** Determines how the matching engine will evaluate opportunities against opportunity selection criteria. This optional profile has two settings:
 - **Exhaust all rules.** The matching engine evaluates each rule (that matches the conditions specified in the Opportunity Selection criteria), by order of precedence, until it finds a rule that identifies a partner.
If a preferred partner was specified by the rule, the evaluation stops at the first rule even if it does not return a partner.
 - **Stop at first rule.** The matching engine uses the first rule that it finds that matches the opportunity based on the Opportunity Selection criteria. The engine stops even if a partner is not identified.
- **PV: Default Batch Assignment User.** Identifies a user who has access to an opportunity that failed to complete the lead to opportunity routing process. The user becomes a member of the failed opportunity's sales team.

Routing Types

Routing refers to the process of distributing an opportunity to one or more partners that have been identified as appropriate matches. Oracle Partner Management supports several routing types:

- **Single:** An opportunity is routed to one partner only. If multiple partners have been identified as a potential matches, the "winner" is selected randomly.
- **Serial or Single-Serial:** When the matching rules identify more than one partner for an opportunity, the opportunity is offered to one partner at a time from the list. If the highest ranking partner declines it, the opportunity is offered to the second ranking partner and so on until a partner accepts it. Once a partner accepts the opportunity, partners further down in ranking do not see the opportunity.
- **Multiple-Parallel or First Come First Serve:** You can also route the opportunity to multiple partners simultaneously. The first partner to accept the opportunity wins it, and the other partners are removed from the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner list.
- **Multiple Joint or Joint:** This option supports collaborative selling. The opportunity is offered to multiple partners for fulfillment, and multiple partners can accept and work jointly to win and fulfill the opportunity.

Manual Matching

Manual matching allows a vendor user to identify a partner match for an opportunity independently of established matching rules. To perform a manual match, the user selects criteria that will be used to search for potential partner matches for an opportunity. The partner criteria available are partner profile attributes that have been enabled for opportunities and matching services.

The criteria available for manual partner matching can be limited by responsibility. For example, an organization might want channel managers to be able to identify partner matches using all available partner criteria, but might want only a subset of the criteria to be available to channel representatives for matching.

For information on setting up manual matching, refer to Setting up Manual Matching Options, page 10-8.

Setting Up Partner Matching Rules

Matching rules make it easy for a vendor organization to offer opportunities to the most appropriate partners. A matching rule evaluates specific opportunity criteria, evaluates it against specific partner criteria, and then determines which partner or partners, out of all available partners, is a best fit for the opportunity.

Channel administrators are responsible for creating matching rules. The rule creation process involves specifying various criteria, and is spread across multiple pages. Creating a matching rule involves the following procedures:

- Creating a new rule
- Adding opportunity selection criteria to the matching rule
- Adding partner selection criteria to the matching rule
- Adding partner matching criteria to the matching rule
- Adding geographic proximity to the matching rule
- Adding tiebreak criteria to the matching rule
- Adding routing information to the matching rule

Creating a New Rule

The first step in rule creation is naming the rule and providing basic information about it.

Navigation

Log on with the channel administrator responsibility, and navigate to Opportunity Routing > Partner Matching Rules, and click Create

Prerequisites

None.

Notes

- **Currency:** Identifies the currency used for each currency condition that is added to the rule.
- **Precedence:** A higher-numbered precedence rule is evaluated before lower-numbered precedence rules when the partner matching engine is trying to identify the most appropriate rule to apply for each opportunity.
- **Owner:** By default, the owner is the person creating the rule. A different owner can be selected, if necessary.
- **Create:** Click to move to the next step.

Adding Opportunity Selection Criteria to the Partner Matching Rule

Opportunity selection criteria is used by the matching engine to determine if a rule applies to an opportunity. Opportunity selection criteria are opportunity profile attributes, such as Customer Country or Total Purchase Amount. You select one or more attributes and then further define conditions for the attribute, such as “equal to,” “between,” or “greater than.”

Prerequisites

Partner profile attributes must be set up and a partner matching rule must exist.

Steps:

1. At the Partner Matching Rules page, click the name of the rule you created in the previous procedure.

The Edit Matching Rule page appears, displaying links for additional rule creation steps at the top of the page.

2. Click **Opportunity Selection**.
3. In the Opportunity Selection page, click **Add Attributes**.

The Add Opportunity Selection Attributes page appears.

4. On the Attribute Page complete the following:
 1. Select the attribute category, if you know it, from the first drop-down list, or select the blank option to display all attributes. Attributes that belong to the selected category are displayed.
 2. Select the attribute from the second drop-down list. Appropriate conditions and values for the attribute are displayed. The conditions field displays different values depending on the attribute selected.
 3. Select conditions and values for the attribute.
 4. Click **Apply** to add this attribute or click **Apply and Add Another** to add this Attribute and display a new Attribute page.

Adding Partner Selection Criteria to the Partner Matching Rule

The conditions specified in the partner selection section defines a group of partners that are eligible to receive the opportunity. Partners selection criteria are partner profile attributes that have been selected for opportunities and enabled for Matching Services.

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

Prerequisites

Partner profile attributes must be set up and a partner matching rule must exist.

Steps:

1. Click the Partner Selection link.
2. On the Partner Selection page, click **Add Attribute**.

The Add Partner Selection Attributes page appears.
3. On the Add Partner Selection Attributes page, complete the following:
 1. The first drop-down lists the attribute categories. Select the category if you know it or select the blank option to display all attributes. Attributes that belong to the selected category are displayed.
 2. Select the attribute from the second drop-down list. Appropriate conditions and values for the attribute are displayed. The conditions field displays different values depending on the attribute selected.
 3. Select conditions and values for the attribute.
 4. Click **Apply** to add this attribute or click **Apply and Add Another** to add this Attribute and display a new Attribute page.

Adding Partner Matching Criteria to the Partner Matching Rule

Partner matching criteria helps vendors refine the partner search. In this step, attributes selected for the opportunity are compared to attributes selected for the partner to determine a best partner match for the opportunity. For example, the vendor can decide that the customer address must be in the same state as the partner address, or the customer industry needs to match the partner's target industry.

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

Prerequisites

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

Steps:

1. Click **Matching Criteria**.

The Matching Criteria page appears.

2. Select an attribute from the drop-down list in the Opportunity Attribute column. The window refreshes as the Matching drop-down list is populated.
3. Select an operator from the Matching Condition drop-down list. The values in the Matching Conditions drop-down list are determined by the attribute selected in the Opportunity Attribute.
4. Select a related attribute from the Partner Attribute column. Attributes displayed in the drop-down list of Partner Attributes are attributes that have the same return type as the attribute selected in the Opportunity Attribute column.

Adding Geographic Proximity to the Partner Matching Rule

Geo-proximity criteria can be specified in a rule to match an opportunity to the partner who is closest to the customer, or to limit the pool of potential partner recipients to those that are within a specified distance.

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

Prerequisites

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

Steps:

1. Click **Geo-Proximity**.

The Geographic Proximity page appears.

2. Enter a distance value in the Select Partner Within field.
3. Select a distance denomination of either miles or kilometers.
4. In the Select Nearest field, enter the maximum number of partners that should be returned. For example, enter 10 to indicate that you want to limit the matches to the closest 10 partners.

Adding Tiebreak Criteria to the Partner Matching Rule

Tiebreak criteria must be added to a rule if you want the rule to identify a single winner or to produce an ordered list of winners. Tie break criteria uses partner attributes to

determine the best partner when more than one partner is equally qualified according to the other matching criteria.

Because the attributes used for tie breaking must provide a way to measure a partner's performance, the attributes that can be used are limited to those with a numeric or date display style. When an attribute with a numeric display style is set up, a value type of minimum or maximum can be specified. A value type of maximum indicates that, when the attribute is used in tie breaking, the partner with the maximum value will win. A value type of minimum indicates the opposite.

When setting up tie break criteria, the channel administrator assigns a rank to each attribute. The rank indicates the importance of the attribute in the tie breaking process. The matching engine evaluates the attribute with the lowest rank first; if a winner can be determined using this attribute, the matching is complete. If no winner emerges using the first attribute, the next-lowest ranked attribute is used to identify a winner, and so on, until a winner emerges. If no winner emerges, the engine selects a partner by random.

Use this procedure to assign tiebreak criteria to the rule.

Prerequisites

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

Steps:

1. Click **Tiebreak**.
The Tiebreaker page appears.
2. Select an Attribute from the drop-down list and enter a rank for the attribute.

Adding Routing Information to the Partner Matching Rule

Routing rules are used if matching and routing of opportunities to partners will be performed in the automatic background mode, with no user intervention.

Use this procedure to assign routing information to the rule.

Prerequisites

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

Steps:

1. Click **Routing**.
The Matching Routing page appears.
2. Select the Routing Type from the drop-down list.
3. Select the Bypass Channel Manager Approval check box to skip channel manager approval for this rule.
4. Enter the Channel Manager Time-Out in days or hours.

Channel Manager Time-Out specifies the number of days or hours that the channel manager has to review and approve or deny the routing (if channel manager approval is not disabled). If the channel manager does not respond in the specified time, the opportunity is routed automatically.

5. Enter the Partner Time-Out in days or hours.

Partner Time-Out specifies the number of days or hours that the partner has to accept or reject the opportunity. If the partner fails to respond in the specified time period, the opportunity is withdrawn automatically.

Note: The time-out periods specified for a matching rule are independent of the other timeout periods that can be specified for opportunities. When routing occurs automatically as a result of automatic background matching, the timeout periods specified by the rules are used; other timeout periods are ignored. Refer to Setting up Timeouts, page 10-8 for additional information.

Setting Up Manual Matching Options

For manual matching of partners, all active partner attributes that are enabled for matching are exposed by default on the manual search screen. The channel administrator can restrict this list by identifying partner attributes to be exposed at a responsibility level.

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

Navigation

Navigate to Opportunity Routing > Manual Matching Setup.

Prerequisites

None.

Notes

- **Responsibility:** Select the responsibility from the drop-down list. Separate manual matching rules can be set up for each responsibility that appears in the list.
- **Rank:** The rank determines the order in which the partner attributes are displayed on the manual search screen that the user sees. If the profile PV: Enable Partial Matching of Attributes is Yes, and partners are not found for the current search conditions, the lowest ranked condition is dropped and the search is performed again. This process continues until at least one partner is found or all the search conditions are exhausted.

Setting Up Timeouts

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

- **Channel Manager Timeout:** Limits the time period a channel manager can hold a matched opportunity before it is forwarded to the assigned partner. If the channel manager does not process the opportunity, the routing status is automatically changed to Offered and the opportunity is routed to the partner.
- **Partner Timeout:** Limits the time period during which a partner can respond to an offered opportunity before it is recycled and offered to another partner.

There are three ways that timeout periods can be specified:

- **By a routing rule.** Timeout periods specified as part of a routing rule apply to opportunities that are routed by automatic background matching only.
- **For individual countries.** From the Timeout Setup page, the channel administrator can assign timeout periods for individual countries. For Channel Manager

Timeouts, the country corresponds with the country of the customer associated with the opportunity. For Partner timeouts, the country corresponds to the partner's country. In situations where multiple partners in different countries are offered the same opportunity, the longest timeout period is assigned to all partners, regardless of their country. These timeout periods apply to opportunities offered through semi-automatic and fully-automatic matching and manual matching. Specifying country-specific timeout periods is optional.

- **Through profile options.** Two profile options, PV: Default CM TimeOut and PV: Default Partner TimeOut, control timeout periods. If timeouts are not set up at the country level, these profile options are used to specify channel manager and partner timeout periods. The default timeout periods apply to opportunities offered through semi-automatic and fully-automatic matching and manual matching.

Setting up Country-Specific Timeout Periods

This procedure sets up timeout periods at the country level. Timeouts set at the country level have precedence over default timeouts that are specified through profile options.

To set up country specific timeouts, navigate to Opportunity Routing > Timeout Setup and follow the on-screen instructions.

Setting Up Channel Types

A vendor organization can create channel types that reflect its business processes. In addition, Oracle Partner Management seeds several channel types.

Channel types are used by the lead engine and partner matching engine to identify which opportunities are indirect and should be assigned to partners. Each channel must be defined as either a direct or an indirect channel

Navigation

Navigate to Opportunity Routing > Channel Setup.

Prerequisites

None.

Notes

- **Precedence:** Precedence is used to determine the winner if there is a tie between channels for an opportunity.

Specifying Status Notification Recipients

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

The user types are:

- Channel manager
- Assignment Manager - User that initiates the opportunity routing to partner.
- Partner - Partner contacts on the opportunity sales team.

- Other - Internal sales representatives that are neither channel managers nor assignment managers.

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

From the Status Notification page, the channel manager can add and remove user types from the list of recipients. To access the Status Notification page, navigate to Opportunity Routing > Status Notifications.

Modifying Status Notifications

The status notification messages that are sent to recipients in response to changes in opportunity and routing status are created and stored in Oracle Workflow Builder. You might be able to implement the notifications that have been seeded for Opportunity Management without modification. However, if you need to make changes to the seeded notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database. You can not add new notifications for opportunities.

For more information about modifying status notifications, refer to Setting up Notifications in Oracle Workflow Builder, page 3-8.

Opportunity Events

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

- Opportunity <opportunity number> has been assigned
- Opportunity <opportunity number> approved by Channel Manager
- Opportunity <opportunity number> approved by Channel Manager for Partner
- Opportunity <opportunity number> approval by channel manager bypassed
- Opportunity <opportunity number> match rejected by Channel Manager
- Opportunity <opportunity number> approval by channel manager timed out
- Opportunity <opportunity number> offered has been accepted by another partner
- Opportunity <opportunity number> matched has been withdrawn
- Opportunity <opportunity number> is offered to <partner>. Opportunity routing status changed to <opportunity status>.
- Opportunity <opportunity number> offered has been withdrawn
- Opportunity <opportunity number> abandoned
- Opportunity <opportunity number> accepted
- Opportunity <opportunity number> created by partner

- Opportunity <opportunity number> declined by partner
- Opportunity <opportunity number> awaiting partner acceptance timed out
- Opportunity <opportunity number> is closed as won. Status is <opportunity status>
- Opportunity <opportunity number> is closed as lost. Status is <opportunity status>
- Order is placed from won opportunity. Customer <customer> placed order for opportunity <opportunity number>
- Opportunity <opportunity number> status changed to <opportunity status>

Users and Security

In Oracle Partner Management, users' access to opportunities is based on the Oracle Sales team security model.

Opportunity Owner

When a user creates a lead or opportunity, the user is added to the sales team automatically, with the Do Not Reassign flag selected. The user is identified as the opportunity owner.

Opportunity Access Security

There are two levels of access to opportunity information:

- **Full:** The user has Update access for all opportunities.
- **Sales Team:** The user has Update access to all opportunities for which he is on the sales team with the Full Access flag selected. The user has read-only access for all opportunities for which he is on the sales team with the Full Access flag deselected.

The levels of access that a user has are determined by the setting of the profile option ASN: Opportunity Access Privilege:

- **Vendor Users:** The profile option should be set to Full at the Responsibility level for each responsibility that is assigned to vendor users.
- **Partner Users:** The profile option should be set to Sales Team at the Responsibility level for each responsibility that is assigned to partner users.

Customer Access Security

There are two levels of access to customer information:

- **Full:** The user has Update access for all customers.
- **Sales Team:** The user has Update access to all customers for which he is on the customer sales team with the Full Access flag selected. The user has read-only access for all customers for which he is on the customer sales team with the Full Access flag deselected.

The levels of access that a user has are determined by the setting of the profile option ASN: Opportunity Access Privilege:

- **Vendor Users:** The profile option should be set to Full at the Responsibility level for each responsibility that is assigned to vendor users.

- **Partner Users:** The profile option should be set to Sales Team at the Responsibility level for each responsibility that is assigned to partner users.

Partner Contact Security

A partner user with the PV_OPPTY_CONTACT permission is designated as the partner's opportunity contact, and is always added to the sales team of an opportunity. By default, the partner with the PV_PARTNER_PRIMARY_USER permissions-based role has this permission.

Profile Options

There are certain system profile options that must be set for Opportunity Management to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for Opportunity Management.

Concurrent Programs

There are several concurrent programs that need to be run periodically for Opportunity Management. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting Up Referral Management

This chapter covers the following topics:

- Overview
- Setting Up Budgets
- Setting Up Offers
- Setting Up Claims
- Enabling Profile Attributes for Referrals
- Defining Product Categories
- Setting up Approvals
- Setting up Notifications
- Setting up Territories
- Setting up Data Quality Management (DQM)
- Setting up Notes
- Creating a Referral Benefit
- Specifying a Sales Channel
- Users and Security
- Profile Options
- Lookups
- Concurrent Programs

Overview

Referral Management enables partners to refer leads and opportunities to the vendor that the partners cannot fulfill directly. For example, if a customer is interested in one of the vendor's products that the partner does not sell, the partner can submit a referral to the vendor and receive a percentage of the revenue.

When a partner user submits a referral, it is routed to the appropriate vendor approver(s). Approvers are notified of the referral and they review it and approve, reassign or decline it. The vendor also performs customer and contact duplicate checking using Oracle Data Quality Management to determine if the same lead or opportunity already exists in the system. If the referral is unique and meets other vendor

qualifications, it is approved, and a lead or opportunity is generated. The new lead or opportunity contains a link to the original referral information.

After an order is generated, and the product is shipped to the customer, a claim is generated in the system. After the claim is approved internally, the partner receives notification to review and accept compensation. After a partner user accepts the compensation, the vendor pays the commission.

Referrals are integrated with Oracle Sales and Oracle Leads Management, which allow opportunity routing and lead qualification processes to occur successfully for referrals.

Vendor and partner users can access a summary list of referrals to which they have access. They can build personal views to quickly find referrals that they are most interested in.

Setting Up Budgets

A budget is a pool of money that vendors can use to execute trade promotion activities such as offers and campaigns. Because partners receive compensation for referrals, one or more budgets must be specified to fund referral compensation. Referral budgets are fixed budgets and have to be active in to be selected in the referral benefit. Accruals are created for each order line that matches between customer orders and referred products submitted.

An organization can create budgets specifically for referrals, or fund referrals from an existing budget. Use the following procedure to create a fixed budget for referral compensation.

Navigation

Log into Oracle Trade Management as the Oracle Trade Management User and navigate to Budget > Create, and then click Create to display the Create Budget page.

Prerequisites

A set of books must be defined.

Notes

- **Setup Type:** Select Fixed Budget.
- **Number:** If you leave the budget number field blank, a unique number is generated automatically for the budget.
- **Business Unit:** Business units are organizations that are set up in Oracle Human Resources with Type - Business Unit. Business units are used mainly for classification purposes. Business units can also affect approval rules.
- **Category:** Select the appropriate category for the referral budget. An approval rule for a budget can use category as one of its criteria.
- **Holdback Amount:** The amount of funds to be reserved and not allocated to lower levels. A budget administrator can choose to reserve or release the holdback amount at any time by manually reducing the original holdback amount.
- **Owner:** By default, the owner is the user creating the budget. A different owner can be specified.
- **Start Date and End Date:** These dates are mapped in the Oracle General Ledger calendar, and limit the start and end dates of budgets.

Setting Up Offers

When a partner referral request is approved, an offer is created in Trade Management. The seeded custom setup Net Accrual Offer is used with partner referrals. When a partner's referral request is approved, a net accrual offer based on this custom setup is created automatically. The offer is used to track funds committed for the referral request.

By default, the Budget Approval process has been disabled for the New Accrual offer. Depending on business requirements, budget approval can be enabled for the offer, and then the vendor can set up an approval process for partner referral budgets.

It is not recommended that you create additional offers for partner referrals.

Setting Up Claims

A default claim (which is called Claims) is available in Trade Management as a custom setup. This default claim is used for all flows that require a party (for example, a partner) to submit a claim to be reimbursed for a marketing activity or other situation.

When a referral request is approved, a Net Accrual offer is created. The offer creates an authorization code. When a partner user submits a claim for reimbursement for closed business resulting from her referral, she must include the authorization code on the claim to link the claim with the offer and the approved funding request. Claims are processed through Oracle Accounts Payable or Oracle Accounts Receivable.

The default claim specifies that a number of items will be included in the claim form, including team information, notes, and request history. An organization can also create a customized claim, if required. Creating a custom claim provides the following benefits:

- Since all claims that use the default custom setup have the same prefix, identifying the type of partner request a claim is associated with could become difficult. Creating a customer claim allows you to set up a new prefix that can be used to easily identify partner referral claims.
- Allows you to set up a different approval routing process for different types of claims. The default claim does not implement a claims approval process.
- Allows you to set up a different claim validation process.

Refer to the *Oracle Trade Management Implementation Guide* for additional information on creating custom claims.

Enabling Profile Attributes for Referrals

When a referral benefit is created, the channel administrator can create questions that a partner user must answer when submitting a referral request. The questions are associated with partner profile attributes, and the answer the partner user provides for the questions are used to populate the profile attributes for the partner. In addition, some of the partner profile attributes can be mapped to the opportunity or lead generated as a result of a referral.

The following table lists the seeded partner profile attributes that are enabled for use with referral benefits. The channel administrator can also create custom attributes that can be used with referrals. To enable a custom attribute for referrals, the Lead Referral

checkbox must be selected for the attribute. For more information on working with partner profile attributes, refer to Setting up Partner Profile Attributes, page 5-1.

Seeded Partner Profile Attributes Enabled for Referral Benefits

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

Defining Product Categories

When the channel administrator creates a referral benefit, she specifies one or more product categories for the benefit. The product categories determine for which products a vendor can refer a lead or opportunity.

The product categories that a channel administrator can choose from are presented in a hierarchy that is relevant for the referral. This information is used as the basis for approving a referral, identifying orders that directly result from a referral, and computing the compensation amount due to the partner.

Product categories are set up in the Oracle Advanced Pricing application, and are common across all of an organization's product lines. For information on defining product categories, see *Oracle Advanced Product Catalog User Guide*.

Setting up Approvals

Partner lead and opportunity referral requests are subject to an approval process. When a partner user submits a referral request, it is routed to an approver, who is a vendor user. The approver can approve, reassign, or reject the request. The partner referrals approvals process is set up and managed through the Oracle Approvals Management application.

In addition to validating the information submitted by a partner user, referral approvers must perform checks for duplicate referrals, duplicate customers, and duplicate customer contacts. If a duplicate referral is identified, the referral request is rejected. If a duplicate customer or customer contact is identified, the approver links the referral with the existing customer information. He must also make sure that the referral is not for a lead or opportunity that already exists.

The seeded transaction for partner referral requests is PV: Referral Management Approvals. Numerous attributes have been defined for this transaction. A default referral request approver can be identified using the PV: Default Referral Approver profile option. For more information on setting up approvals for lead and opportunity referrals, refer to *Creating Approval Rules in Oracle Approvals Manager*, page 3-2.

Setting up Notifications

Notification messages are sent to vendor and partner users in response to a number of partner referral request status changes. Notification messages for partner referral requests are created and stored in the Oracle Workflow Builder application. An organization might be able to implement the notifications that have been seeded for referrals without modification. However, if you need to make changes to the seeded notifications, such as changing the message text, adding URLs to messages, or even creating additional notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database.

In Workflow Builder, the item type for referral notifications is PVREFFRL. The following table lists the notifications seeded for referrals and lists the types of users that are eligible for each notification and the referral request status that is applicable for the notification.

Notifications for Partner Referrals

Notification Name	User	Referral Request Status
Referral Created - Partner Notification	Partner Contact, Referral Superuser (Partner)	Pending Approval
Referral Created - Vendor Notification	Vendor Approvers, Vendor Channel Managers, Referral Superuser (Vendor)	Pending Approval
Referral Approved - Requires Customer Deduplication Vendor Notification	DQM Approver, Vendor Channel Managers, Referral Superuser (Vendor)	Pending Customer Review
Acceptance Letter/Referral Commission - Partner Notification	Referral Superuser (Partner), Partner Contact (Partner contact must have the Accept Compensation permission)	Awaiting For Partner Acceptance
Referral Declined - Partner Notification	Partner Contact, Referral Superuser (Partner)	Declined
Referral Accepted - partner Notification	Partner Contact, Referral Superuser (Partner)	Approved

Setting up Territories

A territory hierarchy must be set up for lead and opportunity referral requests. For referrals, a territory hierarchy allows the vendor organization to offer different referral benefits based on customer country. For example, the vendor might want to allow referrals on different products in Canada than in the United States, or source referral compensation from different budgets for different countries. The territories must be set up at the country level.

The territory hierarchy is set up through the Oracle Territory Management application. As part of implementation, the vendor must set up a territory with the Partner Management usage to create and populate channel teams. The territory that is set up for referrals is a different territory, and is created with the Trade Management usage. If a vendor organization has already implemented Oracle Trade Management, setting up another Trade Management territory is not required. For more information on creating a territory hierarchy, refer to Setting up Territories in Oracle Territory Manager, page 3-6.

Setting up Data Quality Management (DQM)

DQM is a tool from the Oracle Trading Community Architecture (TCA) group that is used to check for potential duplicate customers or contacts for a given customer or contact.

When a lead or opportunity referral is created, the referral request approver must compare the customer or reseller name entered with existing records in TCA. If there are no matches for the customer or the customer contact, a new customer and/or contact are created. If there are matches for the customer, the approver can review and decide to create a new organization or use an existing organization. If the approver creates a new organization, she also creates a new contact.

The approver also uses DQM to identify whether or not the lead or opportunity being referred already exists in the system. If it matches an existing lead or opportunity, the referral request might be declined.

As part of implementation, the channel administrator may need to set up matching rules in DQ. For more information on using DQM and creating rules, refer to *Setting up Matching Rules with Oracle Data Quality Management*, page 3-10.

Note that, for successful partner contact deduplication for referrals, a matching rule containing the "contact name" attribute must be created. If seeded matching rules are being used, the channel administrator may use the `SAMPLE_SEARCH` rule to enable partner contact deduplication, as it contains the "contact name" attribute.

Setting up Notes

Notes can be created for a referral request. By default, all note types that are not specifically associated with another business object are available for referrals. A vendor can create a note type for referral requests to limit the note type choices that a user sees when creating a note for a referral.

For more information about setting up notes and note types, refer to *Setting up Notes*.

Creating a Referral Benefit

The channel administrator is responsible for creating referral benefits, which channel managers can add to partner programs.

There are three basic types of referral benefits, and they are based on the type of sales transactions that result from the approval of the referral:

- **Opportunity:** When the referral is approved, an opportunity is created and linked to the referral.
- **Opportunity assigned to partner:** When the referral is approved, an opportunity is created and is subsequently routed to the partner that originally submitted the referral. The referral is linked to the opportunity.
- **Lead:** When the referral is approved, a lead is created and linked to the referral. The lead can subsequently be qualified, and the resulting opportunity routed to the correct channel.

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

Navigation

Log in as the channel administrator and navigate to *Programs > Benefits*, select *Referral* from the *Create Benefit* drop-down list, and click *Go*.

Prerequisites

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

- At least one budget has been set up for referral compensation.
- The Net Accrual Offer is present.
- At least one product category has been set up.
- At least one territory has been defined with the Trade Management usage.

Notes

- **Sales Transaction:** Select Opportunity, Opportunity assigned to Partner, or Lead from the list depending on desired outcome of the referral benefit.
- **Budgets region:** Select one or more budgets that will provide funds to compensate partners for referrals.
 - **Budget Name:** Select the name of the budget to be used from the drop-down list. The list displays fixed budgets that are active and that the channel administrator has access to. A user has access to a budget if he is the budget owner or is on the access list for the budget.
 - **Requested Budget Amount:** The requested budget amount is the amount of money that should be used to fund referrals created from the benefit. The amount entered here is marked as Committed funds in the budget.

If the profile option OZF: Allow committed budget to exceed total amount is set to No, the requested budget amount can not exceed the amount in the budget. If the profile option is set to Yes, the benefit pass validation in spite of the difference in funds.
 - **Request Status:** This is populated by the system. When the budget passes the validation process, the status is Approved.
- **Additional Details region:** In this section you create questions that will be used by approvers to evaluate the referral. The partner's responses are captured and stored in the partner's profile. In addition, some responses are used to populate fields on the lead or opportunity that is generated upon referral approval. For each question that you add, specify the following:
 - **Label:** This is the label displayed in the referral details under the additional details section when the partner is creating a referral.
 - **Profile Attribute:** Select a profile attribute. The profile attributes list displays seeded attributes that have been seeded for lead or opportunity referrals and custom attributes that are defined to be valid for referrals.
 - **Order:** The order in which the questions will appear on the referral request.
 - **Mandatory:** Select to make a question mandatory.
- **Products region:** The referrals requests created from this benefit are restricted to the product categories specified here. Select the product category and then provide the following information for each category included in the benefit:
 - **Compensation Percentage:** Specifies the referral compensation to be paid to the partners based on a percentage of the net sales amount.
 - **Maximum:** Sets a cap on the referral compensation on a product-by-product basis. For a specific product, the referral compensation for the referral cannot exceed this amount regardless of the compensation percentage specified.
- **Territories region:** In the territories region, you select one or more territories for the benefit from the drop-down list of territories that have been set up for referrals. The customer associated with the referred lead or opportunity must be located in one of the geographic regions specified for the benefit. Territories must be specified for the benefit. Select the territory and then provide the following information:
 - **Threshold:** The threshold is the minimum amount that is allowed for a referral request.

The threshold is the total unit price for all the products listed on the request. For example, a referral for the sale of five laptop computers at a unit price of \$1000 each and 10 desktop computers at unit price of \$500 each has a threshold amount of \$1500, or the total unit price of all the products included in the request.

- **Currency:** Select the currency used for the territory.
- **Action:** Select the error or warning that is used when a referral request does not meet the threshold amount:
 - **Display Error:** An error is displayed, and the request can not be submitted.
 - **Warning to Approver:** The referral request can be submitted for approval, but the approver sees a warning about the threshold.
 - **Warning to Partner and Approver:** The referral request can be submitted for approval, but both the approver and the partner submitting the request see a warning.
- **Expiration (Days):** Optionally, you can specify the number of days that the territory qualifications are in effect.
- **Notifications region:** Select the notifications that will be set to partner and vendor users in response to status changes on referral requests generated from this benefit. For each referral status that for which you want to provide a notification, specify the following:
 - **Status:** Referral status change that requires notification.
 - **User Role:** Group of users that needs to be notified for the corresponding status change.
 - **Notification Name:** The workflow notification message that the user will receive.
- **Apply:** Click to save the benefit.
- **Activate:** Click to run the benefit validation process.

The Benefit Validation Process

During the creation process, a benefit goes through a number of benefit statuses: Active, Inactive, Draft, Failed Validation. When the process completes, the status is updated to Active or to Failed Validation.

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

Once a benefit becomes active, the following conditions hold:

- Budget lines cannot be removed, but new lines can still be added.

- Products and territories can neither be removed nor added.
- New Additional Detail lines cannot be added.
- Notification lines can be added or removed.

Specifying a Sales Channel

When a referral request is approved, an unqualified lead, an unmatched opportunity, or an opportunity for a specific partner is created. The system automatically specifies a sales channel for each lead or opportunity created from a referral request.

When a lead is created, the system assigns the Direct channel to the lead. The lead is then routed to the lead engine, which subsequently qualifies the lead and then assigns a channel to the resulting opportunity.

When an unmatched opportunity is created, the channel is determined by the profile option OS: Default Sales Channel. This profile option is part of the Oracle Sales application. For additional information on this profile option, refer to the *Oracle Sales Implementation Guide*

When a referral generates an opportunity for a specific partner, the system assigns an indirect sales channel to the opportunity. The profile option PV: Default Indirect Channel Type determines the name of the indirect channel that will be used by default for all opportunities that are routed to partners as a result of a referral.

Users and Security

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. In addition, there are two permissions that are associated with partner referral requests:

- 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.

Profile Options

There are certain system profile options that must be set for partner referral requests to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for referral requests.

Lookups

There are some Lookups that can be modified for referral requests. Refer to Appendix B, "Lookups", page B-1 for information about Lookups related to referral requests.

Concurrent Programs

There are several concurrent programs that need to be run periodically for referral requests. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting Up Deal Registration

This chapter covers the following topics:

- Overview
- Enabling Profile Attributes for Deal Registration
- Defining Product Categories
- Setting up Approvals
- Setting up Notifications
- Setting up Territories
- Setting up Data Quality Management (DQM)
- Setting up Notes
- Creating a Deal Registration Benefit
- Specifying a Sales Channel
- Users and Security
- Profile Options
- Lookups
- Concurrent Programs

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 with them directly and to support them on the deal. You increase partner loyalty and gain visibility into partner activity.

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

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

Enabling Profile Attributes for Deal Registration

When a deal registration benefit is created, the channel administrator can create questions that a partner user must answer when submitting a registration request. The questions are associated with partner profile attributes, and the answer the partner user provides for the questions are used to populate the profile attributes for the partner. In addition, some of the partner profile attributes can be mapped to the opportunity generated as a result of a registration.

The following table lists the seeded partner profile attributes that are enabled for use with deal registration benefits. The channel administrator can also create custom attributes that can be used with registrations. To enable a custom attribute for registrations, the Deal Registration checkbox must be selected for the attribute.

Seeded Partner Profile Attributes Enabled for Deal Registration

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

Defining Product Categories

When the channel administrator creates a deal registration benefit, she specifies one or more product categories for the benefit. Partners can then register opportunities that include these products.

The product categories that a channel administrator can choose from are presented in a hierarchy that is relevant for deal registration. This information is used as the basis for approving a deal registration request.

Product categories are set up in the Oracle Advanced Pricing application, and are common across all of an organization's product lines. For information on defining product categories, see *Oracle Advanced Product Catalog User Guide*.

Setting up Approvals

Partner deal registration requests are subject to an approval process. When a partner user submits a registration request, it is routed to an approver, who is a vendor user. The approver can approve, reassign, or reject the request. The partner deal registration approvals process is set up and managed through the Oracle Approvals Management application.

In addition to validating the information submitted by a partner user, deal registration request approvers must perform checks for duplicate opportunities, duplicate customers, and duplicate customer contacts. If the opportunity that the partner is trying to register is already in the system, the registration request might be rejected. If a duplicate customer or customer contact is identified, the approver links the information on the registration request with the existing customer information.

The seeded transaction for registration requests is PV: Deal Registration Management. Numerous attributes have been defined for this transaction. A default registration request approver can be identified using the PV: Default Deal Registration Approver profile option. For more information on setting up approvals for deal registrations, refer to *Creating Approval Rules in Oracle Approvals Manager*, page 3-2.

Setting up Notifications

Notification messages are sent to vendor and partner users in response to a number of deal registration request status changes. Notification messages for deal registration requests are created and stored in the Oracle Workflow Builder application. An organization might be able to implement the notifications that have been seeded without modification. However, if you need to make changes to the seeded notifications, such as changing the message text, adding URLs to messages, or even creating additional notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database.

In Workflow Builder, the item type for deal registration notifications is PVDEALRN. The following table lists the notifications seeded for deal registrations and lists the types of users that are eligible for each notification and the registration request status that is applicable for the notification.

Notifications for Deal Registrations

Notification Name	User	Deal Registration Request Status
Deal Registration Created - Vendor Notification	Vendor Approvers, Vendor Channel Managers, Referral Superuser (Vendor)	Pending Approval
Deal Registration Created - Partner Notification	Partner Contact, Referral Superuser (Partner)	Pending Approval
Deal Approved - Requires Customer Deduplication - Vendor Notification	DQM Approver, Vendor Channel Managers, Referral Superuser	Pending Customer Review
Deal Registration Declined - Partner Notification	Partner Contact, Referral Superuser (Partner)	Declined
Deal Registration Accepted - Partner Notification	Partner Contact, Referral Superuser (Partner)	Approved

The following table lists deal registration statuses and the corresponding code.

Deal Registration Statuses

Deal Registration Status	Deal Code
Closed. Dead Lead	CLOSED_DEAD_LEAD
Closed. Lost Opportunity	CLOSED_LOST_OPPTY
Expired	EXPIRED
Draft	DRAFT
Closed by Vendor	MANUAL_CLOSE
Pending Approval	SUBMITTED_FOR_APPROVAL
Extended by Vendor	MANUAL_EXTEND
Pending Customer Review	APPRVD_PENDNG_CSTMR_DQM
Declined	DECLINED
Approved	APPROVED

Setting up Territories

A territory hierarchy can be set up for deal registrations. For deal registrations, a territory hierarchy allows the vendor organization to offer different registration benefits based on customer country. For example, the vendor might want to allow registrations

on different products in Canada than in the United States. The territory must be set up at the country level.

A territory hierarchy is optional for deal registrations. If no territory is defined, deal registration is enabled for all countries. However, when a territory is used for deal registrations, countries that are not linked to a territory are unavailable.

The territory hierarchy is set up through the Oracle Territory Management application. As part of implementation, the vendor must set up a territory with the Partner Management usage to create and populate channel teams. The territory that is set up for deal registration is a different territory, and is created with the Trade Management usage. If a vendor organization has already implemented Oracle Trade Management, setting up another Trade Management territory is not required. For more information on creating a territory hierarchy, refer to *Setting up Territories in Oracle Territory Manager*, page 3-6.

Setting up Data Quality Management (DQM)

DQM is a tool from the Oracle Trading Community Architecture (TCA) group that is used to check for potential duplicate customers or contacts for a given customer or contact.

When a registration request is submitted for approval, the deal registration request approver must compare the customer or reseller name entered with existing records in TCA. If there are no matches for the customer or the customer contact, a new customer and/or contact are created. If there are matches for the customer, the approver can review and decide to create a new organization or use an existing organization. If the approver creates a new organization, she also creates a new contact.

The approver also uses DQM to identify whether or not the opportunity being registered already exists in the system. If it matches an existing opportunity, the registration request might be declined.

As part of implementation, the channel administrator may need to set up matching rules in DQM. For more information on using DQM and creating rules, refer to *Setting up Matching Rules with Oracle Data Quality Management*, page 3-10.

Setting up Notes

Notes can be created for a deal registration request. By default, all note types that are not specifically associated with another business object are available for deal registrations. A vendor can create a note type for deal registration requests to limit the note type choices that a user sees when creating a note for a registration.

For more information about setting up notes and note types, refer to *Setting up Notes*, page 3-13.

Creating a Deal Registration Benefit

The channel administrator is responsible for creating deal registration benefits, which channel managers can add to partner programs.

Use this procedure to create a deal registration benefit.

Navigation

Log in as the channel administrator and navigate to Programs > Benefits, select Deal Registration from the Create Benefit drop-down list, and click Go.

Prerequisites

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

- At least one product category has been set up.

Notes

- **Additional Details region:** In this section you create questions that will be used by approvers to evaluate the deal registration request. The partner's responses are captured and stored in the partner's profile. In addition, some responses are used to populate fields on opportunity that is generated upon registration approval. For each question that you add, specify the following:
 - **Label:** This is the label displayed in the registration details under the additional details section when the partner is creating a registration request.
 - **Profile Attribute:** Select a profile attribute. The profile attributes list displays seeded attributes that have been seeded for deal registrations and custom attributes that are defined to be valid for deal registration.
 - **Order:** The order in which the questions will appear on the deal registration request.
 - **Mandatory:** Select to make a question mandatory.
- **Products region:** The deal registration requests created from this benefit are restricted to the product categories specified here.
- **Territories region:** In the territories region, you select one or more territories for the benefit from the drop-down list of territories. The customer associated with the registered opportunity must be located in one of the geographic regions specified for the benefit. Territories are optional for deal registration.

Select the territory and then provide the following information:

- **Threshold:** The threshold is the minimum amount that is allowed for a deal registration request.

The threshold is the total unit price for all the products listed on the request. For example, an opportunity for the sale of five laptop computers at a unit price of \$1000 each and 10 desktop computers at unit price of \$500 each has a threshold amount of \$1500, or the total unit price of all the products included in the opportunity.

- **Currency:** Select the currency used for the territory.
- **Action:** Select the error or warning that is used when a registration request does not meet the threshold amount:
 - **Display Error:** An error is displayed, and the request can not be submitted.
 - **Warning to Approver:** The registration request can be submitted for approval, but the approver sees a warning about the threshold.
 - **Warning to Partner and Approver:** The registration request can be submitted for approval, but both the approver and the partner submitting the request see a warning

- **Notifications region:** Select the notifications that will be set to partner and vendor users in response to status changes on registration requests generated from this benefit. For each deal registration request status for which you want to provide a notification, specify the following:
 - **Status:** Deal registration request status.
 - **User Role:** Group of users that needs to be notified for the corresponding status change.
 - **Notification Name:** The workflow notification message that the user will receive.
- **Apply:** Click to save the benefit.
- **Activate:** Click to run the benefit validation process.

The Benefit Validation Process

During the creation process, a benefit goes through a number of benefit statuses: Active, Inactive, Draft, Failed Validation. When the process completes, the status is updated to Active or to Failed Validation.

When a benefit is created, it can be saved in the draft status by clicking Apply. At this point, no validation is done on the benefit. When the channel administrator changes the benefit's status to Active and clicks Apply, the benefit validation process runs. If the benefit passes validation, its status changes to Active. If the benefit does not pass validation, the status becomes Failed Validation. The benefit can still be re-activated by correcting the failed item(s) and reapplying the changes. This process can be repeated until the benefit becomes active.

Once a benefit becomes active, the following conditions hold:

- Products and territories can be neither removed nor added.
- New additional detail lines cannot be added.
- Notification lines can be added or removed.

Specifying a Sales Channel

When a deal registration request is approved, an opportunity is created and routed to the partner that registered the deal. When the system creates the opportunity, it assigns it to an indirect sales channel. The profile option PV: Default Indirect Channel Type determines the indirect channel that will be used by default for all opportunities that created from deal registrations.

Users and Security

Users who are granted access to all opportunities within the sales application can access all registration requests that generated an opportunity. In addition, the Super User Permission (PV_DEAL_SUPERUSER) allows a vendor user to view and update all deal registrations and allows a partner user to view and update all deal registrations owned by his organization.

Profile Options

There are certain system profile options that must be set for deal registration requests to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, “System Profile Options”, page A-1 for a complete list of profile options for deal registration requests.

Lookups

There are some Lookups that can be modified for deal registration requests. Refer to Appendix B, “Lookups”, page B-1 for information about Lookups related to deal registration requests.

Concurrent Programs

There are several concurrent programs that need to be run periodically for deal registration requests. Refer to Appendix C, “Summary of Concurrent Programs”, page C-1 for information about setting up and running the programs.

Setting Up Special Pricing Management

This chapter covers the following topics:

- Overview
- Setting up Special Pricing Budgets
- Offers
- Claims
- Trade Profiles
- Setting up Special Pricing Product Security
- Creating the Special Pricing Responsibility
- Creating the Special Pricing Benefit
- Setting up Approvals
- Setting Up Notifications
- Setting up Data Quality Management (DQM)
- Setting up Notes
- User Security
- OAM Transaction Types and Attributes
- Profile Options
- Lookups
- Concurrent Programs

Overview

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

When a request is submitted, it gets routed to the appropriate approver(s). Approvers are notified of the request and they review the request and approve or decline it. After the special pricing request has been approved, and the partner has closed the sale, he/she can submit a claim to receive the discount that was approved. The claim

is routed to the claim approver who then validates the claim. When the claim gets approved, the vendor pays the discount amount.

Partners receive notifications about the special pricing request activity and can link directly from the notification into the associated special pricing request. Notifications are configured by the vendor and sent when the status changes, for example, when a special pricing request is approved.

Partners can access a summary list of all the special pricing requests that they have access to, in the system. They can build personal views to quickly find the special pricing requests that they are most interested in.

Liability Calculation

In case of special pricing requests, the liability gets created upon approval for each of the products for the total approved discount amount. When a request is linked with another request, the liability is created only for amounts in products, which exceeds the current liability for that product.

For example:

A special pricing request (SPR1234) has been submitted to sell products mentioned in the table below, to a Customer A for the Existing Inventory scenario.

Product	Discount Amount	Units	Discount
Laptop	\$120	10	1000
Desktop	\$100	60	6000

A special pricing request (SPR1235) has been submitted to sell products mentioned in the table below, to a Customer A for the Existing Inventory scenario.

Product	Discount Amount	Units	Discount
Laptop	\$120	11	1100
Desktop	\$100	55	5500

If SPR1234 is approved first and SPR1235 gets linked to SPR1234 because it is a request for the same end-customer deal, when request SPR1235 gets approved, it creates an additional \$100 liability for laptops and an additional liability is not created for desktops.

In the above scenario, the same underlying offer authorization code would be used to track liabilities for both requests and both would have same agreement numbers.

Setting up Special Pricing Budgets

Special pricing requests are funded from one or more budgets. Budgets are set up in the Trade Management application, by a user with the Oracle Trade Management User responsibility.

A special pricing budgets are fixed budgets. A fixed budget is a pool of money with a value greater than zero. When you create a fixed budget, you decide the maximum

amount of funds that it can include (although additional funds can be specified later if needed).

A fixed budget allows the vendor to track the amount of funds that have been committed, used, earned, and paid for from the budget. When the budget is set up, an account can be specified and then used to track liability for the budget.

A budget is specified as a special pricing budget through the OZF: Default budget for special pricing requests. Depending on an organization's business needs, a single special pricing budget can fund all special pricing requests, or multiple budgets can be set up. This option needs to be set for each budget that will fund special pricing requests.

Creating a Special Pricing Budget

Use this procedure to create a new special pricing budget.

Navigation

Log on to the Trade Management application with the Oracle Trade Management User responsibility, and navigate to Budget > Create to access the Create Budget page.

Prerequisites

None

Notes

- **Setup Type:** Select Fixed Budget.
- **Category:** Select the appropriate category for the special pricing budget. An organization can create a category to organize special pricing budgets. Refer to the *Oracle Trade Management Implementation Guide* for additional information on categories.
- **Owner:** By default, the owner is the user creating the budget. A different owner can be specified.
- **Create button:** When you click Create, the Budget Detail page appears. From that page, you can specify accounting information, including an accrual liability account and a sales/expense/charge account. Refer to the *Oracle Trade Management Implementation Guide* for additional information.

Identifying Special Pricing Budgets

After the special pricing budget or budgets have been set up, the OZF: Default budget for special pricing profile option must be set to identify the budgets appropriately.

If an organization is going to use a single special pricing budget, the profile option is set at the Site level. The value is the name of the budget.

If an organization is implementing multiple budgets for special pricing, the profile option must be set for each budget at the Responsibility level, where the responsibility corresponds to a business unit or geographic entity. The value is the name of the budget.

Offers

When a special pricing request is approved, an offer is created in Trade Management. The type of offer created is determined by the type of special pricing request:

- **ScanData Offer:** This offer is generated when a partner requests special pricing for products that already exist in the partner's inventory. The offer enables vendors to reimburse partners for the discounted amount on products that partners have already bought. The partner will need to submit a claim to be reimbursed for the product discount.
- **Off Invoice Offer:** This offer is generated when a partner requests special pricing for products that it plans to purchase and the vendor approver indicates that the partner will receive the discount at the time an order is placed. This offer acts as a pricing modifier for future orders. Vendors can see the Offer Type field during approval if the Ship from Stock check box is not selected. If the vendor approver specifies this type of offer, partners do not have to submit a claim. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to receive the discount. The authorization code is displayed on the approved special pricing request.
- **Accrual Offer:** This offer is generated when a partner requests special pricing for products that it plans to purchase and the vendor approver indicates that the partner will need to submit a claim to receive the discount. This offer acts as a pricing modifier for future orders. Vendors can see this field during approval if the Ship from Stock check box is not selected. If the vendor approver specifies type of offer, partners have to submit a claim to receive the approved discount. An authorization code is generated for the partner upon approval, which needs to be used when booking the order to receive the discount. The authorization code is displayed on the approved special pricing request.

The three offers used with special pricing are seeded in Trade Management as custom setups. It is not recommended that additional offers be created for special pricing.

Tracking Financial Liability

Each budget has five kinds of the budgeted amount. They are Planned, Committed, Utilized, Earned, and Paid. The planned amount increases when a request is made on that budget. When the budget request is approved, the committed amount increases. If a Scan Data offer is generated, the utilized and earned amounts increase when the offer is approved. If an Accrual or Off-Invoice offer is generated, the utilized amount increases when an order is booked and the earned amount increases after the order is shipped. For Scan Data and Accrual offers, the paid amount increases after claims are closed. For Off-Invoice offer, the paid amount increases after an invoice is generated for that order. In this flow, liabilities are earnings that are tracked based on the offer types.

In the Existing Inventory scenario, accruals are created that can be paid upon completion of the sale.

In the New Inventory scenario:

- When a request is approved with Accrual offers, utilizations are created after orders are placed and become available for payments once they are shipped.
- When a request is approved with Off-invoice offers, liabilities are not tracked as the discount is taken directly off the invoice.

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

Claims

A claim is used for partner reimbursement in two special pricing scenarios:

- When a partner is requesting special pricing on existing inventory. When a request of this type is approved, a Scan Data offer is created and an agreement number is generated. The partner uses the code when submitting a claim.
- When a partner requests special pricing on new inventory and the vendor approver indicates that the partner will need to submit a claim to receive the discount. With an Accrual request, an Accrual offer is created and an agreement number and an authorization code are generated. The partner uses the authorization code when booking the order and the agreement number when submitting a claim.

When a Scan Data or an Accrual special pricing request is approved, a claim is automatically generated in Trade Management. A default claim (which is called Claims) is available in Trade Management as a custom setup.

The default claim specifies that a number of items will be included in the claim form, including team information, notes, and request history. An organization can also create customized claim, if required. Creating a custom claim provides the following benefits:

- Since all claims that use the default custom setup have the same prefix, identifying the type of partner request a claim is associated with could become difficult. Creating a customer claim allows you to set up a new prefix that can be used to easily identify special pricing claims.
- Allows you to set up a different approval routing process for different types of claims. The default claim does not implement a claims approval process.
- Allows you to set up a different claim validation process.

Refer to the *Oracle Trade Management Implementation Guide* for additional information.

Trade Profiles

Trade Profiles allow defaulting of payment methods, vendor and vendor site mapping for a partner and batch level, line level threshold limits for error margins of special pricing claims submitted through the Indirect Sales Management module. Trade profiles are setup from Oracle Trade Management User > Administration > Trade Management > Customer > Trade Profile.

For more information, see *Oracle Trade Management Implementation Guide*.

Setting up Special Pricing Product Security

A vendor might want to limit the products or product categories for which partners can request special pricing. By default, all products are enabled for special pricing. Limiting the products eligible for special pricing involves first enabling product security through the OZF_SP_ENABLE_PRODUCT_SECURITY profile option, and then specifying product categories for a partner from the partner's profile tab.

Setting the OZF_SP_ENABLE_PRODUCT SECURITY Profile Option

The OZF_SP_ENABLE_PRODUCT_SECURITY profile option is set at either the Site or the Responsibility level, where the responsibility corresponds to a business unit or geographic entity. An organization would set the profile at the Responsibility, for example, if it wanted to enable security for partners for one country but disable it for partners in different country.

If the value is set to No, partners can request special pricing for all products. If the value is set to Yes, partners can request special pricing for products specified in the Special Pricing Product Categories attribute only.

Specifying Product Categories for Special Pricing

The product categories that can be used for special pricing requests are specified individually for each partner from the Profile tab on Partner Details page. The categories that are listed come from the Product Catalog.

Creating the Special Pricing Responsibility

To make the Special Pricing link available in the Quick Links bin, a custom responsibility must be created and this responsibility can include the special pricing function in the menu structure.

Menus tied with the Partner Super User responsibility can be used as a reference to create menus for custom responsibilities. For defining menus that can be used with the Quick Links bin, see the *Oracle iStore Implementation Guide*.

Use this procedure to create a custom responsibility for accessing a special pricing request, with root menu and menu exclusions.

Navigation

Log into Oracle Forms as the system administrator and navigate to Security > Responsibility > Define.

Prerequisites

None.

Notes

- **Responsibility Name:** Partner Special Pricing
- **Application:** Partner Relationship Management
- **Responsibility Key:** PV_SPECIALPRICE
- **Description:** Responsibility for Special Pricing
- **Name:** Standard
- **Application:** Partner Relationship Management
- **Menu:** Root menu name
- **Submenu:** OZF_SPECIAL_PRICE_OTHER

Creating the Special Pricing Benefit

Special pricing is made available to partners as a benefit of partner program membership. A special pricing benefit is created by the channel administrator as a benefit of the type Other.

A channel manager can assign the Special Pricing benefit to a partner program. Subsequently, the channel administrator maps the program with the Special Pricing responsibility, which provides the partner users access to special pricing pages.

Setting up Approvals

Special pricing requests are subject to an approvals process. When a partner user submits a special pricing request, it is routed to an approver, who is a vendor user. The approver can approve or reject the request. The special pricing approvals process is set up and managed through the Oracle Approvals Management application.

The seeded transaction for special pricing approval is OZF Special Pricing Request. Numerous attributes have been defined for the transaction. A default special pricing approver can be identified using the OZF: Default Special Pricing Request Approver profile option. For more information on setting up approvals for special pricing, refer to *Creating Approval Rules in Oracle Approvals Manager*, page 3-2.

Setting Up Notifications

Notification messages are sent to vendor and partner users in response to a number of special pricing request status changes. Notification messages for special pricing are created and stored in the Oracle Workflow Builder application. An organization be able to implement the notifications that have been seeded for special pricing without modification. However, if you need to make changes to the seeded notifications, such as changing the message text, adding URLs to messages, or even creating additional notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database.

In Workflow Builder, the item type for special pricing notifications is OZFSPBEN. The following table lists the notifications seeded for special pricing, and lists the types of users that are eligible for each notification and the special pricing request status that is applicable for the notification.

Seeded Notifications for Special Pricing

Notification Name	User	SP Request Status
Request Created - Channel Manager Notification	Channel Manager	Draft
Request Submitted - Partner Notification	Partner Contact, Special Pricing Super User	Pending Approval
Request Submitted - Vendor Notification	Vendor Channel Manager, Vendor Approvers, Special Pricing Super User	Pending Approval
Request Approved - Partner Notification	Partner Contact, Special Pricing Super User	Approved
Request Returned - Partner Notification	Partner Contact, Special Pricing Super User	--
Request Cancelled - Partner Notification	Partner Contact, Special Pricing Super User	--
Request Declined - Partner Notification	Partner Contact, Special Pricing Super User	Declined

The following table lists special pricing statuses and the corresponding special pricing code.

Special Pricing Request Statuses

Status	Code
Draft	DRAFT
Pending Approval	SUBMITTED_FOR_APPROVAL
Approved	APPROVED
Declined	DECLINED
Closed	CLOSED

Selecting Notification Messages for Special Pricing Requests

The notification messages listed in the Seeded Notifications for Special Pricing are available for use with special pricing requests, but are not enabled by default. The channel administrator is responsible for selecting which of the seeded, as well as any additional custom notifications created by the vendor, will be used by the vendor.

Navigation

Log in as the channel administrator and select Special Pricing Notifications. Then, click Add Another Row.

Prerequisites

None

Notes

- Any combination of special pricing request status, user type, and notification message can be created. Use the Seeded Notifications for Special Pricing table as a guide to make sure that you have associated notifications, users, and special pricing statuses appropriately.

Setting up Data Quality Management (DQM)

DQM is a tool from the Oracle Trading Community Architecture (TCA) group that is used to check for potential duplicate customers or contacts for a given customer or contact.

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

If a duplicate record exists, the approver selects the existing end customer or partner record, and the system links the selected record with the special pricing request. If the system finds an exact match with one and only one party, then the system automatically links the selected record with the special pricing request. If a duplicate record does not exist, the approver creates a new end customer or partner record.

Users with the permission OZF_SPECIAL_PRICE_DQM and OZF_SPECIAL_PRICE_SUPERUSER can identify DQM approvers. Any user with this permission and with access to the special pricing function can look up requests that need party matching from the entire request list by filtering requests. In the Create View page, add the

Customer Data Merged column in the search query to filter data and view requests for which DQM is required to be run.

For more information on setting up matching with DQM, refer to Setting up Matching Rules with Oracle Data Quality Management, page 3-10.

Setting up Notes

Notes can be created for a special pricing request. By default, all note types that are not specifically associated with another business object are available for with special pricing notes. A vendor can create a note type for special pricing limit the note types choices that are available for a special pricing request.

For more information about setting up notes and note types, refer to Setting up Notes, page 3-13.

User Security

Two permissions are associated with special pricing. The permissions can be assigned to an existing role, or a new permissions-based role can be created and assigned to selected special pricing users.

- **OZF_SPECIAL_PRICE_SUPERUSER:** Vendor users with this permission can view, update, approve and have DQM access to all requests. Partner users with this permission can view and update all requests made by their organization.
- **OZF_SPECIAL_PRICE_DQM:** Vendor users with this permission can match a party record to a master TCA record or create a new party record. Anyone with this permission can see the DQM flag in the Personalize screen and select records where DQM has not been run and then select an existing or create a new record.

OAM Transaction Types and Attributes

The transaction type for special pricing is seeded and the value is OZF: Special Pricing Request.

The following mandatory attributes are seeded.

- **ALLOW_DELETING_RULE_GENERATED_APPROVERS**
- **ALLOW_REQUESTOR_APPROVAL**
- **AT_LEAST_ONE_RULE_MUST_APPLY**
- **EVALUATE_PRIORITIES_PER_LINE_ITEM**

Special Pricing Management has header and line level attributes.

The following table describes the header attributes.

Header Attributes

Attribute	Description	Requiring Approval Types
ALLOW_EMPTY_APPROVAL_GROUPS	Whether to allow approval groups not to have members.	approval-group chain of authority, post-chain-of-authority approvals, pre-chain-of-authority approvals
CURRENCY_CODE	Currency Code	None
END_CUSTOMER_COUNTRY	End Customer Country	None
END_CUSTOMER_NAME	End Customer Name	None
IS_VAD	To find whether the partner is a distributor	None
MEMBERSHIP_TYPE	Partner Membership Type	None
PARTNER_COUNTRY	Partner Country	None
PARTNER_INDUSTRY	Partner Industry	None
PARTNER_LEVEL	Partner Level	None
PARTNER_NAME	Partner Name	None
PARTNER_TYPE	Partner type	None
REQUESTED_AMOUNT	Total Discount Amount	None
REQUEST_TYPE_CODE	Discount Type	None
SHIP_FROM_STOCK	Ship From Stock	None

The following table describes the line level attributes.

Line Level Attributes

Attribute	Description	Requiring Approval Types
DISCOUNT_AMOUNT	Requested Discount Amount	None
DISCOUNT_TYPE	Discount Type	None
PRODUCT	Product	None
REQUESTED_QUANTITY	Requested Quantity	None
REQUESTED_UOM	Requested UOM	None

Interactions

Interactions are logged whenever the status changes for a special pricing request.

The following table provides information on seeded interaction messages that would be logged for the corresponding status changes.

Interaction Messages

Message Name	Status Logged
OZF_SP_PENDING_LOG	Pending Approval
OZF_SP_REJECTED_LOG	Declined
OZF_SP_APPROVED_LOG	Approved
OZF_SP_CLOSED_LOG	Closed
OZF_SP_DRAFT_LOG	Draft

Profile Options

There are certain system profile options that must be set for special pricing to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for special pricing.

Lookups

There are some Lookups that can be modified for special pricing. Refer to Appendix B, "Lookups", page B-1 for information about Lookups related to special pricing.

Concurrent Programs

There are several concurrent programs that need to be run periodically for special pricing. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting Up Partner Funds Management

This chapter covers the following topics:

- Overview
- Setting up Partner Fund Budget Categories and Budgets
- Offers
- Claims
- Trade Profiles
- Creating a Budget Approval Process
- Setting Performance Objectives
- Setting up Return and Decline Options
- Geography
- Setting Up Partner Fund Benefits
- Setting up Approvals
- Setting Up Notifications
- Setting up Notes
- User Security
- OAM Transaction Types and Attributes
- Profile Options
- Lookups
- Concurrent Programs

Overview

Partner Funds Management enables partners to submit and check the status of fund requests and claims online. Partners can request funds for specific marketing activities that are intended to increase sales of the vendor's products.

When a partner submits a fund request, it gets routed to the appropriate approver(s). Approvers are notified of the request and they review, approve, decline, or return the request. The approver can return the request asking the partner to provide additional information. After the partner resubmits the request and the request is approved, it executes the marketing activity and, subsequently, submits a claim to

redeem money from the vendor. When the partner submits a claim, it is routed to the claim approver who then validates the claim. When the claim gets approved, the vendor pays the amount.

Partner and vendor users receive notifications about the fund request activity and can navigate directly from the notification into the associated fund request. Notifications are configured by the vendor and sent when the status changes, for example, when one of the fund requests is approved.

Partners can access a summary list of all the fund requests that they have access to in the system. They can build personal views to quickly find the fund requests that they are most interested in.

Setting up partner funds involves creating budgets, budget categories, activities, and media in Oracle Trade Management. Additional Oracle Trade Management set ups include creating a custom claim and budget approval rules. Other partner fund set ups include creating fund approval rules, notifications, and geographic criteria.

Tracking Financial Liability

Each budget has five kinds of budgeted amounts. They are Planned, Committed, Utilized, Earned and Paid. The planned amount increases when a request is made on that budget. When the budget request is approved, the committed amount increases. The utilized and earned amounts increase when the offer is approved. The paid amount increases after claims are closed. In this flow, liabilities are earnings that are tracked at the expense lines.

Setting up Partner Fund Budget Categories and Budgets

Partner funds are intended for marketing campaigns. The channel administrator must set up budgets and budget categories to fund marketing activities. Budgets and their related items are set up and managed in the Oracle Trade Management Application. When a budget is created for marketing purposes, activities and media items must be associated with the budget. An activity is a marketing activity, such as a mass mailing or an advertisement in a trade publication. A media item is a component of an activity; for example, a mass mailing activity might include media items such as postage, design, and printing.

Activities are associated with budget categories. When a partner funds budget is created, it is associated with a budget category, which automatically associates activities and their corresponding media items with the partner funds budget. Liability is then tracked at the media item level for the budget, and partners must report their expenses at the media item level when requesting compensation for marketing activities.

This section provides basic procedures for setting up media items, activities, budget categories, and budgets. For more information, refer to the *Oracle Trade Management Implementation* guide.

Creating a Marketing Media Item

Use this procedure to create marketing media items.

Navigation

Log on to Oracle Trade Management with the Oracle Trade Management User responsibility, and then navigate to Administration > Trade Management > Marketing Medium > Create. The Marketing Medium page appears.

Prerequisites

None

Notes

- **Activity:** Select an activity with which to associate the marketing medium. If a media item is associated with an activity, it is available for that activity only. Otherwise, a media item can be associated with any activity.
- **Preferred Vendor:** Allows the vendor to identify an organization that it prefers to use to create a particular type of medium. Examples of preferred vendors include a preferred printer or a preferred design firm.

Creating a Marketing Activity

Use this procedure to create a marketing activity.

Navigation

Log on to Oracle Trade Management with the Oracle Trade Management User responsibility, and then navigate to Administration > Trade Management > Activity > Create and then click Create. The Create Activity page appears.

Prerequisites

None

Notes

- **Active:** Select to enable the activity for use with a budget category.
- **Marketing Media:** Select the marketing media to be associated with the activity.

Creating a Budget Category

Use this procedure to create a budget category.

Navigation

Log on to Oracle Trade Management with the Oracle Trade Management User responsibility, and then navigate to Administration > Trade Management > Category > Create and then click Create. The Create Category page appears.

Prerequisites

None.

Notes:

- **Created for:** Select Budget. The Activity list appears.
- **Enabled:** Select to make the budget category active.
- **Sales/Expense/Charge Account:** Use the lookup to select an Oracle General Ledger account for tracking purposes.
- **Accrual Liability Account:** Use the lookup to select Oracle General Ledger account for liability tracking.
- **Activity:** Use the search to add an activity to the budget category.

Creating a Budget

Budgets for partner funds can be either fixed or accrual budgets:

- **Fixed Budget:** A fixed budget contains a specific amount of funds. A fixed budget allows the vendor to track the amount of funds that have been committed, used, earned, and paid for the budget. Companies generally use fixed budgets for Marketing Development Funds (MDF) budgets. Companies generally create MDF budgets in which they plan to spend a certain amount of channel marketing dollars in a particular time frame (for example, a quarter or a year).
- **Accrual Budget:** An accrual budget starts with zero funds. The budget is then built up based on actual partner sales. For example, \$100 is added to the budget each time a partner sells 10 units of a specified product. Companies generally use accrual budgets for co-op budgets, Co-op budgets are used to offer partners a percentage of their sales revenue via channel marketing funds.

There are two types of accrued budgets:

- **Accrue funds for customers:** Money is accrued by a partner over a period of time. The partner can later request some or all of the funds by submitting a claim or short paying an invoice.
- **Accrue funds for sales:** Money is accrued by partner over time. A sales representative can request some or all of the funds to support marketing activities or to reward a partner.

Setting up a Fixed Budget

Use this procedure to set up a fixed budget for partner funds.

Navigation

Log on to the Trade Management application with the Oracle Trade Management User responsibility, and navigate to Budget > Create, and then click Create to display the Create Budget page.

Prerequisites

A budget category for partner or marketing funds should be available. Activities and marketing media should be associated with the category.

Notes

- **Setup Type:** Select Fixed Budget.
- **Category:** Select the appropriate category for the partner funds budget.
- **Owner:** By default, the owner is the user creating the budget. A different owner can be specified.

Refer to the *Oracle Trade Management Implementation* guide for information on other fields, if necessary.

Setting up an Accrual Budget

Use this procedure to set up an accrual budget for partner funds.

Navigation

Log on to the Trade Management application with the Oracle Trade Management User responsibility, and navigate to Budget > Create, and then click Create to display the Create Budget page.

Prerequisites

A budget category for partner or marketing funds should be available. Activities and marketing media should be associated with the category.

Notes

- **Setup Type:** Accrual Budget.
- **Category:** Select the appropriate category for the partner funds budget.
- **Budget Amount:** For an accrual budget, the amount should be zero.
- **Holdback Amount:** For an accrual budget, the amount should be zero.
- **Owner:** By default, the owner is the person creating the budget. Use the search to specify a different owner.
- **Accrue To:** Select Customer or Sales
- **Accrual Basis:** Select Accrual Per Order or Cumulative Order Volume.
- **Discount Level:** Select Line
- **Liability Flag:** Deselect if the budget is an Accrue to Customer.

When you click Create, the Budget Detail page appears. From this page, you can specify accounting information (from the General Ledger application), including an accrual liability account and a sales/expense/charge account.

Click Request Approval to begin the budget approval process.

Offers

When a partner fund request is approved, an offer is created in Trade Management. Partner funds uses the seeded custom setup Soft Fund - Lumpsum offer for partner funds. When a partner's fund request is approved, a lump sum offer based on this custom setup is created automatically. The offer is used to track funds committed for the fund request.

By default, the Budget Approval process has been disabled for the Soft Fund - Lumpsum offer. Depending on business requirements, budget approval can be enabled for the offer, and then the vendor can set up an approval process for soft fund budgets.

It is not recommended that you create additional offers for partner funds.

Claims

A default claim (which is called Claims) is available in Trade Management as a custom setup. This default claim is used for all flows that require a party (for example, a partner) submit a claim to be reimbursed for an marketing activity or other situation.

When a partner fund request is approved, a Soft Fund - Lumpsum offer is created. The offer creates an authorization code. When a partner user submits a claim for reimbursement for marketing activities, she must include the authorization code on the claim to link the claim with the offer and the approved funding request.

The default claim specifies that a number of items will be included in the claim form, including team information, notes, and request history. An organization can also create customized claim, if required. Creating a custom claim provides the following benefits:

- Since all claims that use the default custom setup have the same prefix, identifying the type of partner request a claim is associated with could become difficult. Creating a customer claim allows you to set up a new prefix that can be used to easily identify partner fund claims.
- Allows you to set up a different approval routing process for different types of claims. The default claim does not implement a claims approval process.
- Set up a different claim validation process.

Refer to the *Oracle Trade Management Implementation Guide* for additional information on creating custom claims.

Trade Profiles

Trade Profiles allow defaulting of payment methods, vendor and vendor site mapping for a partner. Trade profiles are setup from Oracle Trade Management User > Administration > Trade Management > Customer > Trade Profile.

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

Creating a Budget Approval Process

Depending on an organization's business requirements, a separate approval process can be created for the allocation of budget funds associated with a partner fund request. The budget approval process is set up in Oracle Trade Management, and is initiated when a Soft Fund - Lumpsum offer is created upon the approval of a partner fund request. Note that the budget approval process is a separate process from the partner fund request approval process, which is set up and administrated from the Oracle Approvals Manager application.

In the background, the concurrent program AMS Marketing Generic Approval runs to manage the approval workflow set up in this procedure.

Navigation

Log in to Oracle Trade Management with the Oracle Trade Management User responsibility, and navigate to Administration > Trade Management > Approval Rule, and then click Create to display the Approval Rule Details page.

Prerequisites

Before creating a budget approval process, make sure that:

- Budget Approval is enabled for the Soft Fund - Lumpsum custom setup.
- The appropriate budget approver Role Types and Roles have been created as part of the Oracle Trade Management implementation process.

Notes

- **Approval Rule For:** Select Budget Request.
- **Budget Category:** Optionally, a budget approval process can be associated with a budget category.
- **Minimum Amount:** Depending on business requirements, budget approval might be required for requests that are over a certain amount. Either enter a minimum amount here, or enter zero if all budget requests must be approved.

- **Approvers:** The approvers list appears after the Create button is clicked. Add one or more approvers to the list. We recommend that you select approvers of type User.

Setting Performance Objectives

A performance objective is the expected outcome for a marketing activity. Performance objectives appear on a fund request and its related claim(s). When a partner user submits a fund request, he is required to indicate the performance that is expected as a result of the marketing activities for which he is requesting fundin., Then, when the user submits a claim for the funding, he must indicate the actual performance for the marketing activity.

Performance objectives appear in a drop-down list, which is populated from a Lookup. The performance objectives Leads and Revenues are seeded; the channel administrator can add additional objectives as well.

Performance objectives are set up from the Oracle Trade Management Administration application. The lookup that is used for performance objectives is OZF_PARTNER_PERFORMANCE.

Setting up Return and Decline Options

When a fund request approver either returns a request to a partner or declines a request outright, he must provide a reason. Return and decline reasons appear in drop-down lists that are populated by Lookups. Return and decline reasons are set up from the Oracle Trade Management Administration application.

The Lookup OZF_SF_DECLINE_CODE provides decline reasons. The following values are seeded for the Lookup:

- **COLLATERAL:** The collateral submitted with the request did not meet the vendor's criteria.
- **DUPLICATE:** The request is a duplicate.
- **INVALID:** The request is invalid.

The Lookup OZF_SF_RETURN_CODE provides return reasons. The following values are seeded for the Lookup:

- **COLLATERAL:** The collateral submitted with the request did not meet the vendor's criteria.
- **OTHER:** The request was returned for another reason.
- **MISS_INFO:** The request is missing information.

Geography

For partner funds, geography provides informational data. Geography is set up in Oracle Marketing by a user with the administrator responsibility. Up to eight geographic levels can be specified.

Geography may already be set up for your implementation, since geography is used in Partner Programs as well as in Oracle Marketing. However, if you need to set up geographic information, refer to the *Oracle Marketing Implementation and Administration Guide* for further details.

Setting Up Partner Fund Benefits

The ability to request funding for marketing activities is made available to partners as a benefit of partner program membership. A partner funds benefit is created by the channel administrator as a benefit of the type Soft Funds.

A channel manager can assign the partner funds benefit to a partner program. Subsequently, the channel administrator maps the program with a partner responsibility, which provides the partner users access to fund request and management pages.

Use this procedure to set up a partner fund benefit.

Navigation

Log in as the channel administrator and navigate to Programs > Benefits.

Prerequisites

A budget must be set up for partner funds.

Steps:

1. Select Soft Fund from the Create Benefits drop-down list and click **Go**.
The Create Benefit: Soft Fund page appears.
2. In the Budget region, select the budget that will be used to fund partner requests. More than one budget can be used to fund the benefit.
3. In the Notifications region, select the notification messages to be used for this benefit.

Setting up Approvals

Partner fund requests are subject to an approvals process. When a partner user submits a funding request, it is routed to an approver, who is a vendor user. The approver can approve or reject the request. The partner fund approvals process is set up and managed through the Oracle Approvals Management application.

The seeded transaction for partner fund approvals is OZF Soft Fund Request. Numerous attributes have been defined for the transaction. A default fund request approver can be identified using the OZF: Default Soft Fund Request Approver profile option. For more information on setting up approvals for partner funds, refer to Creating Approval Rules in Oracle Approvals Manager, page 3-2.

Setting Up Notifications

Notification messages are sent to vendor and partner users in response to a number of partner fund request status changes. Notification messages for partner fund request are created and stored in the Oracle Workflow Builder application. An organization might be able to implement the notifications that have been seeded for partner funds without modification. However, if you need to make changes to the seeded notifications, such as changing the message text, adding URLs to messages, or even creating additional notifications, you will need access to Oracle Workflow Builder version 2.6.2 and the Oracle 9i database.

In Workflow Builder, the item type for partner fund notifications is OZFSFBEN. The following table lists the notifications seeded for partner funds and lists the types of users that are eligible for each notification and the partner fund request status that is applicable for the notification.

Notifications for Partner Funds

Notification Name	User	Partner Fund Request Status
Request Created – Channel Manager Notification	Channel Manager	Draft
Request Submitted – Partner Notification	Partner Contact, Soft Fund Super User	Pending Approval
Request Submitted – Vendor Notification	Vendor Channel Manager, Vendor Approvers, Soft Fund Super User	Pending Approval
Request Approved – Partner Notification	Partner Contact, Soft Fund Super User	Approved
Request Returned – Partner Notification	Partner Contact, Soft Fund Super User	Returned
Request Cancelled – Partner Notification	Partner Contact, Soft Fund Super User	Void
Request Declined – Partner Notification	Partner Contact, Soft Fund Super User	Declined

The following table lists fund request statuses and the corresponding fund request code.

Fund Request Statuses

Status	Code
Draft	DRAFT
Pending Approval	SUBMITTED_FOR_APPROVAL
Returned	RETURNED
Approved	APPROVED
Declined	DECLINED
Closed	CLOSED
Void	VOID

Setting up Notes

Notes can be created for a partner fund request. By default, all note types that are not specifically associated with another business object are available for partner fund notes. A vendor can create a note type for partner fund requests limit the note types choices that are available for a request.

For more information about setting up notes and note types, refer to *Setting up Notes*, page 3-13.

User Security

The `OZF_SOFT_FUND_SUPERUSER` permission provides vendor and partner users with super user privileges for partner fund requests. Vendor users with this permission can view, update and approve all requests. Partner users with this permission can view and update all requests made by their organization.

OAM Transaction Types and Attributes

The transaction type for fund requests is seeded and the value is `OZF: Soft Fund Request`.

The following mandatory attributes are seeded.

- `ALLOW_DELETING_RULE_GENERATED_APPROVERS`
- `ALLOW_REQUESTOR_APPROVAL`
- `AT_LEAST_ONE_RULE_MUST_APPLY`
- `EVALUATE_PRIORITIES_PER_LINE_ITEM`
- `USE_RESTRICTIVE_LINE_ITEM_EVALUATION`

Partner Funds Management has header and line level attributes.

The following table describes the header attributes.

Header Attributes

Attribute	Description	Requiring Approval Types
ALLOW_EMPTY_APPROVAL_GROUPS	Whether to allow approval groups not to have members.	approval-group chain of authority, post-chain-of-authority approvals, pre-chain-of-authority approvals
CURRENCY_CODE	Currency Code	None
IS_VAD	To find whether the partner is a distributor	None
MEMBERSHIP_TYPE	Partner Membership Type	None
PARTNER_AMOUNT	Partner Amount	None
PARTNER_COUNTRY	Partner Country	None
PARTNER_INDUSTRY	Partner Industry	None
PARTNER_LEVEL	Partner Level	None
PARTNER_NAME	Partner Name	None
PARTNER_TYPE	Partner Type	None
REQUESTED_AMOUNT	Requested Amount	None
SOFT_FUND_BENEFIT	Soft Fund Benefit	None
TOTAL_AMOUNT	Total Amount	None
ACTIVITY	Activity	None

The following table describes the line level attributes.

Line Level Attributes

Attribute	Description	Requiring Approval Types
PRODUCT	Product	None
GEOGRAPHY	Geography	None
PERFORMANCE OBJECTIVES	Performance Objectives	None

Interactions

Interactions are logged whenever status changes for a fund request.

The following table provides information on seeded interaction messages that would be logged on the corresponding status changes.

Interaction Messages

Message Name	Status Logged
OZF_SF_PENDING_LOG	Pending Approval
OZF_SF_REJECTED_LOG	Declined
OZF_SF_APPROVED_LOG	Approved
OZF_SF_RETURNED_LOG	Returned
OZF_SF_CLOSED_LOG	Closed
OZF_SF_DRAFT_LOG	Draft

Profile Options

There are certain system profile options that must be set for partner fund requests to function properly. In addition to the profile options mentioned in this chapter, there are additional profile options that may need to be set. Refer to Appendix A, "System Profile Options", page A-1 for a complete list of profile options for partner funds.

Lookups

There are some Lookups that can be modified for partner funds. Refer to Appendix B, "Lookups", page B-1 for information about Lookups related to partner funds.

Concurrent Programs

There are several concurrent programs that need to be run periodically for partner funds. Refer to Appendix C, "Summary of Concurrent Programs", page C-1 for information about setting up and running the programs.

Setting up the Partner Locator

This chapter covers the following topics:

- Overview
- Defining a Hyperlink for the Locator
- Enabling Partner Profile Attributes for Advanced Search
- Setting Profile Options
- Running Concurrent Programs

Overview

The Partner Locator allows a potential customer to search for partners, resellers, and value-added resellers (VADs) that are registered with your organization through Oracle Partner Management. Partner Locator integrates with your organization's Web portal, so you can make it available to your partners' potential customers independent of the Partner Dashboard or Oracle Partner Management.

Partner Locator identifies partners that are located a certain distance from a customer's starting address. The search distance is determined by the vendor, and is set through two profile options:

- **PV: Locator Distance:** Specifies the distance within which the Partner Locator will search for partners
- **PV: Locator Default Distance Unit:** Specifies the unit of measure (for example, miles or kilometers) used for the distance specified in the PV: Locator Distance option

For each partner match identified, the Partner Locator returns the partner's street, web address, and phone number. The Partner Locator also provides a map showing the partner's location and driving directions from the customer's starting address to the partner's address.

The Partner Locator performs an address confirmation check on the starting address entered by the customer. If the Partner Locator is unable to find an exact match, the customer is asked to select an address from a list of potential addresses or locations.

The Partner Locator also provides an advanced search tool to further help potential customers find the right partner. Refer to "Enabling Partner Profile Attributes for Advanced Search" for additional information.

Defining a Hyperlink for the Locator

To make the Partner Locator available through a portal, a hyperlink needs to be added to the portal. The hyperlink should point to the machine where Oracle Partner Management is installed and the URL should look similar to the following:

```
http://<server_address><: server_port if any>/OA_HTML/pvxLoctrSearch.jsp
```

Enabling Partner Profile Attributes for Advanced Search

The Partner Locator provides potential customers with an advanced search tool that they can use to locate partners that meet certain criteria. The criteria that are available for the advanced search map to partner profile attributes. An attribute is available for use in the Partner Locator advanced search if it is active and if it has been enabled for the Locator.

For more information on partner profile attributes, refer to Setting up Partner Profile Attributes, page A-1.

Setting Profile Options

There are certain system profile options that must be set for the Partner Locator. For the profile options for Partner Locator, refer to Appendix A, "System Profile Options", page A-1.

Running Concurrent Programs

Certain concurrent programs must be run to set up and maintain the Partner Locator. For a list of the concurrent programs for the Partner Locator, refer to Appendix C, "Summary of Concurrent Programs", page C-1.

Oracle Sales Integration

This chapter covers the following topics:

- Overview
- Enabling Business Events
- Modifying the Assignment Routing Stage Lookup
- Modifying the Assignment Type Lookup
- Modifying Menus
- Migrating External Sales Team Data
- Personalizing Oracle Sales Pages

Overview

Oracle Partner Management can be integrated with Oracle Sales to improve an organization's ability to manage indirect sales opportunities. The procedures described in this chapter must be performed by an organization when integrating Oracle Partner Management with Oracle Sales. (Specifically, these procedures apply to integrations with Oracle Sales Patchset B. If you are integrating with Oracle Sales Online or Oracle Field Sales, these procedures are not required.)

Before performing the procedures in this chapter, it is recommended that you have reviewed the Read Me file or About document provided with the release, and have performed any software and patch installations described in those documents.

Enabling Business Events

Two Oracle Sales business events and their subscriptions need to be enabled: opportunity post-create and opportunity pre-update. To enable business events, log in to the Oracle Workflow application with the Workflow Administrator Web Applications responsibility and navigate to Workflow > Find Events/Event Groups.

Notes:

- Enable the event `oracle.apps.asn.opportunity.postcreate` (the opportunity post-create event). Then, enable the event subscription `oracle.apps.pv.oa.opportunity.util.server.PVCreatOppSub`.
- Enable the event `oracle.apps.asn.opportunity.preupdate` (the opportunity pre-update event). Then, enable the event subscription `oracle.apps.pv.oa.opportunity.util.server.PvUpdateOppSub`.

Modifying the Assignment Routing Stage Lookup

Modifications need to be made to two of the codes in the Assignment Routing Stage Lookup (Lookup type PV_ROUTING_STAGE). To modify the Lookup, log on to Oracle Forms with the Application Developer responsibility, and navigate to Application > Lookups > Common.

Notes

- Make the following changes to the PV_ROUTING_STAGE Lookup:
 - Change the Meaning field for the lookup code ACTIVE from Active to Completed.
 - Change the Meaning field for the lookup code MATCHED from Matched to Pending Approval.

Modifying the Assignment Type Lookup

Modifications need to be made to codes in the Assignment Type Lookup (Lookup type PV_ASSIGNMENT_TYPE). To modify the Lookup, log on to Oracle Forms with the Application Developer responsibility, and navigate to Application > Lookups > Common.

Notes

- Make the following changes to the PV_ASSIGNMENT_TYPE Lookup:
 - Change the Meaning and the Description fields for the lookup code BROADCAST from Multiple - Parallel to First Come First Serve.
 - Change the Meaning and the Description fields for the lookup code SERIAL from Multiple - Serial to Single - Serial.

Modifying Menus

Modifications need to be made to menus in both Oracle Partner Management and Oracle Sales. In addition, a submenu needs to be removed from the Channel Manager responsibility. To modify menus, log on to Oracle Forms with the System Administrator responsibility, and navigate to Application > Menu.

Steps:

1. Add Oracle Sales submenus to Oracle Partner Management menus:
 1. Add ASN_OTHER_MENU as a submenu to PV_OPPORTUNITY_OTHER
 2. Add ASN_OTHER_MENU as a submenu to PV_PARTNER_OPPORTUNITY_OTHER
2. Add PV_ASN_MENU_OTHER as a submenu of ASN_OTHER_MENU.
3. Remove the Opportunity prompt from the PV_OPPORTUNITIES function under the PV_OPPORTUNITIES menu.
4. Remove the ASF_OPPORTUNITY_REPORTS submenu from the PV_OPPORTUNITIES menu.
5. Remove the row containing the Opportunity Reports prompt from the PV_PARTNER_SUPER_USR_OPPTY menu.

6. Navigate to Security > Responsibility > Define, and display the Channel Manager responsibility.
7. Exclude the ASF_TRANS_FORWD function from the Channel Manager responsibility.
8. Navigate to Security > Responsibility > Define, and display the Partner Super User responsibility.
9. Exclude the ASF_TRANS_FORWD function from the Partner Super User responsibility.

Migrating External Sales Team Data

Earlier implementations of Oracle Partner Management allowed a partner contact to exist on an opportunity, a lead, and a customer sales team after the partner organization was removed from the opportunity, lead, or sales team. As of Patchset B, a partner contact is accessed through the partner organization, and thus a contact can not be accessed if the partner organization has been removed.

The concurrent program PV - External Sales Team migration should be run to make sure that partner organizations are reassociated with opportunities, leads, and customer sales teams if the partner contacts are still associated with the objects after the partner organization has been removed. The concurrent program should be run during the upgrade process (that is, during an upgrade that implements Patchset B) and as part of the Oracle Sales and Oracle Partner Management integration process, and then periodically afterwards. For more information about the concurrent program, refer to "Appendix C, Summary of Concurrent Programs", page C-1.

Personalizing Oracle Sales Pages

Some personalizations need to be made to Oracle Sales opportunity pages to enable integration with Oracle Partner Management. The personalizations primarily involve enabling features that are used by an indirect sales organization, for example adding a Partners subtab to the Update Opportunity page and adding a Partners region to the Sales Team.

All the personalizations listed in this section are performed at the Responsibility level. Depending on business requirements, an organization might choose to enable partner-specific items for Oracle Partner Management-related responsibilities only. Other organizations might choose to enable the items for Oracle Sales users as well. The personalizations for vendor users of Oracle Partner Management and Oracle Sales are the same. Some different personalizations are required for partner users.

Personalizations for Vendor User Responsibilities

Perform these personalizations for vendor users, that is, users who are employees of the implementing organization. The seeded responsibilities for vendor users are:

- Sales User
- Sales Manager
- Channel Manager

Notes

- Enable the Partners tab on the Update Opportunity page.

- Enable the Referral Code field on the Update Opportunity page.
- Enable the Partners region on the Sales Team tab on the Update Lead page.
- Enable the Partners region on the Sales Team tab on the Update Customer page.
- Enable the Assignment Status column on the Opportunity Search results page.
- Enable the Assignment Status column on the Opportunities page.

Personalizations for Partner User Responsibilities - Opportunities Pages

The opportunity-related pages that partner users see are the same pages that are used by vendor users. There are some changes that must be made to these pages to make them appropriate for use by partner users. The changes are made through use of the Oracle Applications Personalization feature.

Perform these personalizations for partner users, that is, users who are employees of the implementing organization's partners. The seeded responsibilities for partner users are:

- Default Partner User
- Partner Super User

The personalizations will need to be performed for each additional partner responsibility implemented.

Notes

- Enable the Abandon button on the Update Opportunity page.
- Make the Vendor Sales Team information read-only:
 - Make the items in the Sales Team table read-only.
 - Disable the Add Person button.
 - Disable the Select radio button.
 - Disable the Remove icon.
- Hide the Oracle Sales Notes and Tasks region and expose the Oracle Partner Management Notes region.
- Change the name of the Notes & Tasks midtab to Notes.
- Enable the Referral Code field on the Update Opportunity page.

Personalizations for Partner User Responsibilities - End Customer pages

A vendor organization can choose to give its partners access to end-customer information. When a vendor makes end-customer information available to its partners, there are some flows and other items that must be disabled because they are not currently supported by Oracle Partner Management, and these are listed in this section. This section also provides some additional personalizations that are recommended for successful implementation.

Perform these personalizations for partner users, that is, users who are employees of the implementing organization's partners. The seeded responsibilities for partner users are:

- Default Partner User
- Partner Super User

The personalizations need to be performed for each additional partner responsibility implemented.

Mandatory Customer Page Personalizations

It is mandatory that the following items be disabled because they can cause errors or conflicts with currently supported flows within Oracle Partner Management.

Notes:

- Disable the Create Lead button. Oracle Partner Management does not support partner creation of leads.
- Disable the Create Opportunity button. Oracle Partner Management does not support partner creation of opportunities.
- Disable the Update Customer Details button.

The Update Customer Details button provides users with access to additional functionality including editing customer profiles, business relationships, classifications, and sales teams. This is information that partners should not have access to

- Hide the Business Activities section. Business Activities are not supported for partner flows.
- Hide the Notes section. Notes are not supported for partner flows.
- Hide the Tasks section. Tasks are not supported for partner flows.

Recommended Customer Page Personalizations

A vendor organization needs to consider carefully the level of access to and the actions allowed for partner users in the Contacts, Addresses, Phone Numbers, and Attachments sections associated with customers. The information that partner users can see in these sections is not limited to the information created by or relevant to their partner organizations; instead, partner users can see all contacts, addresses, and phone numbers that are available for a customer, and can also see all attachments created by both vendors and other partners. For each of these sections, the vendor must determine whether or not to disable the Create, Update, and Remove or Delete buttons. The deploying company must also determine whether or not to disable Contact Name links.

System Profile Options

This appendix covers the following topics:

- Before You Begin
- Setting Profile Options
- Profile Options for the Channel Manager Dashboard
- Profile Options for Deal Registration
- Profile Options for Enrollments
- Profile Options for Partner Funds
- Profile Options for Opportunities
- Profile Options for the Partner Dashboard
- Profile Options for the Partner Locator
- Profile Options for Partner Profile Attributes
- Profile Options for Partner Programs
- Profile Options for Referral Management
- Profile Options for Special Pricing

Before You Begin

Before making Oracle Forms settings, ensure that all Oracle Applications server processes are up and running. In particular, if you stopped concurrent managers before applying Oracle Applications patchsets, restart them now by changing to `$COMMON_TOP/admin/scripts`, and executing `adcmctl.sh<APPS username?Apps password>start`.

Setting Profile Options

Use the following procedure to set a profile option.

Prerequisites

None.

Steps

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

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

Profile Options for the Channel Manager Dashboard

To implement the Channel Manager dashboard, set the profiles listed in the following table.

Profile Options for the Channel Manager Dashboard

Profile Name	Required	Level	Setting	Description
PV New Partners Time Window	Yes	Site Application Responsibility User	Numeric value. Seeded Value = 30	Used in the Key Metrics bin in the New Partners statistics. The bin shows the number of partners registered in the system in the last N days, where N is the seeded value.

Profile Name	Required	Level	Setting	Description
PV: Inactive Partners Time Window	Yes	Site Application Responsibility User	Numeric Value. Seeded Value = 90	Used in the Key Metrics bin in the Inactive Partners statistics. The bin displays the number of partners in the system that have not placed orders in the last N days, where N is the seeded value.
PV: Territory Assignment Online	Yes	Site Application Responsibility User	Yes/No Seeded Value = Yes	<p>If the value is Yes, the channel team assignment occurs automatically when a partner is created or updated.</p> <p>If the value is No, the channel team is assigned when the concurrent program PV: Channel Team Assignment for Partner in TOTAL/ INCREMENTAL Mode is run.</p> <p>Note: If you are importing a large number of partners from an external system, it is recommended that you set the option to No.</p>
PV: Batch size for territory assignment processing	Yes	Site Application Responsibility User	Numeric value Seeded Value = 1000	Calculates the number of child processes that are created when the PV: Channel Team Assignment for Partner concurrent program is run in TOTAL/ INCREMENTAL mode.

Profile Options for Deal Registration

To implement deal registration, set the profiles listed in the following table.

Profile Options for Deal Registration

Profile	Required	Level	Setting	Description
PV: Default Indirect Channel Type	Yes	Application Responsibility	Name of an indirect sales channel	This profile option specifies the indirect sales channel to which all opportunities generated from deal registrations will be assigned.
OS: Opportunity Access Privilege		Site Responsibility User	Full	<p>This profile drives the behavior of opportunity access. This profile is defined within the Sales Application but Oracle Partner Management uses it to drive access to deals.</p> <p>If this profile is set to Full, users can view all the deals that have been approved and converted into opportunities or linked to opportunities that the users can access.</p> <p>If this profile is set to another value, users can only view deal registrations linked to opportunities for which they are on the sales team.</p>

Profile	Required	Level	Setting	Description
PV: Default Deal Registration Approver		Site Application User	A user	<p>Specifies a user as the default deal registration request approver if the Oracle Approvals Management approval rule does not return an approver.</p> <p>Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.</p>
PV: Default DQM Approver		-	A user	<p>Specifies a user as the default Data Quality Management approver if Oracle Approvals Management does not return an approver.</p> <p>Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.</p>

Profile	Required	Level	Setting	Description
PV: Assign Approvers to lead or opportunity		Site Application Responsibility	Yes No	<p>When set to Yes, the deal registration approvers are automatically added to the sales team if the deal registration generates an opportunity or lead.</p> <p>When a lead is created, the owner of the lead is set to the first approver for the deal registration.</p> <p>If the PV: Assign Channel Manager to sales transactions profile option is also set to Yes, the owner of the lead is set to one of the channel managers for the deal.</p>
PV: Assign Channel Manager to sales transactions		Site Application Responsibility	Yes No	<p>When set to Yes, the channel manager assigned to the partner that submitted the request is added to the sales team if the deal registration generates an opportunity or lead.</p> <p>When a lead is created, the channel manager also becomes the owner of the lead. If multiple channel managers are assigned to the partner, the owner is selected randomly.</p>

Profile	Required	Level	Setting	Description
PV: DQM Contact Match Rules		Site Application Responsibility	DQM rule name	This profile stores the Data Quality Management rule that is used to perform contact matching for the customer.
PV: DQM Customer Match Rules		Site Application Responsibility	DQM rule name	Stores the Data Quality Management rule that is used to perform customer matching.
PV: Contact Relationship Codes		Site Application Responsibility	Contact Of	Used to determine the relationship of the contact with the customer.
PV: iStore Login URL		Site	<hostname>: <port>	Partner Login URL link sent with workflow notification for partner users.
PV: Self Service URL with Workflow Notification		Site	<hostname>: <port>	Vendor Self Service Applications URL sent with a workflow notification for vendor users.

Profile	Required	Level	Setting	Description
HZ: Generate Party Number		Site	Yes	If this profile is set to Yes, as part of the customer de-duplication process for deals, a new customer and its corresponding party number are created in the system if no match is identified.
		Application	No	
		Responsibility		
		User		
HZ: Generate Party Site Number		Site	Yes	If this profile is set to Yes, as part of the customer de-duplication process for deals, a new customer and its corresponding party site number are created in the system if no match is identified.
		Application	No	
		Responsibility		
		User		

Profile Options for Enrollments

To implement enrollments, set the profiles listed in the following table.

Profile Options for Enrollments

Option	Required	Level	Setting	Description
PV: Program Enrollment Request Reminder Notification Duration	Yes	Site Application	Default=15	If the enrollment request approver does not act upon an enrollment request in the number of days specified by this profile, the request is forwarded to the default approver.

Option	Required	Level	Setting	Description
PV: Default Enrollment Request Approver	Yes	Site Application	A user	<p>Specifies a user as the default enrollment request approver if the Oracle Approvals Management approval rule does not return an approver.</p> <p>Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.</p>
PV: Allow Approval Without Contract	Yes	Site	Yes No	<p>Determines whether or not a partner program enrollment request can be approved before a signed contract is received from the partner.</p> <p>Yes: Approval without signed contract is allowed.</p> <p>No: A signed contract must be received before a request can be approved.</p>

Option	Required	Level	Setting	Description
PV: Default Salesperson used for Orders	Yes	Site	CRM resource	Oracle Order Management requires that a sales person be identified for each order. This profile option allows you to specify a CRM resource as the sales person for each enrollment request order. A sales quota will be associated with the person specified; enter a fictional resource if a sales quota should not be associated with orders generated from partner program enrollments.
PV: Order Cancel Reason	Yes	Site	Reason codes form the Oracle Order Management CANCEL_CODE Lookup	Provides an order cancellation reason for a partner program enrollment request. This reason will be used when an enrollment request is cancelled because: <ul style="list-style-type: none"> • The partner chose to cancel the request • The maximum number of credit card authorization requests was exceeded • The approver rejected the enrollment request

Option	Required	Level	Setting	Description
PV: Order Transaction Type	Yes	Site	BILL ONLY	This profile is used by Oracle Order Management to specify the order for the partner program enrollment is a bill-only order (as a partner program is not a shippable item).
PV: Max number of credit card authorization	Optional	Site	Default = 3 Numeric value	Specifies the number of times that a credit card authorization can fail. If the number specified has been exceeded, the enrollment request ends, and the user is returned to the Partner Dashboard. The registration is saved, including the contract information. In addition, billing information is saved by Oracle Order Management.
OM: Payment method for Credit Card Transactions	Yes	Site Application Responsibility User	Merchant ID	This credit card transaction method is used to figure out merchant ID from Receivables, which is required when getting credit card authorizations from iPayment.

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

Option	Required	Level	Setting	Description
Sequential Numbering	Yes	Site Application Responsibility	Always Used	Specifies that orders created in Order Management are numbered sequentially.
MO: Operating Unit	Yes	Responsibility	Default operating unit	Specifies the operating unit against which users place orders. The user can view and purchase items that are in the Inventory Organization associated with this operating unit only. Set to the default operating unit at the customer responsibility level.

Profile Options for Partner Funds

To implement partner funds, set the profiles listed in the following table.

Profiles Options for Partner Funds

Profile Option	Required	Level	Setting	Description
OZF_SF_ GRACE_DAYS	Optional	Site Responsibility	Numeric value Default = 0	<p>Specifies a grace period for a partner fund. The system uses the number of days specified in this profile to determine for how long after the fund approval date a fund request remains active. Once the grace period has passed, the status of the fund request changes to Closed, and claim can no longer be submitted against the fund request.</p> <p>Note: By default, this profile is set to zero, which specifies up a grace period of one day. You must change this profile to provide for a realistic grace period.</p>

Profile Option	Required	Level	Setting	Description
OZF_SF_DEFAULT_BENEFIT	Optional	Site Responsibility	List of fund request benefits	Used to set up default benefit for fund requests. For deployments that do not use partner programs, this profile can be used to set up a partner fund benefit.
OZF_SF_DEFAULT_APPROVER	Optional	Site Responsibility	A user	Specifies a user as the default fund request approver if the Oracle Approvals Management approval rule does not return an approver. Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.

Profile Options for Opportunities

To implement opportunities, set the profiles listed in the following table.

Profile Options for Opportunities

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

Option	Required	Level	Setting	Description
PV: Enable Full Access on Opportunity to Partner	Optional	Site	Yes	<p>This profile is used to determine whether partner contacts are added to the opportunity sales team with full access or read-only access during opportunity routing.</p> <p>If set to Yes, the partner, after accepting the opportunity can update the opportunity details.</p> <p>If set to No, the partner user has read-only access to the opportunity. In addition, the partner can create notes and add attachments.</p>
PV: Filter Partner Search by Identifying Address	Optional	Site Application Responsibility	Yes No	<p>If the profile is set to Yes, the partner Simple Search, Advanced Search, and Generate Partner List return partner identifying addresses only, and the results pages display partner identifying addresses only.</p> <p>If the profile is set to No, all partner address are returned by the searches, and the pages display all partner addresses.</p>

Option	Required	Level	Setting	Description
PV: Active Notification Flag	Optional	User	Yes No	User can enable or disable notifications when the partners accepts an opportunity. If set to Yes, the partner contact receives a notification when the routing status changes from Offered to Active.
PV: Bypass CM Approval for Campaign Routing	Yes	Site	Yes No	Determine whether channel manager approval is required for partners matched by a campaign. This profile option is used along with PV: Enable Automatic Routing by Campaign. The default value is No.
PV: Common Currency for Rules Engines	Yes	Site	Any available currency	Base currency used for currency comparison in partner matching. If the currency specified for the rule is not the same as the base currency, it is converted to the base currency and then the comparison is performed. This profile is also used by the concurrent program PV Refresh Attribute Text Table. The default is USD.

Option	Required	Level	Setting	Description
PV: Default Batch Assignment User	Optional	Site	A User	This user is added to the sales team of an opportunity which failed to complete the full automated background Lead to Opportunity to Routing process.
PV: Default CM TimeOut	Optional	Site	Numeric value	Default channel manager timeout in hours if not specified at the country level. Sets the time period available to channel managers to review and approve partner matching and selection. If the channel manager does not respond in the given time, the default response is Match Approved.
PV: Default Partner TimeOut	Optional	Site	Numeric value	Default partner timeout in hours if not specified at the country level. Sets the time period available to Partner Contacts to accept the offered opportunity. If no response, the default response is Offer Declined.
PV: Default Routing Type	Yes	Site	Default = Single Multiple-Serial Multiple-Parallel Joint	Default assignment type used by the background partner routing. Partners default assignment type.

Option	Required	Level	Setting	Description
PV: Default Unassigned Opportunity TimeOut	Optional	Site	Numeric value	Sets the time period an unassigned opportunity may have the Unassigned routing status. At the expiration of the time period, a concurrent manager program, PV Unassigned Opportunity Process After Timeout, performs automatic matching and routing.
PV: Default Vendor User (Channel Manager)	Optional	Site Application Responsibility	-	Default channel manager used if none found for partner.
PV: Default for Bypass Channel Manager approval checkbox	Optional	-	-	Determines the display of the Bypass channel manager approval flag on the opportunity assignment page. Possible Values: Bypass CM - Allow update Bypass CM - No Update Allowed Do not Bypass CM - Allow Update Do not Bypass CM - No update Allowed

Option	Required	Level	Setting	Description
PV: Display Submit Routing Button	Optional	Site Application Responsibility User	Yes/No	<p>Enable and disable ability for user to submit or withdraw assignment routing.</p> <p>When set to Yes, a Submit Routing button is displayed on the opportunity assignment page. This profile is not available to partner users. The default is No.</p>
PV: Enable Automatic Routing by Campaign	Optional	Responsibility	Yes/No	<p>Enables automatic routing based on campaigns. When the campaign field is completed, the system adds associated partners to the sales team, opportunity routing list and starts the routing process. The default is No.</p>

Option	Required	Level	Setting	Description
PV: Enable Partial Matching of Attributes	Optional	All	No	Enables the partner matching engine to return partners even if an exact match is not found for manual matching. The algorithm used is: if no partners are returned for the search conditions specified, the lowest ranked condition is dropped and the engine performs the search again. This process continues until at least one partner is found or all the search conditions are exhausted.
PV: Enable Workflow to send e-mails	Yes	Site	Yes/No	Enable or disable notifications in indirect opportunity management.
PV: Enforce Address Filters in Partner LOV	Yes	Site	Yes/No	If set to Yes, the partner LOV allows to search based on partner name and address.
PV: Java Class to Restrict ORG Access Privilege	Optional	Site	Java Class Filename	Customizable Java Class is available to restrict partners from accessing customer details from the opportunity pages by clicking the customer link.

Option	Required	Level	Setting	Description
PV: Locator Default Distance Unit	Yes	Site Application Responsibility User	Distance Unit	Default distance unit for manual search. Also used for automatic matching if rule selected did not specify distance unit. This is also used by the reseller locator. The default value is Mile.
PV: Locator Proxy Port	Yes	Site	-	Proxy server port. The default value is 80.
PV: Locator Proxy Server	Yes	Site	-	Proxy server address. The default value is <i>www.proxy.us.oracle.com</i> .
PV: Locator Server Timeout	Yes	Site Application Responsibility User	Time in milliseconds	Timeout for the eLocation Request used in reseller locator. The default value is 20000 milliseconds.
PV: Matched Notification Flag	Optional	User	Yes No	User can enable or disable the notification when an opportunity is matched. If set to Yes, the user receives an e-mail notification when an opportunity is matched with a partner. The default is Yes.

Option	Required	Level	Setting	Description
PV: Matching Rule Selected by Engine	Yes	User	Yes/No	<p>If set to Yes, the matching rule is selected by the Rules Engine in automatic matching. If set to No, a user is able to select the rule to use for opportunity matching. The default value is No.</p> <p>See Profile PV: Rule for Automatic Matching.</p>
PV: Max Number of Matched Partners	Yes	Site	-	<p>Maximum number of partners returned during partner matching (manual and automatic). If the value is not specified, the number of partners returned is 10.</p>
PV: Offered Notification Flag	Optional	User	Yes/No	<p>If set to Yes, the user receives an e-mail notification when an opportunity routing status changes to Offered.</p>
PV: Require Opportunity Contact for Manual Routing	Optional	Resp	Yes/No	<p>Do not allow, or allow assignment routing if there are no opportunity contacts.</p> <p>When set to Yes, a contact name for the opportunity is required for manual and batch routing to start. If set to No, a contact name is not required. The default is No.</p>

Option	Required	Level	Setting	Description
PV: Restrict Sales Team Partner Contact LOV	Optional	Site	Yes No	For customer external sales team, if 'Yes', restrict the display of contacts to those partners that the sales team member can access.
PV: Rule for Automatic Matching	Yes	User	Yes No	If the profile, PV: Matching Rules Selected by Engine is set to No, this profile is used to determine which rule to use for automatic matching.
PV: Trace for Auto Matching	Optional	Site Application Responsibility User	Yes No	If set to Yes, automatic partner assignment process trace is displayed in the UI for debugging. The default value is No.
PV: Unassigned Notification Flag	Optional	User	Yes No	If set to Yes, user receives a notification for a new opportunity with routing status 'Unassigned'. The default is Yes.
PV: Withdrawn Notification Flag	Optional	User	Yes No	If set to Yes, the user receives an e-mail notification when an opportunity routing status changes from Offered to Withdrawn. The default is Yes.

Option	Required	Level	Setting	Description
Applications Server-Side Proxy Host and Domain	Optional	Site	-	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Spatial Provider URL	Yes	Site Application Responsibility User	A URL	A URL for Spatial Information on Location (Default at site level is <code>http://elocation.oracle.com/elocation/lbs</code>). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Web Server Proxy Host Name	Optional	Site Application Responsibility User	Web Server Proxy Name	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
HZ: Web Server Proxy Port	Optional	Site Application Responsibility User	Web Server Proxy Port	This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.
OS: Auto Convert Lead to Opportunity	Yes	Site	Yes/No	If Yes, the system converts indirect leads to opportunities and performs automated rule-based partner assignment.
OSO: Default Sales Group and Role	Yes	Site	User Defined	Default Sales Group and Role For more information, see the Oracle Sales Online Implementation Guide.

Option	Required	Level	Setting	Description
OS: Opportunity Access Privilege	Yes	Site	Sales Team	This profile drives the behavior of opportunity access. This profile is defined within the Sales Application. The profile should be set to Sales Team, to make sure that partners see only those opportunities for which they are on the sales team.
PV: Locator Server URL	Yes	Site	<i>http://elocation.oracle.com/servlets/lbs</i>	PV Locator URL used to get the eLocation service
PV: Skip eLocation for Partner Matching Service	Optional	Site Application Responsibility User	Yes No	If 'Yes', system skips eLocation server and perform geo-proximity analysis based on radial distances only. If value is not set, the system defaults to No.
PV: Unassigned Opportunity Timeout (Days)	Yes	Site	10	Number of days an indirect Opportunity has stayed unassigned. Used by concurrent program PV - Unassigned Opportunity process after timeout.
PV: Abandon Notification flag	Optional	User	Default = Yes No	User can enable or disable notification when opportunity is abandoned.

Option	Required	Level	Setting	Description
PV: Recycled notification flag	Yes	User	Default = Yes No	User can enable or disable notification when the opportunity is recycled.
PV: iStore Login URL	Yes	Site	<i>http:// Machine Name:Port No/OA_HTML/ ibeCAcdLogin. jsp?ref= ibeCZzdMinisit jsp?grp= PARTNER</i>	Defines a URL for an iStore. The URL is embedded in workflow notifications that are received by partner users.
PV: Self Service URL with Workflow Notifications	Yes	Site	<i>http:// Machine Name:Port No/OA_HTML/ ibeCAcdLogin. jsp?ref= ibeCZzdMinisit jsp?grp= PARTNER</i>	Defines the URL for self-service log in that is embedded in the program approval request notifications that are received by a vendor user.
ASN: Opportunity Access Privilege	Yes	Site Application Responsibility User	Full Sales Team	Determines which opportunities a user can access. If set to Sales Team, a user can only access opportunities where the user is on the sales team or at least one of the user's subordinates is on the sales team. Sales Team is the default. If set to Full, a user can access all opportunities.

Profile Options for the Partner Dashboard

To implement the Partner Dashboard, set the profiles listed in the following table.

Profile Options for the Partner Dashboard

Option	Required	Level	Settings	Description
PV: Default Vendor Organization	Yes	This can be set up at the application or site level if there is only one internal vendor organization that should be used to create partner of relationship. This should be set up for the default responsibility that is derived from partner geography when a new partner is registered.	-	Used during the self-service registration and Customer to Partner conversion to identify which internal organization should be used for creating partner-of relationship between partner and vendor internal organization.
FUNCTION_SECURITY_REGION	Yes	Responsibility	PV_PARTNER_FUNC_SEC_REGION	Needs to be set up for each partner user responsibility that will be assigned to users who will need to access Oracle Partner Management transactional pages.
PV: Filter Partner Search by Identifying Address			Yes No	If the profile is set to Yes, the partner Simple Search, Advanced Search, and Generate Partner List return partner identifying addresses only, and the results pages display partner identifying addresses only. If the profile is set to No, all partner address are returned by the searches, and the pages display all partner addresses.

Option	Required	Level	Settings	Description
IBE: Enable Shopping Cart Global Icon	Optional	Responsibility	Yes No	Enables or disables the Shopping Cart global icon. Set this option to No for partner site responsibility.
IBE: Enable Order Tracker Global con	Optional	Responsibility	No	Enables or disables the Order Tracker global icon for partner sites. This needs to be disabled for the partner dashboard at the responsibility level.
IBE: Enable Quick Search	Optional	Responsibility	No	Enables or disables the Quick Search for partner sites. This needs to be disabled for the partner dashboard at the responsibility level.
IBE: Use Web Placements	Yes	-	-	Needs to be set to View eMerchandising Postings in the marketing postings bin. The Marketing postings bin requires additional implementation steps to see the eMerchandising postings in the partner site. For more information, see <i>Oracle iStore Implementation Guide</i> .

Option	Required	Level	Settings	Description
IBE: Quick Links Menu	Yes	Responsibility	-	<p>This is a mandatory profile if the Quick Links bin needs to be displayed when logging in with a particular responsibility.</p> <p>Needs to be setup to the correct FND menu from which quick links are rendered. This needs to be setup at responsibility level for partner site responsibility.</p> <p>Partner Super User responsibility should have this profile option setup as Partner User Sub Menu.</p>
IBE_USE_ORDER_TRACKER	Optional	Site Application Responsibility User	-	<p>The order tracker icon is displayed by default in the global icons section of any site. The icon can be disabled using this profile.</p> <p>This profile has the site level value seeded as Yes.</p> <p>Customers can turn off this profile at the application level if Oracle Partner Management and Oracle iStore are not implemented together in one site.</p> <p>If Oracle iStore and Oracle Partner Management are both implemented, this profile should be set to No at the partner responsibility level.</p>

Profile Options for the Partner Locator

To implement the partner locator, set the profiles listed in the following table.

Profile Options for the Partner Locator

Profile Name	Required	Level	Setting	Description
PV: Locator Default Distance Unit	Yes	Site	Default = Mile	Default distance unit used to search for a partner.
PV: Locator Proxy Port	Yes	Site Application Responsibility User	number	Proxy Server port number
PV: Locator Proxy Server	Yes	Site Application Responsibility User	address	Proxy Server address
PV: Locator Server URL	Yes	Site Application Responsibility User	http://elocation.oracle.com/servlets/lbs	PV Locator URL used to get the eLocation service
PV: Locator Skip eLocation Server	Yes	Site Application Responsibility User	Default = No	If set to Yes, system will skip the eLocation server and perform geo-proximity analysis based on radial distances
PV: Locator Distance	Yes	Site Application Responsibility User	Default = 10	The Reseller Locator will search for partners within this distance.
PV: Locator Maximum No. Of Partners	Yes	Site Application Responsibility User	number	The maximum number of partners returned with the Partner Locator is searching for partners. If not specified, the default is 20.

Profile Name	Required	Level	Setting	Description
PV: Locator Partners Per Page	Yes	Site Application Responsibility User	number	Number of partners that can be displayed per page in the Partner Locator. If not specified, the default is 10.
Applications Server-Side Proxy Host and Domain	Yes	Site	host and domain	Used by the TCA concurrent program Spatial Information for Locations Batch Update.
HZ: Spatial Provider URL	Yes	Site Application Responsibility User	a URL	A URL for Spatial Information on Location (Default at site level is <code>http://elocation.oracle.com/elocation/lbs</code>). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update
HZ: Web Server Proxy Host Name	Yes	Site Application Responsibility User	a web server proxy name	Used by the TCA concurrent program Spatial Information for Locations Batch Update.
HZ: Web Server Proxy Port	Yes	Site Application Responsibility User	a web server proxy port	Used by the TCA concurrent program Spatial Information for Locations Batch Update.

Profile Options for Partner Profile Attributes

To implement partner profile attributes, set the profiles listed in the following table.

Profile Options for Partner Profile Attributes

Profile Name	Required	Level	Setting	Description
OS: Forecast Calendar	Optional	Site	-	This profile sets the accounting calendar that is used to determine the start and end dates for the company's fiscal year.
OS: Default Period Type for Currency Conversion	Optional	Site	-	Default Period Type for Currency Conversion
PV: Common Currency for Rules Engines	Optional	Site Application Responsibility User	-	Used by the concurrent program PV: Refresh Partner Trend Values and PV Refresh Attribute Text Table to convert and store all currency attributes in this currency. This enables currency comparison to be performed accurately.
PV: Partner Trend Last Refresh	-	-	-	Can not be updated. Used by Refresh Partner trend concurrent program to determine the last incremental refresh time.
PV: Refresh Search Attributes Last Update Date	-	-	-	Not updatable by the users. Used by Refresh Partner trend concurrent program to determine the last incremental refresh time.

Profile Name	Required	Level	Setting	Description
PV: Vad/Partner Full Access To Profile Screens		Site Application Responsibility User	Default = N	This profile determines whether a partner or distributor can update their company profile and their own profile information from the partner dashboard.
PV: Attribute Percentage Total		Site Application Responsibility User	Default = 100	Used by attributes with a display style of Percentage to determine the percentage that its values should add up to. For example, if 80 is specified, the values for the attribute must add up to 80 percent.

Profile Options for Partner Programs

To implement partner programs, set the profiles listed in the following table.

Profile Options for Partner Programs

Option	Required	Level	Setting	Description
PV: Default Program for New Partner	Optional	Site	Program name	When this profile option is set, every time a new partner is created in the system, the partner gets automatically enrolled into this program after registration.
AMS : Item Validation Master Organization	Yes	Site	A valid master inventory organization	Creates a partner program as an item in Oracle Inventory under the specified master organization.

Option	Required	Level	Setting	Description
PV:Self Service URL with Workflow Notification	Yes	Site	<i>http:// servername: port/OA_ HTML/US/ICX INDEX.htm</i>	Defines the URL for the self-service log that is embedded in the program approval request notifications that are received by a vendor user.
PV: Is External Responsibility	Optional	Responsibility	Yes No	When set to Yes for a responsibility, the responsibility can be mapped to a partner program. When a partner user joins the program, he is assigned the responsibility specified. When set to No, the responsibility is not available for partner users.
PV: iStore Login URL	Yes	Site	<i>http:// Machine Name:Port No/OA_HTML/ ibeCAcdLogin. jsp?ref= ibeCzsdMinisite jsp?grp= PARTNER</i>	Defines a URL for an iStore. The URL is embedded in workflow notifications that are received by partner users.
PV: Allow Approval without Contract	Yes	Site	Yes No	Specifies whether or not a partner program enrollment request can be approved before a signed contract is received from the partner Yes: An enrollment request can be approved without a signed contract No: A signed contract must be received before an enrollment can be approved.

Option	Required	Level	Setting	Description
IBC: Use Access Control	Optional	Site	Yes Null No	<p>Determines whether a security check is required when a vendor user accesses Oracle Content Manager to set up a Program Overview.</p> <p>No or Null: Disables the security check.</p> <p>Yes: Enables the security check. When Yes is specified, addition security set up is required within Oracle Content Manager.</p>
QP: Source System Code	Yes	Application	Default = Oracle Special Pricing Oracle Application Name	Specifies the Oracle application that will be the source of the price lists used by Partner Programs.
OKC: Contract Report	Yes	Application	OKC: Partners Contract: Partners Terms and Conditions	Specifies how the contract associated with a partner program will appear when the partner user previews it during the enrollment process.

Option	Required	Level	Setting	Description
Self Service Accessibility Feature	Yes	Site	Screen Reader Optimized NONE Standard Accessibility	<p>A rich text editor can be used to create a Program Overview. The editor offers the ability to add images and formatting to an Overview, which can cause accessibility challenges for some users. This profile option allows you to enable or disable the rich text editor, and to select an editor that provides greater accessibility for users.</p> <p>Three settings are available for the editor:</p> <p>NONE: Enables the rich text editor, and makes the accessibility-specific features unavailable</p> <p>Screen Reader Optimized: Content is optimized for reading on a computer screen</p> <p>Standard Accessibility: Accessibility compliant mode</p>

Option	Required	Level	Setting	Description
PV: Concatenated Inventory Flex Segments for Program	Yes	Site Application Responsibility	Free flow text	<p>This value is used to populate the key flexfield segment values while creating the program as an inventory item internally. The value should be in the format:</p> <p>Segment1. Segment2. Segment3. Segment4 etc. (Etc.is just to denote as many segments as implemented). Here Segment1, 2,3... should be the values of the key flexfield segments that are used for inventory item creation from program. The delimiter should be the one that inventory uses to define the segments. One of the segment values should have the code PV_PRGM_FLEX_CODE. This code is replaced with first five characters of program name concatenated with program_id while creating the inventory item. So, for example, the value could be US.SOFTWARE.EBUS.PV_PGRM_FLEX_CODE where US, SOFTWARE are key flexfield segment Values and '.' is delimiter.</p>
QP: Multi-Currency Usage	Yes	Application	Yes No	<p>Determines whether or not an application can use multiple-currency price lists.</p> <p>Make sure that other Oracle</p>

Profile Options for Referral Management

To implement referral management, set the profiles listed in the following table.

Profile Options for Referral Management

Option	Required	Level	Setting	Description
PV: Default Indirect Channel Type	Yes	Application Responsibility	Name of an indirect sales channel.	<p>This profile option specifies the indirect sales channel to which all opportunities that are generated for a specific partner from referral will be assigned.</p> <p>Opportunities that generated from referrals but are not created for a specific partner are assigned a sales channel using the OS: Default Sales Channel profile option.</p>

Option	Required	Level	Setting	Description
OS: Opportunity Access Privilege		Site Responsibility User	Full	<p>This profile drives the behavior of opportunity access. This profile is defined within the Sales Application but Oracle Partner Management uses it to drive access to referrals.</p> <p>If this profile is set to Full, users can view all the referrals that have been approved and converted into opportunities or linked to opportunities that the users can access.</p> <p>If this profile is set to another value, users can only view referrals linked to opportunities where they are on the sales team.</p>
OS: Sales Lead Access Privilege		Site Responsibility User	Full	<p>If this profile is set to Full, users can view all referrals that generated a lead.</p> <p>If this profile is set to another value, users's views are limited to referrals linked to leads where they are on the sales team.</p>

Option	Required	Level	Setting	Description
PV: Default Referral Approver		Site	A user	<p>Specifies a user as the default referral request approver if Oracle Approvals Management does not return an approver.</p> <p>Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.</p>
PV: Assign Approvers to lead or opportunity		Site Application Responsibility	Yes No	<p>When set to Yes, the referral approvers are automatically added to the sales team if the referral generates an opportunity or lead.</p> <p>When a lead is created, the owner of the lead is set to the first approver for the referral.</p> <p>If the PV: Assign Channel Manager to sales transactions profile option is also set to Yes, the owner of the lead is set to one of the channel managers for the referral. The owner is selected randomly.</p>

Option	Required	Level	Setting	Description
PV: Assign Channel Manager to sales transactions		Site Application Responsibility	Yes No	<p>When set to Yes, the channel manager assigned to the partner that submitted the referral is added to the sales team if the referral generates an opportunity or lead.</p> <p>When a lead is created, the channel manager also becomes the owner of the lead. If multiple channel managers are assigned to the partner, the owner is selected randomly.</p>
PV: Copy Lead Owner or Sales team members on approval notifications		Site Application Responsibility	-	<p>If this profile is set to 'Yes', notifications are sent to lead owners if a lead is generated from a referral, or to sales team members if an opportunity is generated from a referral.</p> <p>Note: The referral benefit must be configured to send notification to those user types.</p>
PV: DQM Contact Match Rules		Site Application Responsibility	DQM rule name	<p>This profile stores the Data Quality Management rule that is used to perform contact matching for the customer.</p>

Option	Required	Level	Setting	Description
PV: DQM Customer Match Rules		Site Application Responsibility	DQM rule name	This profile stores the Data Quality Management rule that is used to perform customer matching.
OZF: Validate market and product eligibility between object and budget		Site Responsibility	Yes No	Enables budget validation when a referral offer is created. This profile should be set at the responsibility level for the Channel Administrator responsibility and it should be set to Validate customer and products by each budget.
QP: Source System Code		Site Application User	-	This should be set at the application level for Oracle Partner Management. It should be set to the same value that the Oracle Marketing application is set to.
AMS: Allow Recalculation of Committed Budget		Site Application Responsibility User	Yes No	If this profile is set to Yes, when the budget exceeds the limit while making the accrual, the accrual is allowed to exceed the budget's committed amount, enabling the offer to ask for more fund later.

Option	Required	Level	Setting	Description
OZF: Allow committed budget to exceed total amount		-	Yes No	<p>If set to Yes, the referral benefit can be activated even though the requested budget amount exceeds the total budget amount.</p> <p>If set to No, the referral benefit will fail validation if the requested budget amount exceeds the total budget amount.</p>
PV: Contact Relationship Codes		Site Application Responsibility	Contact Of	When a new customer contact is created, this profile is used to determine the relationship of the contact with the customer.
PV: iStore Login URL		Site	<hostname>: <port>	Partner login URL link sent with workflow notification for the partner users.
PV: Self Service URL with Workflow Notification		Site	<hostname>: <port>	Vendor Self Service Applications URL sent with a workflow notification for vendor users.

Option	Required	Level	Setting	Description
PV: Default DQM Approver		Site Application Responsibility	A user	Specifies a user as the default Data Quality Management approver if Oracle Approvals Management does not return an approver. Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.
HZ: Generate Party Number		Site Application Responsibility User	Yes No	If set to Yes, as part of the customer deduplication process for referrals, a new customer and its corresponding party number are created in the system if no match is identified.
HZ: Generate Party Site Number		Site Application Responsibility User	Yes No	If set to Yes, as part of the customer deduplication process for referrals, a new customer and its corresponding party site number are created in the system if no match is identified.

Profile Options for Special Pricing

To implement special pricing, set the profiles listed in the following table.

Profiles Options

Profile Option	Required	Level	Setting	Description
OZF_SP_ENABLE_PROD_SECURITY	Optional	Site Responsibility	Yes/No	<p>Value in the profile controls if all products should be displayed or only products belonging to categories assigned to a partner in the Special Pricing Product Categories field in the partner's profile.</p> <p>The user selects at the product category level. The partner can see all products under that category and subcategories.</p>

Profile Option	Required	Level	Setting	Description
OZF_SP_GRACE_DAYS	Optional	Site Responsibility	Numeric value	<p>Specifies a grace period for a special pricing request. The system uses the number of days specified in this profile to determine how long (in days) after the request end date a special pricing request remains active. Once the grace period has passed, the status of the request changes to Closed, and claims can no longer be submitted against the request.</p> <p>Note: By default, this profile is set to zero, which specifies up a grace period of one day. You must change this profile to provide for a realistic grace period.</p>
OZF_SP_DEFAULT_APPROVER	Optional	Site Responsibility	A user	<p>Specifies a user as the default special pricing request approver if Oracle Approvals Management does not return an approver.</p> <p>Alternatively, an organization can use this profile option to specify an approver instead of setting up approval rules in Oracle Approvals Management.</p>

Profile Option	Required	Level	Setting	Description
OZF_SP_DEFAULT_BUDGET	Optional	Site Responsibility	One or more active, fixed budgets	<p>Depending on an organization's business needs, a single special pricing budget can fund all special pricing requests, or multiple special pricing budgets can be set up. This profile is used to determine whether or not multiple budgets will be used and identifies the budget(s).</p> <p>Multiple budgets: Each budget is specified at the Responsibility level, where the responsibility is a business unit or geographic entity. The name of a budget (set up in Oracle Trade Management) is specified for each responsibility.</p> <p>Single budget: Specify the name of the budget (set up in Oracle Trade Management) at the Site level.</p>
OZF_SP_PARTY_DQM_RULE	Optional	Site Responsibility	List of DQM rules for party match	Used to find the master party record for the reseller and end customer names, when submitting a special pricing request.

This appendix covers the following topics:

- Understanding Lookups
- Modifying Lookup Types
- Creating a New Lookup Type
- Adding Values to an Existing Lookup
- Lookups for the Channel Manager Dashboard
- Lookups for Deal Registration
- Lookups for Partner Funds
- Lookups for the Partner Dashboard
- Lookups for the Partner Profile Attributes
- Lookups for Partner Programs
- Lookups for Referral Management
- Lookups for Special Pricing

Understanding Lookups

Lookups supply the content for many of the lists of values (LOV) in the Oracle Partner Management user interface. Most lookups are predefined (seeded in the application). You can use the seeded values without modification, or you can customize them to fit your business needs. Lookup values are easy to use, and help ensure that users enter valid data into Oracle Partner Management.

There are three ways that you can customize lookup values:

- Add new values
- Set a value's Enable flag to No, so that it no longer appears in a LOV
- Use a value's start and end dates to control when it appears in a list

Modifying Lookup Types

You use the Application Utilities Lookups window to add a new lookup type, add values to an existing lookup type, or prevent existing values from appearing in a lookup type. You must log out and log in again to see the effect of your changes.

Lookups are identified as either User, Extensible, or System Lookups. A lookup's type determines the modifications that you can make to it:

- User: A user can both add and remove seeded items
- Extensible: A user can add items, but can not remove seeded items
- System: Users are unable to modify the content of the lookup

Creating a New Lookup Type

Use this procedure to define a new lookup type and lookup value.

Prerequisites

None

Steps

1. Log in to Oracle Forms with the System Administrator responsibility.
2. Navigate to Application > Lookups.
3. Choose the access level for the lookup type.
4. Enter the lookup type.
5. Enter the user name of the lookup.
This is the name that users will see from within the application.
6. Select the application in which the lookup will be used.
7. Optionally, add a description of the lookup type.
8. To add lookup values specific to the security group/business group linked to your current responsibility, uncheck the Global Security Group check box. Existing lookup values are available to all business groups.
9. Enter the code, meaning, and, optionally, a description for each value. Leave the Tag column blank.
10. Enter start and end dates
If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
11. Save your work.

Adding Values to an Existing Lookup

Use this procedure to add a new value to an existing Lookup.

Prerequisites

None

Steps

1. Query the lookup type to which you want to add a value.
You cannot add values if the access level is System.

2. To add lookup values specific to the security group/business group linked to your current responsibility, uncheck the Global Security Group check box. Existing lookup values are available to all business groups.
3. Enter the code, meaning, and, optionally, a description for each value. Leave the Tag column blank.
4. Enter start and end dates
If you do not enter a start date, the new lookup is valid immediately. If you do not enter an end date, the new lookup is valid indefinitely.
5. Save your work.

Lookups for the Channel Manager Dashboard

To implement the channel manager dashboard, create or verify the lookup settings listed in the following table.

Lookup Values for the Channel Manager Dashboard

Lookup Name	Type	Value	Description
PV_INTERACTION_ OBJECT_TYPE	System	ENRQ	Enrollment Request
		GENERAL	General
		MEMBERSHIP	Membership
		OPPORTUNITY	Opportunity
		PVDEALRN	Deal Registration
		PVREFFRL	Referral
		SOFT_FUND	Partner Fund Request
		SPECIAL_PRICE	Special Pricing Request
PV_TRANSACTIONS	System	TRANS_CLAIMS	Claims
		TRANS_DEAL	Deal Registrations
		TRANS_FUND	Fund Requests
		TRANS_OFFER	Offers
		TRANS_OPPTY	Opportunities
		TRANS_ORDERS	Orders
		TRANS_REF	Referrals
		TRANS_SPR	Special Pricing Requests
PV_ CMDASHBOARD_ GRAPH	System	M	Monthly
		Q	Quarterly
PV_TREND_DATE_ RANGE	System	B5YEAR	Last Five Years
		L2YEAR	Last Two Years
		LYEAR	Last Year
		YTD	Year to Date
PV_TREND_PER IOD_TYPE	System	MONTH	Month
		QUARTER	Quarter
		YEAR	Year

Lookups for Deal Registration

To implement deal registration, create or verify the lookup setting listed in the following table.

Lookup Values for Deal Registration

Lookup Name	Type	Value	Description
PV_REFERRAL_ DECLINE_REASON	User	CUST_DTLS_NOT_ VERIFIED	Customer Details Not Verified
		EXISTING_LEAD	Existing Lead
		EXISTING_OPPTY	Existing Opportunity
		MORE_INFO_REQU IRED	More Information Required

Lookups for Partner Funds

To implement partner funds, create or verify the lookup settings listed in the following table.

Lookups for Partner Funds

Lookup	Type	Value	Description
OZF_REQUEST_ STATUS	System	DRAFT	Draft
		APPROVED	Approved
		CLOSED	Closed
		DECLINED	Declined
		VOID	Void
		SUBMITTED_FOR_A PPROVAL	Pending Approval
		RETURNED	Returned
OZF_REQUEST_ CLASS	System	SOFT_FUND	Soft Fund
		SPECIAL_PRICE	Special Price
OZF_REQUEST_TY PE	System	SOFT_FUND	Soft Fund
OZF_SF_DECLINE_ CODE	User	COLLATERAL	Collateral Did Not Meet Criteria
		DUPLICATE	Duplicate Request
		INVALID	Invalid Request
OZF_SF_RETURN_ CODE	User	COLLATERAL	Collateral Submission Requested
		OTHER	Other
		MISS_INFO	Request Missing Information
OZF_ PERFORMANCE_ UOM	System	AMOUNT	Amount
		NUMBER	Number

Lookup	Type	Value	Description
OZF_FUND_ SOURCE	System	SOFT_FUND	Soft Fund
		FUND	Budget
		CAMP	Campaign
		DELV	Deliverable
		EVEH	Event
		EVEO	Event Schedule
		OFFR	Offer
		EONE	One Off Event
		OPTN	Other Partner
		PTNR	Partner
		USER	Person
		PRIC	Price List
		CSCH	Schedule
		VEND	Vendor
OZF_PARTNER_ PERFORMANCE	User	LEAD	Lead
		REVENUE	Revenue

Lookups for the Partner Dashboard

To implement the partner dashboard, create or verify the lookup setting listed in the following table.

Lookup Values for the Partner Dashboard

Lookup Name	Type	Value	Description
PV_USER_ROLES	User	BUSINESS	Business User
		PRIMARY	Primary User
		ALL	All

Lookups for the Partner Profile Attributes

To implement partner profile attributes, create or verify the lookup setting listed in the following table.

Lookup Values for Partner Profile Attributes

Lookup Name	Type	Value	Description
PV_ATTRIBUTE_CATEGORY_TYPE	User	GENERAL	General
		MARKETING	Marketing
		PRM	PRM
		RESOURCE	Resource
		SALES	Sales

Lookups for Partner Programs

To implement partner programs, create or verify the lookup settings listed in the following table.

Lookups for Partner Programs

Lookup	Type	Value	Description
PV_BENEFIT_TYPE	Extensible	PVDEALRN	Deal Registration
		PVREFFRL	Referrals
		OZFSFBEN	Soft Funds
		OTHERS	Other benefit types
		STORES	Stores
PV_BENEFIT_STATUS	User	ACTIVE	Active
		INACTIVE	Inactive
		DRAFT	Draft
		FAILED_VALIDATION	Failed Validation
		INACTIVE	Inactive
		PENDING	Pending

Lookup	Type	Value	Description		
PV_BENEFIT_ENT ITY_STATUS	System	APPROVED	Approved		
		AWAITING_FOR_ PARTNER_ACCE PTANCE	Waiting for partner acceptance		
		CLOSED_BY_ VENDOR	Closed by vendor		
		CLOSED_DEAD_ LEAD	Closed - dead lead		
		CLOSED_FEE_PAID	Closed - fee paid		
		CLOSED_LOST_OP PTY	Closed - lost opportunity		
		COMP_CANCELLED	Compensation cancelled		
		DECLINED	Declined		
		DRAFT	Draft		
		DRAFT	Expired		
		EXPIRED	Extended by vendor		
		EXTENDED_BY_ VENDOR	Compensation being negotiated		
		COMP_BEING_ NEGOTIATED	Payment being processed		
		PAYMENT_BEING_ PROCESSED	Pending approval		
		PENDING_AP PROVAL	Pending customer review		
		PENDING_ CUSTOMER_REV IEW	Processing compensation		
		PROCESSING_COM PENSATION			
		PV_PROGRAM_ BENEFITS	User	AOF	Access to Online Forms
				FPD	Free Product Demo
IBB	Invitations to Business Briefings				
IQW	Invitations to Quarterly Workshops				
PH	Partner Helpdesk				
PN	Partner Newsletter				
PWK	Partner Welcome Kit				
RN	Regular Newflashes				

Lookups for Referral Management

To implement referral management, create or verify the lookup setting listed in the following table.

Lookup Values for Referral Management

Lookup Name	Type	Value	Description
PV_REFFERRAL_ DECLINE_REASON	User	CUST_DTLS_NOT_ VERIFIED	Customer Details Not Verified
		EXISTING_LEAD	Existing Lead
		EXISTING_OPPTY	Existing Opportunity
		MORE_INFO_REQU IRED	More Information Required

Lookups for Special Pricing

To implement special pricing, create or verify the lookup settings listed in the following table.

Lookups for Special Pricing

Lookup Type Code	Type	Value	Description
OZF_REQUEST_STATUS	System	DRAFT	Draft
		APPROVED	Approved
		CLOSED	Closed
		DECLINED	Declined
		SUBMITTED_FOR_APPROVAL	Pending Approval
OZF_REQUEST_CLASS	System	SOFT_FUND	Soft Fund
		SPECIAL_PRICE	Special Price
OZF_REQUEST_TYPE	System	MEET_COMPETITOR	Meet Competitor Price
		BLANKET_REQUEST	Blanket Request
		BID_REQUEST	Bid Request
OZF_SP_REQUEST_DECLINE_CODE	Extensible	CANNOT_MEET NEED_MORE_INFO	Cannot Meet Discount Requested Need More Information
OZF_SP_REQUEST_DISTYPE	System	%	Discount Percent
		AMT	Discount Amount
		NEWPRICE	New Price
OZF_SP_REQUEST_OUTCOME	Extensible	IN_PROGRESS	In Progress
		LOST	Lost
		WON	Won
OZF_FUND_SOURCE	System	SPECIAL_PRICE	Special Price
		FUND	Budget
		CAMP	Campaign
		DELV	Deliverable
		EVEH	Event
		EVEO	Event Schedule
		OFFR	Offer
		EONE	One Off Event
		OPTN	Other Partner
		PTNR	Partner
		USER	Person
		PRIC	Price List
		CSCH	Schedule
VEND	Vendor		

Summary of Concurrent Programs

This appendix covers the following topics:

- Running Concurrent Programs
- Checking Concurrent Program Status
- Concurrent Programs for the Channel Manager Dashboard
- Concurrent Programs for Deal Registration
- Concurrent Programs for Enrollments
- Concurrent Programs for Opportunities
- Concurrent Programs for Partner Funds
- Concurrent Programs for the Partner Locator
- Concurrent Programs for Partner Programs
- Concurrent Programs for Partner Profile Attributes
- Concurrent Programs for Referral Management
- Concurrent Programs for Special Pricing

Running Concurrent Programs

Use the following instructions for running any Oracle Applications concurrent program or program set. You can use these procedures to run or schedule any of the Oracle Partner Management concurrent programs.

Refer to the *Oracle Applications System Administrator's Guide* for complete details on Oracle Applications concurrent programs.

Prerequisites

None.

Steps

1. Log in to the Forms application.
2. Select the appropriate responsibility.
3. Double-click Concurrent Requests.
4. Double-click Run.
5. Select the Single Request radio button.

6. Click OK.
7. Search for the concurrent request that you want to run.
8. Click Submit.
9. Select from the search results.
10. Click OK.
11. Click OK to run the concurrent request.

Checking Concurrent Program Status

Use the following procedure to check the status of a concurrent program.

Prerequisites

None.

Steps

1. Log in to Oracle Forms with the appropriate responsibility. The responsibility for each concurrent program is provided with the program description.
2. Choose View > Request.
The Find Request window opens.
3. In the Find Request window, search for your concurrent program request.
 - If the server is not busy, selecting Find may be the fastest way to find your request.
 - If the server is busy, it may be better to enter search criteria and look for Specific Requests.
4. The Request window displays a list of submitted requests. The Oracle Marketing concurrent programs should be listed.
5. Select Refresh Data occasionally to check the completion status.
6. Once in the "red" state or Phase = "completed," the View Output and View Log buttons will become active (if the log output files have been setup correctly)

Concurrent Programs for the Channel Manager Dashboard

The following table provides information about the concurrent programs used by the channel manager dashboard.

Concurrent Program for the Channel Manager Dashboard

Program	Required	Description
Generate Territory Packages	Yes	<p>After defining new territories or updating existing territories, the territory administrator must execute this concurrent program. The parameter values for this program must have Oracle Partner Manager specified for usage, and Partner specified as transaction type. The new territory definitions are available for partner channel team assignment only after the concurrent request is executed successfully.</p> <p>Responsibility: CRM Administrator</p>
OZF-TM: Generate Party List for Market Qualifier	Yes	<p>Matches customer orders to offers and populates a denormalized table AMS_PARTY_MARKET_SEGMENTS with customer segmentation information based on territory definitions.</p> <p>This program needs to be run in two situations:</p> <ul style="list-style-type: none">• When a new territory is created. Run the program after running the Generate Territory Package program.• When a new customer is created as the result of a referral. <p>Note: This program must be run after the Generate Territory Packages program and before OZF-TM: Net Accrual Engine to ensure that the net accrual engine accurately matches customer orders to offers.</p> <p>Responsibility: Oracle Trade Management Administrator</p>

Program	Required	Description
PV: Channel Team Assignment for Partners in TOTAL/ INCREMENTAL Mode	Yes	<p>Parameter Name: Mode</p> <p>Parameter Values: TOTAL or INCREMENTAL</p> <p>Run this concurrent program in TOTAL mode if you have installed Oracle Partner Management for the first time or have just upgraded to a new version of Oracle Partner Management. Before running the program, a territory hierarchy must be set up for your organization. Once the hierarchy is set up, running this program assigns channel teams to partners, based on the territory hierarchy.</p> <p>You might also want to run this program in the TOTAL mode if your organization makes significant changes to the territory hierarchy.</p> <p>Run this program in INCREMENTAL mode when you have:</p> <ul style="list-style-type: none"> • Set the profile option PV: Territory Assignment Online is set to No. • Updated any partner's transaction qualifiers from an Oracle application other than Oracle Partner Management. <p>Frequency: Run in TOTAL mode one time after upgrading or installing Oracle Partner Management or when the territory definition undergoes a major change. Run in INCREMENTAL mode each day, or after making minor changes to territories.</p> <p>Responsibility: PRM concurrent requests</p>

Program	Required	Description
PV: Define Channel team for specific territories	Yes	<p data-bbox="1146 275 1458 323">Run this concurrent program when there is a change in:</p> <ul data-bbox="1146 344 1468 814" style="list-style-type: none"> <li data-bbox="1146 344 1458 554">• The assignment of channel manager resources for a territory (for example, when a channel manager leaves or a new channel manager is added to the organization). <li data-bbox="1146 575 1468 814">• Territory transaction qualifier values (for example, when a territory that was originally defined to contain partners in California now contains partners in California, Nevada, and Oregon). <p data-bbox="1146 835 1458 911">This program should be run each time there is a change in the territory setup.</p> <p data-bbox="1146 932 1370 978">Responsibility: PRM concurrent requests</p>

Program	Required	Description
PV: Update Partner Status	Yes	<p>To determine if the status of a partner is active, all the following conditions must be true:</p> <ol style="list-style-type: none"> 1. Relationship status between partner and vendor is active and the relationship is not end dated. 2. Partner Organization status is active. 3. Vendor Organization status is active. 4. The partner organization resource record is not end dated in CRM resource manager. <p>Checking for partner status in all the above-mentioned places causes significant performance issues. To address this issue a STATUS column has been added to the PV_PARTNER_PROFILE table. The STATUS column consolidates the Partner Status definition, which improves performance. In addition, when a partner's status changes, a Workflow Business Event is raised. Any Oracle application can subscribe to this business event to perform necessary action.</p> <p>This concurrent program needs to be scheduled to update the partner status periodically. <i>Between the concurrent job executions, it may be possible for the partner status to be in an inconsistent state as the partner data can be updated through other Oracle Application products.</i></p> <p>When the concurrent program return status is error or warning, use the concurrent program's log file for additional information.</p> <p>Frequency: Every day (minimum)</p> <p>Responsibility: PRM concurrent requests</p>

Program	Required	Description
Refresh AS period days	Yes	<p>The date information that populates the graphs that appear on the Channel Manager dashboard is taken from the General Ledger Accounting Calendar. Once the calendar is set up, the Refresh AS period days concurrent program takes information from the gl_daily_rates table and populates the as_period_days table. Oracle Partner Management uses data from this table to build the x-axis of the dashboard graphs.</p> <p>To set up the calendar, log into Oracle Forms as the General Ledger Super User and navigate to Setup > Financial > Accounting > Calendar.</p> <p>It is recommended that this program be run once a month.</p> <p>Responsibility: Oracle Sales Administrator</p>
Refresh Multi-Currency Conversion Rate (AS_PER IOD_RATES)	Yes	<p>Once the General Ledger Accounting Calendar is set up, this program takes information from the gl_daily_rates table and populates the as_period_rates table.</p> <p>It is recommended that this program be run once a month. It should be run after the Refresh AS period days concurrent program is run.</p> <p>Responsibility: Oracle Sales Administrate</p>

Concurrent Programs for Deal Registration

The following table provides information about the concurrent programs used by deal registration.

Concurrent Program for Deal Registration

Program	Required	Description
PV - Update Referral/Deal Status	Yes	<p>Evaluates all approved deal registrations to update the status to one of the following closed or expired statuses:</p> <ul style="list-style-type: none">• Closed. Dead Lead• Closed. Lost Opportunity• Closed. Opportunity Won• Expired <p>Responsibility: PRM concurrent requests</p>

Concurrent Programs for Enrollments

The following table provides information about the concurrent programs used by enrollments.

Concurrent Program for Enrollments

Program	Required	Description
PV: Send enrollment notifications to partner user	Yes	<p>Sends notifications to partner primary users when either of the following occurs:</p> <ul style="list-style-type: none">• The partner's membership in a particular program is about to or has expired (based upon a partner program's criteria). The primary user receives a Renewal notification.• The signed contract for a program that a partner wants to join has not been received within a specified period of time. The primary user receives a Contract Not Received notification. <p>It is recommended that you run this program daily.</p> <p>Responsibility: PRM concurrent requests</p>

Program	Required	Description
PV: Expire Ended Program Membership, and Renew Early Renewed Program Memberships	Yes	<p>Changes a partner's program membership status to Expired if the partner's membership end date is past the current system date. When the status of a global partner's program membership status is Expired, the program membership of each of its subsidiaries changes to Expired as well.</p> <p>The program also changes a partner's program membership status to Renew for all early renewals with a start date in the past.</p> <p>It is recommended that you run this program daily.</p> <p>Responsibility: PRM concurrent requests</p>
PV: Process the errored enrollment requests for approval	Yes	<p>If the Oracle Approval Manager application encounters an error, it is possible that partner self-service enrollment requests will not be routed for approval. This program identifies and processes orphaned approval requests and routes them to their appropriate reviewer(s).</p> <p>It is recommended that you run this program bi-weekly.</p> <p>Responsibility: PRM concurrent requests</p>

Concurrent Programs for Opportunities

The following table provides information about the concurrent programs used by opportunities.

Concurrent Programs for Opportunities

Program	Required	Description
PV Unassigned Opportunity Process After TimeOut	Optional	<p>This concurrent program invokes the partner matching engine to route indirect opportunities that have been unassigned for more than a specified number of days since the opportunity was created. The number of days after which an opportunity is routed is determined by the profile PV: Unassigned Opportunity Timeout. (Days)</p> <p>The parameters of the concurrent program are:</p> <p>Country - Process opportunities only for country specified.</p> <p>User Name - The user that is determined to be the assignment manager for the opportunity routing.</p> <p>From Date - Consider only those opportunities that have been created after this date.</p> <p>Responsibility: PRM concurrent requests</p>
PV - Initial Build for Partners Open/Won Opportunities	Yes	<p>This program initially builds or rebuilds the materialized view to display the values in the Opportunity Open and Won Bin.</p> <p>The parameters of the concurrent program are:</p> <p>No_of_process - For systems with multiple CPUs, this sets the number of parallel database processes that are started to build materialized views.</p> <p>Next_extent - Database extent size to allocate whenever more space is needed to store the data.</p> <p>Responsibility: PRM concurrent requests</p>

Program	Required	Description
Spatial Information for Locations Batch Update	Yes	<p>Acquire latitude and longitude values for locations in the TCA registry.</p> <p>For addresses that already have spatial data, the program updates the records with the latest information from eLocation. (For more information, see <i>Oracle Trading Community Architecture eLocation Spatial Data Integration User Guide</i>.) This is needed for partner matching to determine the radial distances between a customer on the opportunity and the partners.</p> <p>Responsibility: Trading Community Manager</p>
Workflow Background Process - POL Assignment Routing	Yes	<p>Process channel manager time-out and partner time-out activities in opportunity routing.</p> <p>The parameters of the concurrent program are:</p> <p>Item_type: POL Assignment Routing</p> <p>Process Deferred: N</p> <p>Process Timeout: Y</p> <p>Process Stuck: N</p> <p>Responsibility: Workflow Administrator</p>

Program	Required	Description
Workflow Background Process - POL Automated Partner Matching	Yes	<p>When a lead is created, and the channel selection engine selects an indirect channel based on the profile OS: Auto Convert Lead to Opportunity, the lead is converted to an indirect opportunity. Then, this concurrent program starts the workflow process that initiates the automatic background matching process, which automatically matches and routes opportunities to partners.</p> <p>This concurrent program also performs routing to partners on the campaign specified on the opportunity if the profile option PV: Enable Automatic Routing by Campaign is set to Y. If the profile option PV: Enable Automatic Routing by Campaign is set to N, program instead adds partners participating in the campaign to the external sales team.</p> <p>Item_type: POL Automated Partner Matching</p> <p>Process Deferred: Y</p> <p>Process Timeout: N</p> <p>Process Stuck: N</p> <p>Responsibility: Workflow Administrator</p>

Program	Required	Description
Workflow Background Process - POL NotifyParty	Yes	<p>Sends a notification to a channel manager when an indirect opportunity is routed to one of the channel manager's partners and the partner also submitted the deal registration that resulted is the creation of the same opportunity.</p> <p>The parameters of the concurrent program are:</p> <p>Item_type: POL Notify Party Process Deferred: Y Process Timeout: N Process Stuck: N Responsibility: Workflow Administrator</p>
PV - External Salesteam Mibration	Yes (Patchset B only)	<p>Organizations that implement that Patchset B need to run this program.</p> <p>Earlier implementations of Oracle Partner Management allowed a partner contact to exist on an opportunity or a lead, or to be included in a customer's external sales team, even when the partner organization was not associated with the object. As of Patchset B, a partner contact is accessed through the partner organization, and thus can not be accessed if the partner organization has been removed from an object. Run this program to add the partner organization to opportunities, leads, and customer external sales teams for which a partner contact is associated independently of its partner organization.</p> <p>Responsibility: PRM concurrent requests</p>

Concurrent Programs for Partner Funds

One concurrent program is required for Partner Funds: OZF - TM: Release Committed Budget Amount After Grace Period. This program closes a soft fund request after the grace period has passed, disables the Submit Claim button on a fund request, and reconciles liabilities. It can be scheduled to run periodically. The responsibility is Oracle Trade Management Administrator.

Concurrent Programs for the Partner Locator

The following table provides information about the concurrent programs used by the partner locator.

Concurrent Program for the Partner Locator

Program	Required	Description
Spatial Information for Locations Batch Update	Yes	<p>Acquire latitude and longitude values for locations in the TCA registry.</p> <p>For addresses that already have spatial data, the program updates the records with the latest information from eLocation.(For more information, refer to the <i>Oracle Trading Community Architecture eLocation Spatial Data Integration User Guide</i>.)</p> <p>This concurrent program needed for the Partner Locator to determine the radial distances between a customer and a partner.</p> <p>Responsibility: Trading Community Manager</p>
PV Refresh Attribute Text Table	Yes	<p>Allows the attribute details for a particular partner to be used in the matching process and to calculate performance and derived attributes for each partner.</p> <p>There are two options for running this program: full refresh or new partners only refresh. Full refresh is the default.</p> <p>The new partners only option picks up all the partners that have been created since the last refresh of this type. The last refresh date is stored in the profile option PV: Refresh Search Attributes Last Update Date.</p> <p>Responsibility: PRM concurrent requests</p>

Concurrent Programs for Partner Programs

The following table provides information about the concurrent programs used by partner programs.

Concurrent Program for Partner Programs

Program	Required	Description
PV: Close Ended Programs and Memberships	No	Assigns a status of Closed to programs with end dates that are past the current system date. Responsibility: PRM concurrent requests
PV: Refresh Partner Program Eligibility	Yes	Evaluates a partner's eligibility to enroll in a partner program based on the program's prerequisites. PV: Refresh Partner Program Eligibility should be run at least once a day to make sure that existing partners are evaluated for eligibility to join new partner programs. If you do not run this program, new partner programs will be available only to new partners. Responsibility: PRM concurrent requests
PV - Update user resp when resp mapping is created or deleted	Yes	When a channel administrator modifies the responsibility mappings, it impacts the responsibilities assigned to partner users. This program updates partner users' responsibilities after a change has been made to existing responsibility mappings. There is no fixed frequency in which this program should be run. Responsibility: PRM concurrent requests
PV: Assign/Revoke User Responsibilities	Yes	This program is used to assign or revoke responsibilities of partner users based on their organization's program memberships. This program runs automatically when the channel administrator adds, changes, or deletes a responsibility. Responsibility: PRM concurrent requests

Concurrent Programs for Partner Profile Attributes

The following table provides information about the concurrent programs used by partner profile attributes.

Concurrent Program for Partner Profile Attributes

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

Concurrent Programs for Referral Management

The following table provides information about the concurrent programs used by referral management.

Concurrent Program for Referral Management

Program	Required	Description
OZF-TM: Generate Party List for Market Qualifier	Yes	<p>Matches customer orders to offers and populates a denormalized table AMS_PARTY_MARKET_SEGMENTS with customer segmentation information based on territory definitions.</p> <p>This program needs to be run in two situations:</p> <ul style="list-style-type: none">• When a new territory is created. Run the program after running the Generate Territory Package program.• When a new customer is created as the result of a referral. <p>Note: This concurrent program must be run before OZF-TM: Net Accrual Engine to ensure that the net accrual engine accurately matches customer orders to offers.</p> <p>Responsibility: Oracle Trade Management Administrator</p>

Program	Required	Description
OZF-TM: Net Accrual Engine	Yes	<p>Calculates the net accruals for all offers of type Net Accrual. Referral management uses the program to calculate the commission a partner earns on referrals.</p> <p>The net accrual engine references a customer denormalized table that is populated by the OZF-TM: Generate Party List for Market Qualifiers concurrent program. When a referral is created, the system may create a new customer. The new customer is not in the customer denormalized table until the OZF-TM: Generate Party List for Market Qualifiers program is run.</p> <p>Run the OZF-TM: Net Accrual Engine program before you run the PV - Referral Compensation Order Completion program and when you want to calculate how much your partners have accrued. It is recommended that you run OZF-TM: Net Accrual Engine once a month.</p> <p>Responsibility: Oracle Trade Management Administrator</p>
PV - Update Referral/Deal Status	Yes	<p>Evaluates all approved referrals to update the status to one of the following values:</p> <ul style="list-style-type: none"> • Closed - Dead Lead • Closed - Lost Opportunity • Closed - Opportunity Won • Expired <p>Run this program to close approved referrals. You must run this program before running the PV - Referral Compensation Order Completion program. It is recommended that you run PV - Update Referral/Deal Status weekly to make sure that the referral statuses are up to date.</p> <p>Responsibility: PRM concurrent requests</p>

Program	Required	Description
PV - Referral Compensation Order Completion	Yes	<p>Creates claims and starts the payment process for referrals that have generated fulfilled orders. It is recommended that you run this program once a month.</p> <p>Responsibility: PRM concurrent requests</p>
Generate Territory Package	Yes	<p>As a part of the standard territory creation process, this program must be run after a territory is created.</p> <p>Responsibility: CRM Administrator</p>
DQM Staging Program	Yes	<p>Populates the search table against which the DQM process performs queries. You should run this program when a new party (hz_parties) is created.</p> <p>To run the program, you must be able to log in with the Trading Community Manager responsibility.</p> <p>You must provide the following parameters to run the DQM Staging Program for Referral Management:</p> <ul style="list-style-type: none"> • Number of Workers = 5 • Staging Command = STAGE_ALL_DATA • Continue previous execution = No <p>No additional values need to be set.</p> <p>Responsibility: Trading Community Manager</p>

Concurrent Programs for Special Pricing

One concurrent program is required for Special Pricing: OZF - TM: Release Committed Budget Amount After Grace Period. This program closes a special pricing request after the grace period has passed, disables the Submit Claim button on a special pricing request, and reconciles liabilities. It can be scheduled to run periodically. The responsibility is Oracle Trade Management Administrator.

Glossary

Assignment

When an opportunity is matched to partners.

Assignment Routing

Process that routes an opportunity assignment to partners.

Attribute

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

Benefit

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

Campaign

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

Channel Administrator

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

Channel Manager

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

Channel Manager Dashboard

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

Channel Manager Timeout

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

Customer

A purchaser of products or services.

Compensation

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

Concurrent Manager

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

Deal Registration

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

Distributor

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

DQM

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

Enrollment

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

Existing Inventory

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

Expense Breakdown

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

Forms

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

Forms Server

A Forms server is a type of application server that hosts the Forms server engine. It mediates between the desktop client and the database, providing input windows for

the Forms-based products on the desktop client and creating or changing database records based on user actions.

Framework

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

Fund Request

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

Fund Request Claim

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

Hyperlink

A link to another page.

Indirect Managed Partner/IMP

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

Joint Selling

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

Joint Assignment

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

Managed Partner

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

Manufacturer

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

Marketing Activity (Partner Fund)

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

Membership Level

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

Multiple-Parallel

In this routing option, you can also broadcast the opportunity to multiple partners for review at the same time. However, only the partner who accepts it first, will win

the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner LOV window.

Multiple Serial

This is a variation of the single routing option and you can create an ordered list of partners. The opportunity will be offered to the first partner for review. If the partner accepts it, the assignment is successful. If the partner declines it, it is offered to the second partner in the list for review. You need to select at least two partners from the partner LOV window.

New Inventory

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

Note Status

There are three statuses available for notes:

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

Note Type

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

Offer

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

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

Opportunity

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

Partner

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

Partner Administrator

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

Partner Contact

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

Partner Dashboard

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

Partner Fund

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

Partner Funds Liability

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

Partner List

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

Partner Timeout Period

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

Partner Type

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

Partner User

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

Personalize

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

Program

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

Program Benefit

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

Prospect

Prospective customers who have not previously purchased products or services.

Record

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

Referral

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

Reseller

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

Similar Special Pricing Request

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

Special Pricing

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

Special Pricing Claim

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

Special Pricing Request

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

Special Pricing Request Type

The request types are:

- Meet Competitor Price: When a partner wants to match a competitor's price, they can ask you to reduce the price to complete a sale.
- Bid Request: When a partner wants to win a deal for a specific end-customer.

- Blanket Request: When a partner has inventory in his warehouse and has not been able to move it, they can ask for a discount to move the unsold inventory.

Special Pricing Liability

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

Status

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

Structured Query Language (SQL)

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

Single Assignment

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

Summary Page

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

Tab

Main divisions within the user interface of Oracle Partners.

TAP

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

TCA or Trading Community Architecture

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

Vendor

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

Workflow

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

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

Workflow Attributes

Workflow attributes control the behavior of the workflow.

Workflow Monitor

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

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