Oracle® Partner Management

Implementation and Administration Guide

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Oracle Partner Management Implementation and Administration Guide, Release 12 .2

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- Did you find any errors in the information?
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Preface

Intended Audience

Welcome to Release 12 .2 of the *Oracle Partner Management Implementation and Administration Guide.*

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 E-Business Suite 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 how to create vendor users and then assign responsibilities, roles, and permissions.
- Chapter 4 shows how to set up the Channel Manager dashboard.
- Chapter 5 describes the setup for partners and partner users.
- Chapter 6 explains how to create the partner dashboard.
- Chapter 7 explains how to set up and maintain the partner profile attributes.
- 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 management 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 ongoing administration for opportunity and lead referral benefits.
- Chapter 12 explains how to set up and perform ongoing administration for deal registration benefits.
- Chapter 13 explains how to set up and perform ongoing administration for special pricing benefits.
- Chapter 14 explains how to set up and perform ongoing administration for partner fund benefits.
- Chapter 15 describes some common implementation and administration tasks.
- Chapter 16 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.

See Related Information Sources on page xvii for more Oracle E-Business Suite product information.

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Structure

1 Introduction to Oracle Partner Management
2 Dependencies and Integration Points
3 Setting Up Vendor Users
4 Setting Up the Channel Manager Dashboard
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Related Information Sources

Online Documentation

All Oracle E-Business Suite documentation is available online (HTML or PDF).

- **PDF** - See the Oracle E-Business Suite Documentation Library for current PDF documentation for your product with each release. The Oracle E-Business Suite Documentation Library is also available on My Oracle Support and is updated frequently

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **Release Notes** - For information about changes in this release, including new features, known issues, and other details, see the release notes for the relevant product, available on My Oracle Support.

- **Oracle Electronic Technical Reference Manual -** The Oracle Electronic Technical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for each Oracle E-Business Suite product. This information helps you convert data from your existing applications and integrate Oracle E-Business Suite data with non-Oracle applications, and write custom reports for Oracle E-Business Suite products. The Oracle eTRM is available on My Oracle Support.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter data, query, and run reports using the user interface (UI) of Oracle E-Business Suite. This guide also includes information on setting user profiles, as well as running and reviewing concurrent programs.

You can access this guide online by choosing "Getting Started with Oracle Applications" from any Oracle E-Business Suite product help file.

Guides Related to This Product

Oracle Advanced Pricing Implementation Guide

This guide show you how to define pricing rules that service the pricing requirements of Oracle applications. Pricing rules control the pricing actions that are applied to customer transactions such as price lists, price agreements, formulas, and modifiers. With Oracle Advanced Pricing, you can attach qualifiers to a price list that enables an item have more than one price list. You can also set up block pricing, promotional limits, multiple currency conversion, and multiple contexts per sales order.

Oracle Channel Revenue Management Implementation and Administration Guide

Channel Revenue Management enables users to efficiently plan, promote, execute, and manage the order to cash process for improved sales and return on investment (ROI), and reduced loss in revenue. Use this guide to learn about the different products in the Oracle Channel Revenue Management Suite and the other Oracle E-Business Suite products with which this product family integrates. You can learn how to set up users, customers, and suppliers, and perform the basic configurations that will be used by all the products in this suite.

Oracle Common Application Calendar Implementation Guide

This guide describes how to define tasks and note types, set up task statuses and status transition rules, define task priorities, set up data security, and map notes and references to source objects such as a sales lead to Task Manager. In addition, it describes how to create users and run concurrent programs to retrieve new and

updated tasks.

Oracle Content Manager Implementation and Administration Guide

Oracle Content Manager ensures accurate and consistent content across applications by providing a central repository for storing and managing content. Oracle Content Manager integrates with Oracle E-Business Suite to enable the seamless transition of content between applications. This integration facilitates single user sign-on to associate content such as product images, white papers, and newsletters with E-Business objects such as store sections, inventory products, and marketing campaigns.

Oracle Contracts Implementation and Administration Guide

Oracle Contracts enable organizations to define the terms and conditions of a contract between the parties that are buying and selling products or services. These can be terms for pricing, shipment, payment, quality, and other business and legal obligations. Oracle Contracts provides the common infrastructure components for other contracts modules such as Oracle Sales Contracts, Oracle Procurement Contracts, Oracle Service Contracts, and Oracle Project Contracts.

Oracle General Ledger Implementation Guide

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

Oracle HRMS Documentation Set

This set of guides explains how to define your employees, so you can give them operating unit and job assignments. It also explains how to set up an organization (operating unit). Even if you do not install Oracle HRMS, you can set up employees and organizations using Oracle HRMS windows. Specifically, the following manuals will help you set up employees and operating units:

- **Oracle HRMS Enterprise and Workforce Management Guide**

  This user guide explains how to set up and use enterprise modeling, organization management, and cost analysis.

- **Oracle HRMS Workforce Sourcing, Deployment, and Talent Management Guide**

  Use this guide to find out about setting up employees and managing your people resources.

Oracle Inventory User's Guide

This guide enables you to configure the Oracle Inventory structure to best represent your company's inventory sites and business units after you have defined your required ledger and key flexfields. You can also learn about centralized and decentralized

inventory structures, and controls and reference options for using and maintaining inventory items such as categories, commodity codes, attributes, statuses, relationships, and picking rules.

Oracle iStore Implementation and Administration Guide

This guide enables your business to establish business-to-business (B2B) and business-to-consumer (B2C) electronic commerce (e-commerce). You can learn how to build, test, and launch sophisticated online stores in multiple languages and currencies that can store customer data, provide flexible pricing, track shopping lists, orders and returns, and target different customer segments and organizations. Use this guide to integrate Oracle iStore with other Oracle applications such as Oracle Workflow or Oracle Quoting for added functionality and features.

Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

Oracle Order Management Implementation Manual

This guide describes how to set up Order Management transaction types, assign workflows and order numbering sequence to them. It enables you to implement basic pricing component such as price lists, formulas, agreements, and modifiers. You can also define default values for basic shipping information such as units of measurement, pick release criteria and rules, weight and volume calculations for freight charges, and delivery grouping rules. This guide also describes how to set up required and other integrated applications based on your business needs. For example,you set up Oracle Advanced Planning and Scheduling (APS) and Oracle Inventory to provide scheduling of shipment and reservation of on-hand inventory to sales order lines. You set up Oracle Purchasing if your business supports drop shipments, or Oracle Bills of Material and Oracle Configurator if you sell models and kits. You can also learn how to set up the Configure-to-Order (CTO) process that enables you to define a possibly unique item, build the item using Oracle's Manufacturing Applications Suite, and process the item as if it were a standard item through the shipping and invoicing activities. This guide also describes how to set up the Assemble-to-Order (ATO and the Pick-to-Order (PTO) processes.

Oracle Payments Implementation Guide

This guide describes how Oracle Payments, as the central payment engine for the Oracle E-Business Suite, processes transactions, such as invoice payments from Oracle Payables, bank account transfers from Oracle Cash Management, and settlements against credit cards and bank accounts from Oracle Receivables. This guide also

describes how Oracle Payments is integrated with financial institutions and payment systems for receipt and payment processing, known as funds capture and funds disbursement, respectively. Additionally, the guide explains to the implementer how to plan the implementation of Oracle Payments, how to configure it, set it up, test transactions, and how to use it with external payment systems.

Oracle Quoting Implementation Guide

Oracle Quoting enables organizations propose product solutions and negotiate prices, while enforcing consistent business rules throughout the sales cycle. This guide describes how to set up quote statuses to indicate the evolution of a quote to an order, define status transition rules, set up defaults for an operating unit, and define credit check rules. You must also set up integration with Oracle Sales Contracts, Oracle Incentive Compensation, Oracle Territory Manager, and Oracle Approvals Management.

Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

Oracle Sales Implementation Guide

This guide enables you to set up users, user groups, and roles, define forecast categories that group products and services to be included in a forecast, set up and enable currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperability and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Channel Revenue Management, Oracle Partner Management, and Oracle Incentive Compensation.

Oracle TeleSales Implementation Guide

This guide describes how you can set up Oracle TeleSales so telesales agents can convert a sales inquiry or a customer call into an order. You must set up agent and customer interaction tracking, enable web directory assistance for agents, enable web collaboration, set up opportunity forecasting so agents enter forecast amounts for a product line and receive sales credits, and set up marketing source codes to track the marketing activity responsible for a sale or a sales activity. Oracle TeleSales interacts with Oracle Scripting, Oracle Email Center, Oracle Marketing, Oracle Territory Manager, Oracle Product Hub, Oracle One-to-One Fulfillment, Oracle Universal Work Queue, Oracle Sales, and Oracle Quoting.

Oracle Territory Manager Implementation Guide

With Oracle Territory Manager, you can create geographic territories, account territories, and sales territories using predefined matching attributes to identify territories such as the geographic matching attribute of country. You can also create territory hierarchies to make the territory assignments and searches more efficient. Before you implement Oracle Territory Manager, you must define the purpose of defining territories for your business, the level of usage that the resources assigned to territories may require, and the requirement for overlays.

Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addition, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

Installation and System Administration

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle E-Business Suite data.

Oracle E-Business Suite Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release 12.2, or contemplating significant changes to a configuration. After describing the Oracle E-Business Suite architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

Oracle E-Business Suite CRM System Administrator's Guide

This manual describes how to implement the CRM Technology Foundation (JTT) and use its System Administrator Console.

Oracle E-Business Suite Developer's Guide

This guide contains the coding standards followed by the Oracle E-Business Suite development staff. It describes the Oracle Application Object Library components needed to implement the Oracle E-Business Suite user interface described in the *Oracle E-Business Suite User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle E-Business Suite. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

Oracle E-Business Suite Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle E-Business Suite. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle E-Business Suite Release 12.2, or as part of an upgrade to Release 12.2.

Oracle E-Business Suite Maintenance Guide

This guide contains information about the strategies, tasks, and troubleshooting activities that can be used to help ensure an Oracle E-Business Suite system keeps running smoothly, together with a comprehensive description of the relevant tools and utilities. It also describes how to patch a system, with recommendations for optimizing typical patching operations and reducing downtime.

Oracle E-Business Suite Security Guide

This guide contains information on a comprehensive range of security-related topics, including access control, user management, function security, data security, and auditing. It also describes how Oracle E-Business Suite can be integrated into a single sign-on environment.

Oracle E-Business Suite Setup Guide

This guide contains information on system configuration tasks that are carried out either after installation or whenever there is a significant change to the system. The activities described include defining concurrent programs and managers, enabling Oracle Applications Manager features, and setting up printers and online help.

Oracle E-Business Suite User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle E-Business

Suite development staff. It describes the UI for the Oracle E-Business Suite products and tells you how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Approvals Management Implementation Guide

This guide describes transaction attributes, conditions, actions, and approver groups that you can use to define approval rules for your business. These rules govern the process for approving transactions in an integrated Oracle application. You can define approvals by job, supervisor hierarchy, positions, or by lists of individuals created either at the time you set up the approval rule or generated dynamically when the rule is invoked. You can learn how to link different approval methods together and how to run approval processes in parallel to shorten transaction approval process time.

Oracle Diagnostics Framework User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests for Oracle E-Business Suite using the Oracle Diagnostics Framework.

Oracle E-Business Suite Flexfields Guide

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

Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

Oracle E-Business Suite Multiple Organizations Implementation Guide

This guide describes how to set up multiple organizations and the relationships among them in a single installation of an Oracle E-Business Suite product such that transactions flow smoothly through and among organizations that can be ledgers, business groups,

legal entities, operating units, or inventory organizations. You can use this guide to assign operating units to a security profile and assign this profile to responsibilities such that a user can access data for multiple operating units from a single responsibility. In addition, this guide describes how to set up reporting to generate reports at different levels and for different contexts. Reporting levels can be ledger or operating unit while reporting context is a named entity in the selected reporting level.

Oracle e-Commerce Gateway Implementation Guide

This guide describes implementation details, highlighting additional setup steps needed for trading partners, code conversion, and Oracle E-Business Suite. It also provides architecture guidelines for transaction interface files, troubleshooting information, and a description of how to customize EDI transactions.

Oracle e-Commerce Gateway User's Guide

This guide describes the functionality of Oracle e-Commerce Gateway and the necessary setup steps in order for Oracle E-Business Suite to conduct business with trading partners through Electronic Data Interchange (EDI). It also describes how to run extract programs for outbound transactions, import programs for inbound transactions, and the relevant reports.

Oracle iSetup User's Guide

This guide describes how to use Oracle iSetup to migrate data between different instances of the Oracle E-Business Suite and generate reports. It also includes configuration information, instance mapping, and seeded templates used for data migration.

Oracle Product Hub Implementation Guide

This guide explains how to set up hierarchies of items using catalogs and catalog categories and then to create user-defined attributes to capture all of the detailed information (such as cost information) about an object (such as an item or change order). It also explains how to set up optional features used in specific business cases; choose which features meet your business' needs. Finally, the guide explains the set up steps required to link to third party and legacy applications, then synchronize and enrich the data in a master product information repository.

Oracle Product Hub User's Guide

This guide explains how to centrally manage item information across an enterprise, focusing on product data consolidation and quality. The item information managed includes item attributes, categorization, organizations, suppliers, multilevel structures/bills of material, packaging, changes, attachments, and reporting.

Oracle Web Applications Desktop Integrator Implementation and Administration Guide

Oracle Web Applications Desktop Integrator brings Oracle E-Business Suite functionality to a spreadsheet, where familiar data entry and modeling techniques can be used to complete Oracle E-Business Suite tasks. You can create formatted spreadsheets on your desktop that allow you to download, view, edit, and create Oracle E-Business Suite data, which you can then upload. This guide describes how to implement Oracle Web Applications Desktop Integrator and how to define mappings, layouts, style sheets, and other setup options.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle E-Business Suite product that includes workflow-enabled processes. It also describes how to manage workflow processes and business events using Oracle Applications Manager, how to monitor the progress of runtime workflow processes, and how to administer notifications sent to workflow users.

Oracle Workflow Developer's Guide

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

Oracle Workflow User's Guide

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

Oracle XML Gateway User's Guide

This guide describes Oracle XML Gateway functionality and each component of the Oracle XML Gateway architecture, including Message Designer, Oracle XML Gateway Setup, Execution Engine, Message Queues, and Oracle Transport Agent. It also explains how to use Collaboration History that records all business transactions and messages exchanged with trading partners.

The integrations with Oracle Workflow Business Event System, and the Business-to-Business transactions are also addressed in this guide.

Oracle XML Publisher Administration and Developer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce outputs to meet a variety of business needs. Outputs include: PDF, HTML, Excel, RTF, and eText (for EDI and EFT transactions). Oracle XML Publisher can be used to generate reports based on existing Oracle E-Business Suite report data, or you can use Oracle XML Publisher's data extraction engine to build your own queries. Oracle XML Publisher also provides a

robust set of APIs to manage delivery of your reports via e-mail, fax, secure FTP, printer, WebDav, and more. This guide describes how to set up and administer Oracle XML Publisher as well as how to use the Application Programming Interface to build custom solutions. This guide is available through the Oracle E-Business Suite online help.

Oracle XML Publisher Report Designer's Guide

Oracle XML Publisher is a template-based reporting solution that merges XML data with templates in RTF or PDF format to produce a variety of outputs to meet a variety of business needs. Using Microsoft Word or Adobe Acrobat as the design tool, you can create pixel-perfect reports from the Oracle E-Business Suite. Use this guide to design your report layouts. This guide is available through the Oracle E-Business Suite online help.

Training and Support

Training

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

You have a choice of educational environments. You can attend courses offered by Oracle University at any 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 your product working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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.

1

Introduction to Oracle Partner Management

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
- Users and Security

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 1-3
- Partner Profiling, page 1-3
- Programs and Enrollment, page 1-4
- Opportunity Management, page 1-4
- Referral Management, page 1-4
- Deal Registration, page 1-5
- Special Pricing Management, page 1-6
- Partner Funds Management, page 1-7
- Partner Locator, page 1-7

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 catalogs, and create proposals.
- 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.

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. Out of the box, the profiling framework ships with numerous partner profile attributes such as Partner Industry, Partner Level and Partner Annual Revenue. In addition, the implementing company can create custom profile attributes to capture partner profiles that are important to their line of business. For more information, see

Partner profile information can be manually entered by the partner user or channel manager via the partner profile page or can be derived from partner data that are stored in external tables, for example, TCA, or from partner transactions, such as orders placed by partners. 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.

Related Topics

Overview of Partner Profile Attributes, page 7-1

Working with Attributes, page 7-17

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

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 referral can also be created by a vendor employee, acting on behalf of a partner.
- A configurable questionnaire allows the vendor to collect relevant information about a potential opportunity.
- Flexible approval rules can be set up using the Oracle Approval Management System based on multiple criteria like Partner Location, Customer location or Partner Type. These approval rules evaluate the approvers who will be required to approve the Referral.
- Notifications can be sent out to relevant people at each step of the referral lifecycle. Notifications are sent out based on the message templates seeded in Oracle Workflow and the Notification-to-Recipient mappings setup in the Referral Benefit.
- 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 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.

- A deal registration can also be created by a vendor employee, acting on behalf of a partner.
- Flexible approval rules can be set up using the Oracle Approval Management System based on multiple criteria, such as Partner Location, Customer location or Partner Type. These approval rules evaluate the approvers who will be required to approve the Deal Registration.
- Notifications can be sent out to relevant people at each step of the Deal Registration lifecycle. Notifications are sent out based on the message templates seeded in Oracle Workflow and the Notification-to-Recipient mappings set up in the Deal Registration Benefit.
- 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 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.
- The vendor can gather competitive information for products.
- The vendor can create claims and see outstanding special pricing requests.

- A claim can also be created by a partner user.

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 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.
- Vendors can define standard processes 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.

Users and Security

Access to program enrollments is controlled based on user types.

User Types

- Vendor Approvers - Employees in the vendor organization who can approve enrollment requests. After they have performed the approval, they continue to have

access to the enrollment request.

- Administrative Users - Employees in the partner organization who can view and update all enrollment requests.
- Channel Manager of a Partner - This user can view and update enrollments of the partners that he or she manages.
- Partner Users - Partner Users can only enroll in programs.

Access to programs is controlled based on user types.

User Types

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

Access to deals is restricted by user types and permissions.

User Types

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

deals they have created and deals where they are identified as the Partner Contact.

- Partner Administrators - Employees in the partner organization who can view and update all deals owned by their organization.

Permissions

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

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

Access to referrals is restricted by user types and permissions.

User Types

- Vendor Users - Employees in the vendor organization who can view referrals that they created. They can also view referrals that they have access to, because they are on the partner's channel team. An example of a vendor user is a channel manager who is responsible for managing a set of partners. Another example of a vendor user is a sales representative managing an opportunity generated from a referral.

- Vendor Managers - Employees in the vendor organization who can view and update all referrals within their hierarchy.

- Vendor Administrators - Employees in the vendor organization who can perform system setup activities.

- Vendor Approvers - Employees in the vendor organization who can approve referrals. After they have performed the approval, they continue to have access to the referral.

- DQM Approvers - Employees in the vendor organization who can run DQM in order to link customer and contact information on the referral into the master customer record in the system.

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

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

Permissions

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

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

- Referral Compensation Approver - [PV_REF_COMP_APPROVER] - Vendors with this permission can approve compensation requests initiated by the Partner.

2

Dependencies and Integration Points

This chapter covers the following topics:

- Overview of Dependencies and Integration Points
- Prerequisites
- Optional Integrations

Overview of Dependencies and Integration Points

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 create 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 *Oracle Applications Multiple Organizations Implementation Guide*.

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.

Oracle Partner Management uses newly created and imported resources with the Channel Manager or Channel Rep role as members of the Channel team.

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 e-mail, fax, print schedules, e-mail notifications (or if you are using the features of e-mail 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 15-6 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, and is used to identify the country or countries to which the referral or deal benefit is applicable. It is also needed for opportunities and leads. Refer to Setting up Territories in Oracle Territory Management, page 15-3 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, transaction type Offer (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) 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 E-Business Suite Concepts* and *Oracle E-Business Suite Setup 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 Hub

Oracle Partner Management derives its product data using the product catalog provided by Product Hub. Product Hub 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 Product Hub User's 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*.

Setting Up MOAC

Multi-Org Access Control (MOAC) functionality enables users to access information across multiple operating units from a single responsibility. Previously, only one operating unit could be associated with a responsibility, so users had to change responsibilities to access different operating units.

For internal vendor users, the MOAC functionality is useful. However, partner users, who are not familiar with the vendor's internal organization, do not need Multi-Org Access Control. Therefore, vendors and partners require different setups.

Vendors who want to set up multi-org access for a responsibility should do the following:

1. Create an HR security profile with one or more operating units.
2. Assign the HR security profile to the profile option MO: Security Profile at the site or responsibility level.
3. Assign a default operating unit to the profile option MO: Default Operating Unit at the site, responsibility, or user level.

For partners, use the following setup:

1. Define the operating unit by using the MO: Operating Unit profile option at the responsibility level. If only one operating unit is supported for all partner users, set

the profile option at the site level.

2. Set the MO: Security Profile to null at all levels.

See the *Multi-Org Implementation Guide* for details.

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, Resource Manager
Deal Registration	Approvals Management, Data Quality Management, Sales, Territory Management, Workflow Builder
Opportunity Management	Quoting, Sales, Workflow Builder, Marketing, Deals, Referrals
Partner Dashboard	iStore, Marketing
Partner Funds	Approvals Management, Inventory, Trade Management, Workflow Builder
Partner Program Enrollment	Approvals Management, Payment, Order Management. Payment and Order Management are mandatory if a fee is charged for program enrollment.

Function or Flow	Oracle Application
Partner Programs	Advanced Pricing, Approvals Management, Content Manager, Contracts, Inventory, Marketing, Order Management, Workflow Builder, Business Intelligence Publisher
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 track customer discounts and to perform currency conversion. You can use advanced pricing's pricing engine to calculate the estimated program fee. A vendor user or channel manager can use advanced pricing to offer any discounts for any program when inviting a partner to the same program

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 Partner Management uses Order Management to calculate taxes

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 (TCA) 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 Payment

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

Oracle Payment 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 Payment also supports secure transactions.

Oracle Partner Management uses Oracle Payment to enable credit card payments for partner program enrollment. Oracle Payment stores and authorizes information, which is later used by Oracle Receivables to retrieve funds. Before being able to accept electronic credit card payments through Payment, a Payment 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. 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 and 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 partners participating in the campaign.

- **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 to process cash, check, or credit card payment methods 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 integrated with the Oracle Sales application. In order to enable partner functionality, you need to perform some implementation procedures to ensure that the opportunity pages appear and function correctly.

The Oracle Sales Opportunities page uses a feature called Flexible Layout for the External Salesteam section. With Flexible Layout, an object can be positioned on any tab on the page, rather than only on the Sales Team tab. See the *Oracle Application Framework Personalization Guide* for setups.

Oracle Sales is integrated into the following Oracle Partner Management flows:

- **Channel Manager Dashboard.** The Channel Manager Dashboard displays opportunity metrics for all the partners managed by the channel manager in the Key Metrics areas. In addition, the Partner Details page displays opportunity metrics for each partner.

- **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.** For opportunities that are assigned to partners, Oracle Partner Management integrates with the Sales pages to provide the detailed

information regarding the assignment history. Additionally, Oracle Partner Management provides the complete functionality to manage the partners that are working on the opportunity.

- **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 TeleSales

Oracle Partner Management is integrated with Oracle TeleSales. Oracle Partner Management exposes a subset of the partner management capabilities that are available in Oracle Sales.

For opportunities, the Telesales user can route the opportunity to a preferred partner, check routing status, and view routing history. The option to require channel manager approval during routing is also available in Oracle Telesales.

For leads, the TeleSales user can specify a preferred partner for the lead, and when the lead is converted to an opportunity, the preferred partner is transferred to the opportunity.

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.

- **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 the referral results in a sales order, the system automatically generates a claim based on the compensation parameters set up in the referral benefit.

- **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 using the Oracle Workflow Builder 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. To make changes to the seeded notifications or create new notifications, access Oracle Workflow Builder and the Oracle 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.

3

Setting Up Vendor Users

This chapter covers the following topics:

- Overview of Vendor Users
- 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
- Assigning a Channel Team for Partners

Overview of Vendor Users

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 Channel Manager or Channel Rep 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 Chapter 6, Creating the Partner Dashboard Site.

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 of the information about a partner as long as he is in the channel team of that partner.

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 3-11 for a list of the responsibilities that you might need to assign to a channel administrator.

Resource Roles

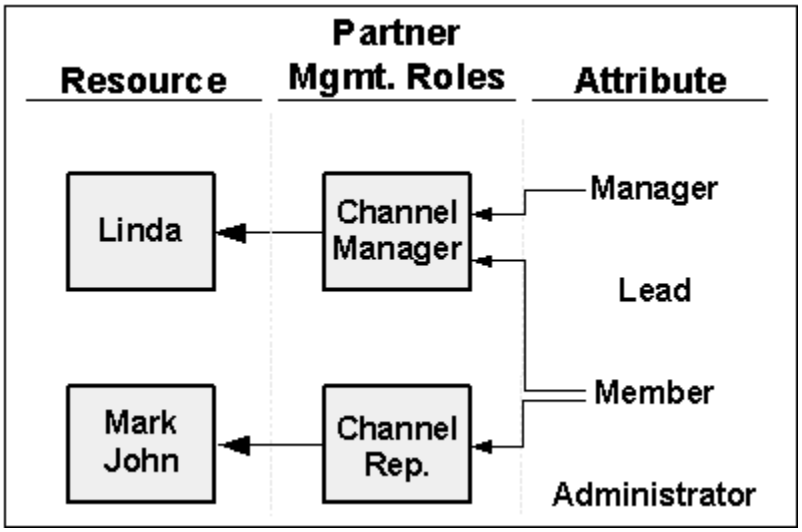
Oracle's CRM resource applications use resource roles to assign privileges to users and to control security.

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.

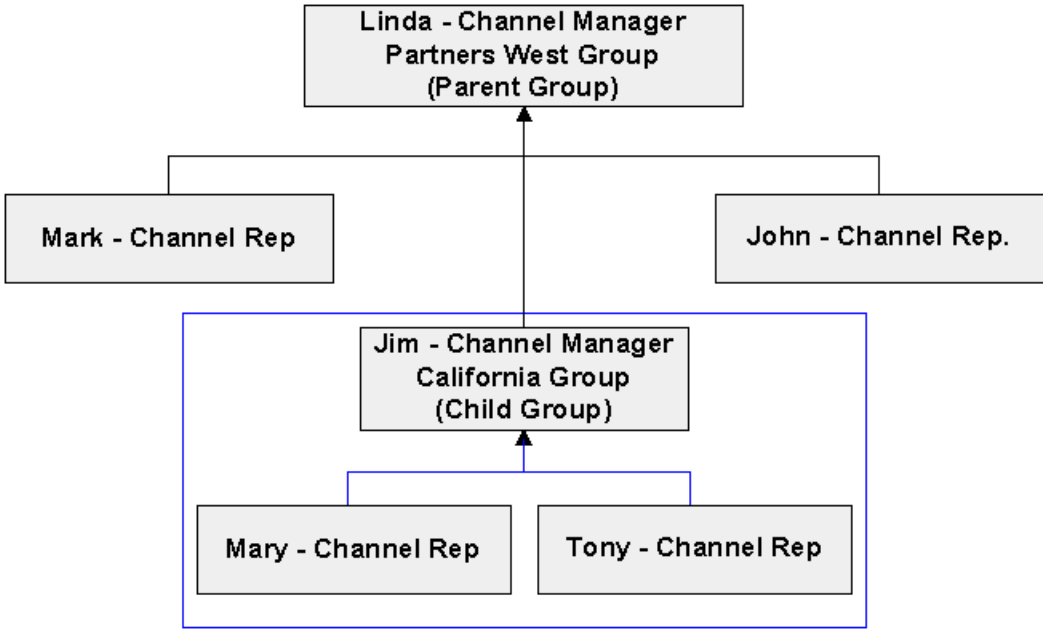
Each role is associated with one or more attributes. A role's attributes are defined when the role is created. The attributes assigned to a role help to further define the role. There are four attributes: Member, Lead, Administrator, and Manager.

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:

- PV_CHANNEL_MANAGER - contains the PV_INVITE_NEW_PARTNERS permission.
- PV_CHANNEL_ADMIN_UPDATE - contains the PV_UPDATE_ALL_PARTNERS permission
- PV_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_DEAL_SUPERUSER	Vendor users with this permission have view/update access to all deal registrations.
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_PARTNER_UPDATE_PROFILE_ATTRIBUTE	Allows a user to update partner profile attributes. A user with this permission can update seeded and custom partner profile attributes.
PV_PARTNER_VIEW_PROFILE_ATTRIBUTE	Allows a user to view partner profile attributes. A user with this permission can only view seeded and custom partner profile attributes.
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_REFERRAL_SUPERUSER	Vendor users with this permission have view/update access to all referrals.

Permission	Description
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.

For more information on permissions related to partner attributes, see Setting Up Attribute Security, page 7-18.

Setting Up Multi-Org Access Control for Vendor Users

Multi-org access control (MOAC) allows a user to access multiple operating units from a single responsibility. With MOAC, you do not have to change responsibilities in order to access different operating units in the vendor organization. MOAC is not used with partners, because they are outside the vendor organization.

When setting up MOAC for vendor users, the Maintenance List program needs to be run to apply the MOAC setups to the system. Also, when creating a Global Security Profile, be sure to select the Exclude Business Group option.

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	*Using Oracle HRMS - The Fundamentals*
Creating a User and Assigning Responsibilities	
Importing the Employee into CRM	*Oracle Common Application Components Implementation Guide*
Assigning Resource Roles and Resource Groups	
Assigning Permissions-Based Roles	

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 employe.
- **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. Click the User Maintenance link. 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 been 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, to address Oracle Partner Management issues. 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 Business Analyst	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 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 transactions.
Content Manager 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.

Responsibility	Description
Contracts Terms Library Administrator	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.
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. This responsibility also can be used to approve new partner user registrations.
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.
Inventory	Allows a user to create new inventory items. When automatic creation of inventory items is disabled, partner program inventory items must be set up directly in the Oracle Inventory application.
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.

Responsibility	Description
Oracle Payables	Allows a user to enable or disable the CVV2 and statement address verification credit card security features.
Oracle Pricing Manager	Allows a user to add items to price lists. When automatic creation of inventory items is disabled, partner program inventory items must be added to one or more price lists, and pricing information must be provided.
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.
PRM Concurrent Requests	Provides a user with access to the concurrent requests used by Oracle Partner Management.
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.
Territory Management	Allows a user to set up Partner Management territories and associate resource groups with the territories.
Trading Community Manager	Allows a user to access the Oracle Data Quality Management (DQM) application. DQM is used by special pricing, 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.

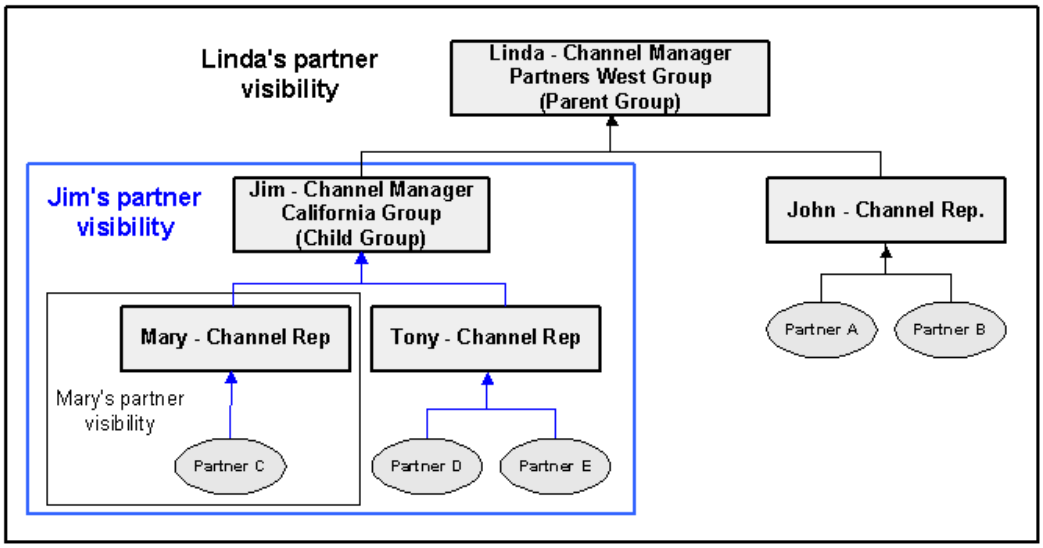
Responsibility	Description
Workflow Administrator Web Applications	Allows a user access to Oracle Workflow Builder. Oracle Workflow Builder is used to send notifications for deal registration, partner fund, special pricing, and lead referral requests. Oracle Workflow Builder requires the Oracle database.
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. This responsibility is also used to approve contract templates and clauses.

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.

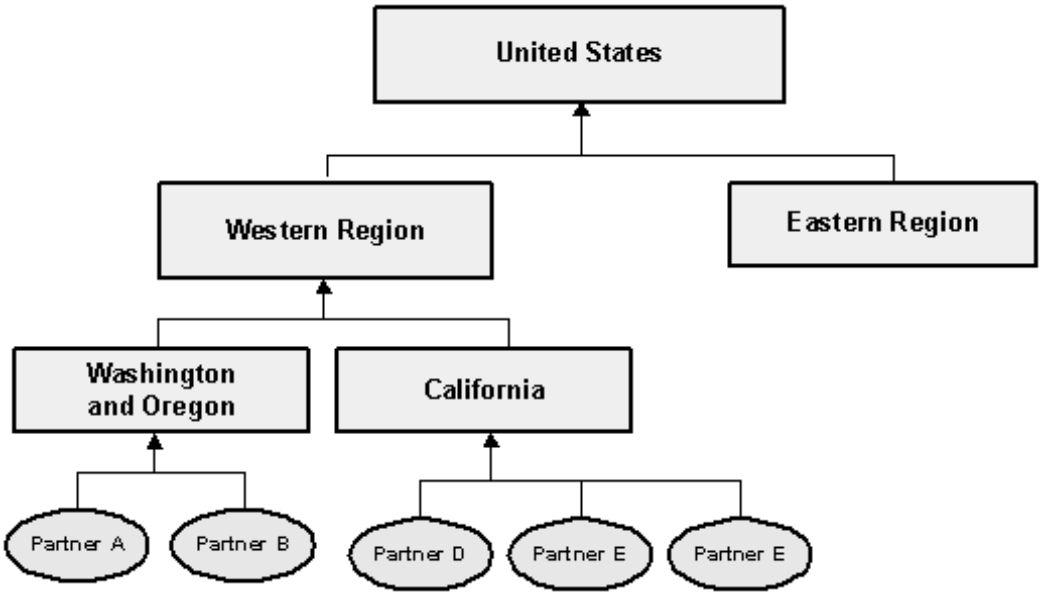
Steps:

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. Make sure Partners Management is selected.
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).

Assigning a Channel Team for Partners

Oracle Partner Management uses a combination of Oracle Territory Manager and Oracle Resource Manager functionality to automatically build the channel team for partners. A territory hierarchy for Partner Management usage is created using Oracle Territory Manager. For each territory in the hierarchy, you define one or more partner-related transaction matching attributes. For example, you can create a California territory whose matching attribute (STATE = "CA") specifies that the identifying address of the partner should be in California. Additionally, you also can associate one or more resources with each territory. A concurrent program that runs periodically matches each partner to an appropriate territory based on the transaction matching attribute, and adds the resources associated with that territory to the channel team of the partner.

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 15-3.

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.

4

Setting Up the Channel Manager Dashboard

This chapter covers the following topics:

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

Overview of Channel Manager Dashboard

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. This chapter describes 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 Chapter 3, Setting Up Vendor Users.

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 15-3 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 manually added to a partner's channel team, the territory assignment program cannot remove it.

- **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 channel team.
  - A user with the channel manager role sees information about all partners managed by his direct and indirect channel team members that have a Channel Manager or Channel Rep role.
  - 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.

You must run two concurrent requests to update and populate the graphs and KPIs on the Channel Manager Dashboard:

- PV - Refresh attribute text table
- PV - Refresh Partner Trend Values

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 Create and Invite Partner button on his Partners page. This permission can be assigned to users with any role.

- **PV: Partner Update Profile Attribute permission:** A user with this permission can edit seeded and custom partner profile attributes displayed on the Partners page.

- **PV: Partner View Profile Attribute permission:** A user with this permission can only view seeded and custom profile attributes of partners on the Partners page.

For more information on permissions related to attributes, see Setting Up Attribute Security, page 7-18.

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.

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.

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 create partners and invite them to join a program.
Vendor Employee - Channel Manager	Y	Y	N/A	N	Can view and update any partners in the system. Cannot create partners and invite them 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	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 create partners and invite them 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 create partners and invite them to join a program.
Vendor Employee - Channel Manager	Y	Y	N/A	Y	Can view and update any partners in the system. Can create partners and invite them 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	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 create partners and invite them to join a 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 create partners and invite them to join a program.
Vendor Employee - Channel Rep	N	Y	N/A	N	Can view and update any partners in the system. Cannot create partners and invite them 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 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 create partners and invite them 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 create partners and invite them to join a program.
Vendor Employee - Channel Rep	N	Y	N/A	Y	Can view and update any partners in the system. Can create partners and invite them to join a program.
Vendor Employee - Channel Rep	N	N	Y	Y	Can view any partners in the system. Can update only those partners that are managed by the logged in user. Cannot create partners and invite them 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 - Any other role	Y	N	N	N/A	Can view partners that are managed by the channel managers or channel representatives that report to the logged in user. The logged in user cannot update partner details. The logged in user cannot create partners and invite them to join a program.
Distributor - Channel Manager	Y	N/A	N/A	N	Can view only the partners that are managed by the logged in user and as well as the partners that are managed by the channel managers or channel representatives reporting to the logged in user. Cannot create partners and invite them 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
Distributor - Channel Manager	Y	N/A	N/A	Y	Can view only the partners that are managed by the logged in user and as well as the partners that are managed by the channel managers or channel representatives reporting to the logged in user. Can create partners and invite them to join a program.
Distributor - Channel Rep	N	N/A	N/A	N	Can view only the partners that are managed by the logged in user. Cannot create partners and invite them to join a program.
Distributor - Channel Rep	N	N/A	N/A	Y	Can view only the partners that are managed by the logged in user. Can create partners and invite them 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 managing partners, Oracle Partner Management has seeded the following business event:

- oracle.apps.pv.partner.Profile.updateStatus: This event is raised every time the partner status changes

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

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 through a user interface. You do not have to change the code.

How Event Updates Work

As an example, this section discusses how a subscription works with the oracle.apps.ar.hz.Organization business event. The other subscriptions work in much the same way, except that some of the values change, for example, the Event Filter, Role

Function, and Description. In this particular example, 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 Phase value indicates the immediacy of response needed for the subscription. Any value less than 100 in that field means Immediate. A value more than 100 indicates that the notification can be Deferred, and sent out the next time that the scheduled concurrent request runs. Some business events, such as a partner self-registering, may require immediate attention, which is when a phase number below 100, such as 50 in the example, is used.

The following table lists the subscription setup fields for a business event, using the organization business event as an example.

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	-

Column Name	Value
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.

Partner Subscriptions

The following are the partner subscriptions used in Oracle Partner Management. The same format is used for subscriptions as is shown in the previous example; the specific details of four fields changes for each different subscription. Those fields are shown below.

Contact Point

Event Filter: oracle.apps.ar.hz.ContactPoint.update

Rule Function: pv_tap_bes_pkg.contactpoint_update_post

Phase: Immediate

Description: Create a changed partner record in the PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an update of the organization contact point related partner qualifiers, resulting in redefinition of the Channel team for that Partner Organization.

Location

Event Filter: oracle.apps.ar.hz.Location.update

Rule Function: pv_User_Resp_Pvt.manage_resp_on_address_change

Phase: Deferred

Description: Manage user responsibility when the location is updated.

Location/Partner Qualifiers

Event Filter: oracle.apps.ar.hz.Location.update

Rule Function: pv_tap_bes_pkg.location_update_post

Phase: Immediate

Description: Create a changed partner record in the PV_TAP_BATCH_CHG_PARTNERS table whenever there is an update of organization location-related partner qualifiers, resulting in redefinition of the Channel team for that Partner Organization.

Organization

Event Filter: oracle.apps.ar.hz.Organization.update

Rule Function: pv_tap_bes_pkg.organization_update_post

Phase: Immediate

Description: Create a changed partner record in the PV_TAP_BATCH_CHG_PARTNERS table whenever there is an update in organization-related partner qualifiers, resulting in redefinition of the Channel team for that Partner Organization.

Party Site

Event Filter: oracle.apps.ar.hz.PartySite.update

Rule Function: Pv_User_Resp_Pvt.manage_resp_on_address_change

Phase: Deferred

Description: Manage the user responsibility when the location is updated.

Party Site Update

Event Filter: oracle.apps.ar.hz.PartySite.update

Rule Function: pv_tap_bes_pkg.partysite_update_post

Phase: Immediate

Description: Create a changed partner record in PV_TAP_BATCH_CHG_PARTNERS table, whenever there is an update to organization party site related partner qualifiers, resulting in redefinition of the Channel team for that Partner Organization.

Create Relationship

Event Filter: oracle.apps.ar.hz.Relationship.create

Rule Function: Pv_ptr_member_type_pvt.terminate_partner

Phase: Deferred

Description: This is to used to update PV tables with the correct member type when the global-subsidiary relationship is activated outside the PVapplication.

Update Relationship

Event Filter: oracle.apps.ar.hz.Relationship.update

Rule Function: Pv_ptr_member_type_pvt.terminate_partner

Phase: Deferred

Description: This is to update PV tables with correct member type and terminate active partner program memberships when the global-subsidiary relationship is inactivated outside the PV application.

Approve UT Event

Event Filter: oracle.apps.jtf.um.approveUTEvent

Rule Function: pv_user_mgmt_pvt.post_approval

Phase: Immediate

Description: Create user resource and responsibilities upon user registration approval

Profile Update Status

Event Filter: oracle.apps.pv.partner.Profile.updateStatus

Rule Function: PV_PG_MEMBERSHIPS_PVT.TERMINATE_PTR_MEMBERSHIPS

Phase: Deferred

Description: Terminate partner memberships upon partner status change

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 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, Concurrent Programs, for information about setting up and running the programs.

5

Setting up Partners and Partner Users

This chapter covers the following topics:

- Overview of Partners and Partner Users
- Creating Partner Users
- VAD Users
- Enabling User Types
- Remove Access to Partner Management Functionality

Overview of Partners and Partner Users

Partners are organizations with which vendors have a business relationship. Every partner organization is a distinct legal entity with its own challenges, market pressures, customers, and intellectual capital. In a partner relationship, vendors and partners work together to win the customer over with a compelling product or service. The significant difference is that the partner is not permanently tied to a vendor's product line. Partners help to close businesses by selling a vendor's products and assisting intercompany process before, during, and after the sale.

Partners provide industry expertise or add value to products and services. Types of partners include prospects, end users, original equipment manufacturers, resellers, and value added distributors (VADs). Oracle Partner Management focuses on connecting vendors with indirect channels to help partners successfully sell the vendors' products.

In Oracle Partner Management, there are four ways to create a partner:

- A vendor user with the appropriate privileges can manually create a partner organization.
- A partner can register using a self-service registration process.
- A vendor can convert an existing customer to a partner.

- A value added distributor (VAD) can create a new partner that they want to manage.

When a new partner self-registers or is manually created, Oracle Partner Management uses the basic information to set up the partner profile. When an existing customer is converted to a partner, the organization already exists in the system, so you do not need to re-enter this information.

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; he then receives a notification. The partner employee registered during the partner organization registration process is always registered as a primary user. The primary user is the administrative user. Default roles and responsibilities are granted to a partner user upon the completion of the registration flow.

When a partner registers, the following are set up in Trading Community Architecture (TCA):

- A party record is created for the organization
- A party record is created for the contact
- A partner of relationship is created between the partner organization and the vendor
- An Employee-of relationship is created between the partner contact and the partner organization

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 Managers and Channel Reps who manage and work with the partner.

- For directly managed partners, Channel Managers are vendor employees.
- For indirectly managed partners, Channel Managers are VAD employees or vendor employees or both.

The seeded event 'oracle.apps.pv.partner.Profile.updateStatus' is raised whenever the PV_PARTNER_PROFILES.status is updated.

When an existing customer of Oracle Partner Management upgrades to release 12.0

from a prior release, it is essential to run the PV: Partner Type Migration concurrent program as one of the post-installation steps. If you do not run this concurrent program, existing partners will have a blank Primary Partner Type. Also, these partners will not be returned as part of any search result set.

Creating Partner Users

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

Oracle Partner Management allows vendor users to create pricing for partner programs in various price lists, and integrates with Oracle Advanced Pricing to create and manage these lists. Advanced Pricing uses the QP: Security Control to control price list security by operating unit.

The default currency used by a Partner is set in the partner's responsibility. It is not changeable by the partner after it has been set. This prevents partners from frequently adjusting the default currency in order to take advantage of any rising or falling currency exchange rates.

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 8-13.

- **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 the *Oracle iStore Implementation Guide*.

User 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. The role is assigned when a channel manager registers partner users and a VAD registers indirectly managed partners and users.

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. Also the role is assigned when a channel manager registers partner users and a VAD registers indirectly managed partners and users:

- **PV_PARTNER_PRIMARY_USER:** By default, this role is assigned to the partner employee who first registers his organization as a partner, and also whenever a partner user is registered using the Primary User type. A user with this role is referred to as the Primary User, provided that the role has not been customized or still has 'PV_PARTNER_USER' and 'IBE_INT_PRIMARY_USER' permissions even after customization. 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 registered using the Primary User type and Business User type. 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. This can also be done by a vendor user that has access to the CRM HTML Administrator responsibility.

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.

Permission Name	Description
PV_MY_CONTACT_PROFILE	Provides access to the partner's profile. Navigate via the Profile icon > My Profile > Personal Information > Profile tab.
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.
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.

Permission Name	Description
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_PARTNER_BUSINESS_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_MEMBERSHIPS	Provides access to view partner memberships. 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_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 across the application.
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.

Permission	Role	Description
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 it may appear in some seeded user roles, those roles are non-functional.
IBE_INT_ORG_ADDRESS_BOOK	PV_PARTNER_PRIMARY_USER PV_PARTNER_BUSINESS_USER	Permission to view company address book in the Company Profile screens.
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 are 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.

Permission	Role	Description
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 create new and update existing organization contacts and users in the User Management screens.
IBE_INT_ASSIGN_ACCOUNTS	PV_PARTNER_PRIMARY_USER	Gives users permission to assign accounts in the User Management screens.
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 or Channel

Representative role, which provides them with visibility into partner information. In addition, the following permission can be assigned to VAD users to give them additional partner management capabilities:

- **PV: Invite New Partners permission:** A user with this permission can create a partner and invite it to a program. The user sees the Create and Invite Partner button on his Partners page.

By default, a VAD contact does not have access to the My Managed Partners bin. To give a VAD contact access to this information, do the following:

1. Give the user the Channel Manager resource role (assigned at both the Role and the Group tab).
2. Give the user the PV_CHANNEL_MANAGER permissions based role in order to give access to the invite new partner link.

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. Log in 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*.

Remove Access to Partner Management Functionality

To remove access to partner management functionality, do the following in the specified sequence:

1. 1. Run the PV - Assign/Revoke user responsibilities concurrent program with action parameter value as Revoke to revoke all the Oracle Partner Management responsibilities automatically assigned by the system. If any responsibilities are set manually, they need to be revoked manually.

2. Revoke any permission-based roles that give access to the PV_PARTNER_USER permission.

6

Creating the Partner Dashboard Site

This chapter covers the following topics:

- Overview of the Partner Dashboard
- Setting Up the Partner Dashboard
- Creating the Partner Dashboard Web Pages
- Giving Partners Access to the Library
- Profile Options

Overview of the Partner Dashboard

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

- 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. Partner organizations and users can created or registered from internal facing or Channel Manager user interface. This chapter

describes how partner users are set up and the roles and permissions that they are assigned.

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

The Partner Dashboard is configured and managed through the Oracle iStore application.

The site administrator (manager) creates sites, including the Partner Dashboard, using the Oracle iStore Site Administration user interface. From this interface, the site administrator creates a catalog section hierarchy for the site with the appropriate templates, text, images, and hyperlinks, and then sets up the Partner Dashboard as a live specialty site that is linked to a partner responsibility and the catalog root section.

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 with the application 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 that 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 provides 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 look and feel 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 (New Offered Opportunities bin, 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 Enroll programs, Upgrade Programs, and Renewal Programs bins.

For example,

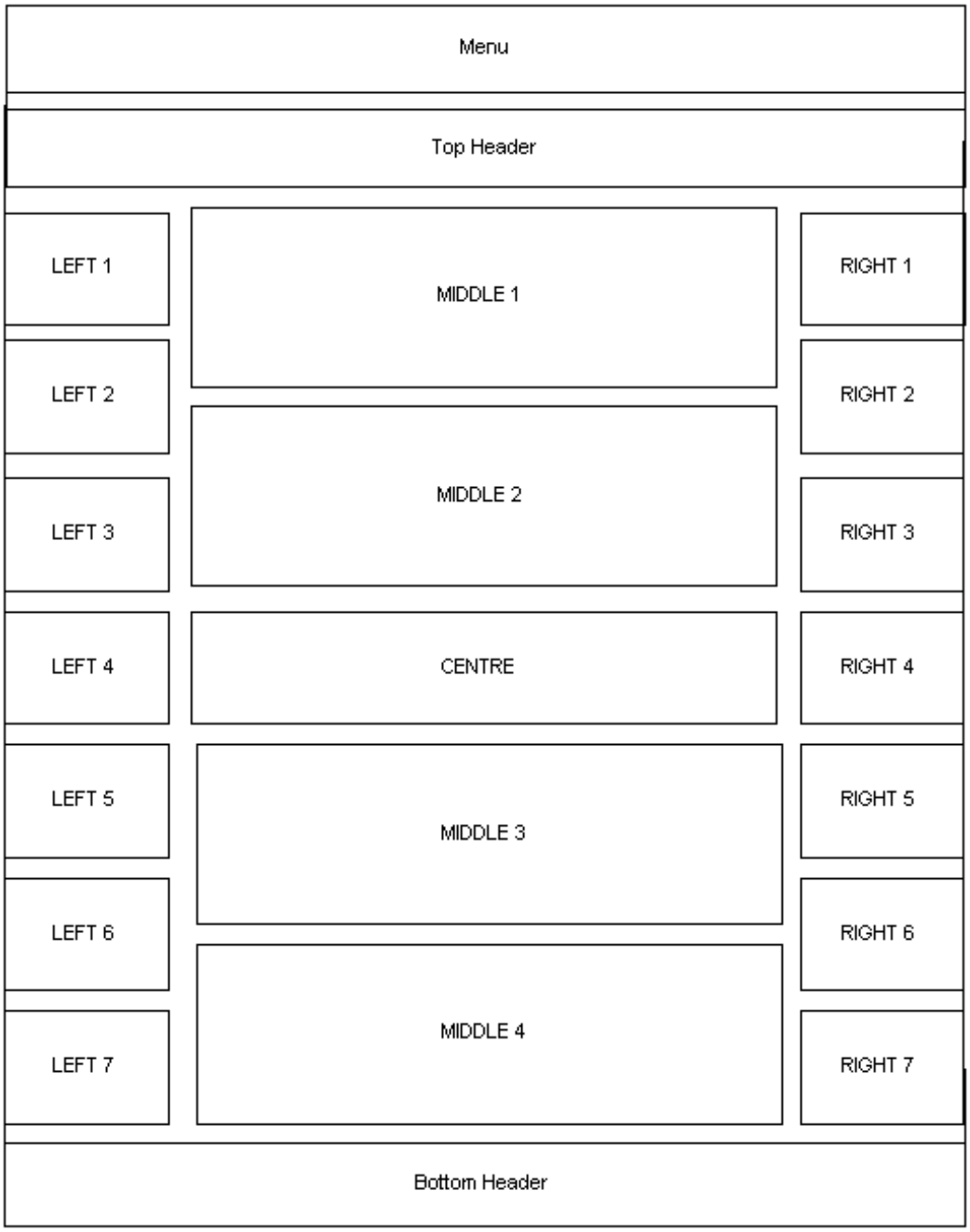
- One location delivers the links for navigation to the transactional system.
- Another location delivers messages for partners via integration with Oracle E-merchandising.
- Another location enables vendors to deliver content by leveraging Oracle Content Management (OCM) and Oracle iStore (Section Hierarchy 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 logs into the dashboard, he sees bins such as Quick Links bin, Renew Programs bin, Upgrade Programs bin, and New Offered Opportunities Bin (if the vendor has mapped them to one of the locations in the layout template of the partner dashboard section). Each bin is defined as a template so that it can be mapped to any location when selecting configurable layout. Some bin jsps are provided to customers so that they can map bin jsps to any template when selecting fixed layout.

The following bin templates are shipped with the application. 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
- Enroll Programs bin
- New Offered 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.** Based on responsibility mappings setup, partner users with different roles can get access to different responsibilities. This is how a user role dictates how different quick links show up in the quick links bin.

Renew Programs Bin

This bin displays programs that are up for renewal. The bin is available only to partner administrators to help them review 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 in upgrading their memberships. The partner administrator can review programs and start the enrollment process by clicking the Program Name link.

Enroll Programs Bin

This bin provides the ability to view and finish the enrollment process for any new programs that the partner is eligible to enroll in and any programs with incomplete enrollments. The bin is displayed only to the partner administrator. The link on the program name navigates to the program overview page. If the user clicks the Enroll button, she can enter the enrollment flow for enrolling in that program.

New Offered 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 PV_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 the *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 the *Oracle iStore Implementation Guide*.

Partner Group Bin

Oracle iStore seeds a bin template which displays sites associated to the Partners group. To display this bin, map the logical template, PARTNER_GROUP_BIN_IBEWC, to the bin layout component of your choice for the default layout template or map the 'Partner Group Bin' template to any location for the configurable layout.

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
Enroll Programs Bin	pvxCPvdPrgmNewBin.jsp
Renew Programs Bin	pvxCPvdPrgmRenewBin.jsp
Upgrade Programs Bin	pvxCPvdPrgmUpgradeBin.jsp
New Offered Opportunities Bin	pvxCPvdMyOffrdOppBin.jsp
Manage My Partner Bin	pvxCPvdMngPrtnrBin.jsp
Store Group Bin	ibeCAcdGroupSiteBin.jsp
Marketing Postings Bin	amsWebPlacement.jsp
Welcome Bin	ibeCAcdWelcome.jsp

The Quick Links and Marketing Postings bin are part of Oracle iStore. The Renewals, Upgrades, Enroll Programs and New Offered 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:

- 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 have determined the content for the partner dashboard page, 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.*

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

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 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, for a complete list of profile options for the Partner Dashboard.

7

Setting Up Partner Profile Attributes

This chapter covers the following topics:

- Overview of Partner Profile Attributes
- Partner Profile Attributes
- Working with Attributes
- Setting Up Custom Attributes

Overview of Partner Profile Attributes

Oracle Partner Management provides an extensible attribute framework to manually or automatically capture any kind of information about your partners. This information is presented in the performance and profile tab on the partner detail page. Partner profile attributes that track a partner's performance, such as Sales YTD and Opportunities Won, are displayed in the performance tab.

Performance profiles are numeric calculated values, based on partner transactions, which are refreshed at user-defined intervals. Non-performance related profiles such as partner certification, partner industry, and partner annual revenue are displayed in the profile tab. These profile values are either entered manually--directly or through a program enrollment questionnaire--or derived based on partner transactions.

Partner profiles are also accessible to the partner user from the partner dashboard. Both vendor and partner users can update the profile information if assigned update permission. For more information on attribute security, see Setting Up Attribute Security, page 7-18. The application maintains a history of the changes for profiles that are updated manually including changes made to partner contact profiles. In addition to partner profile attributes, the extensible attribute framework is also used to manually capture partner contact profiles. This information is presented in the Profile tab on the Partner Contact Detail page for the vendor user.

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 7-2. In the application, a channel administrator 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 7-12. A channel administrator can also create customized attributes, if needed, to meet her organization's needs. Refer to Setting up Custom Attributes, page 7-23 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. The Channel Administrator can view details about seeded attributes, and can also define the order in which the attributes appear on the profile.

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. Performance attributes allow a vendor to track a partner's performance over a period of time and are captured at a monthly level. These monthly values can be further aggregated to an annual value for some performance attributes. Cumulative performance attributes are additive, meaning the measurements taken at the monthly levels can be summed up to calculate the yearly figure. For example, the attribute Opportunities Won YTD tracks the total number of indirect opportunities a partner has won during the current fiscal year and is the sum of Opportunities Won for each month for that fiscal year.

Noncumulative attributes are point in time values, providing a snapshot for a specific partner performance profile attribute at the time the attribute was refreshed. These monthly level values cannot be summed up to calculate the yearly figure. For example, the attribute Open Opportunities Count lists the number of opportunities that are open currently for a partner or partners. You cannot sum up the Open Opportunities Count for each month to derive the annual Open Opportunities Count, because most likely an open opportunity in a prior month will have closed in the current month.

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_values table. A majority of these partner performance attributes are aggregated from the Partner Trend Attributes, so make sure that the Partner trend attributes are updated prior to running this concurrent program. Refer to the Performance Attribute Refresh Dependencies 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.

  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, the employee's role in a resource group, or due to permissions). 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	Profile Tab
Allow Partner to Edit Opportunities	A vendor can control partner opportunity access on a partner-by-partner basis			
Capacity Rating	Partner's capacity rating (Implementation specific)	General	Single-Select	Profile 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	Profile Tab
Customer Annual Revenue	Annual revenue of the partner as stored in TCA table	General	Currency	Profile 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	Count	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 Accepted YTD Count	Total number of deals accepted based on deal created during the current fiscal year	Sales	Count	Performance Tab, Key Metrics Bin
Deals Close Rate	Deals Closed Count/Deals Accepted Count	Sales	Percentage	Performance Tab
Deals 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
Functional Expertise	Partner expertise with regards to vendor product or service offering	General	Multi-Select	Profile Tab
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	Profile Tab, Key Metrics Bin
Geographic Coverage	Partner's Geographic Coverage (Implementation specific)	General	Multi-Select	Profile 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	Profile Tab
Last Order Date	Date of the last order where partner is the 'Sold to' party base on last ordered date	Sales	Date	Profile 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 divided by the number of opportunities offered to partner	Sales	Percentage	Performance Tab, Key Metrics Bin
Opportunity Close Rate	Number of opportunities won by the partner divided by the number of opportunities accepted by the partner	Sales	Percentage	Performance Tab, Key Metrics Bin
Partner Enrollment Date	Partner enrollment date	General	Date	Profile Tab
Partner Level	Partner level (Implementation specific)	General	Single-Select	Profile Tab
Partner Member Type	Partner member type (Standard, Global, Subsidiary)	General	Single-Select	Profile Tab
Partner Name	Partner Name	General	String	Profile Tab
Partner Type	Partner type (End user, Original Equipment Manufacturer, Prospect, Distributor, Reseller). Users can define additional types	General	Single-Select	Profile Tab
Partnership Activity	Partnership Activity (Implementation specific)	General	Multi-Select	Profile Tab
Product Categories Available in Special Pricing	Product categories that a partner is authorized to submit special pricing requests for (Implementation specific)	General	Multi-Select	Profile 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	Multi-Select	Profile 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	Multi-Select	Profile 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
State	States in which the partner has a presence	General	Multi-Select	Profile 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.

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. • 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 7-18 for more information on lists of values and attributes. • Text box. Data is entered by 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 7-17 for additional information.
Category	The functional category of the attribute. Refer to Setting up Attribute Categories, page 7-17for additional information.

Column	Description
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.
Other Attribute Information	Enables you to assign one or more roles to an attribute
Active	The attribute is enabled and is displayed in the respective profile pages.
Update	Select this icon to navigate to the attribute edit page.
Remove	Select to remove an attribute. You can remove only attributes for which no data has been collected. Additionally, seeded attributes cannot be removed; this icon is grayed out for them.

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 7-18 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_CLASSIFICATION_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
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

Attribute	Display Style	List of Values Source	Enabled For
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_METHODOLOGY_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 ongoing administrative tasks:

- Setting up Attribute Categories
- Setting up Attribute Display Styles
- Setting up an Internal List of Values
- Setting up Attribute Security
- Setting up Refresh Frequency
- Refreshing Attribute Values with Concurrent Programs
- Reordering Attributes
- Migrating Partner Type Values

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 the Profile and Performance 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 7-23.

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 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 Attribute Security

Partner attributes enable the channel manager to search for partners and track partner performance. These can be seeded or custom attributes that the channel administrator creates. To ensure the confidentiality and security of partner attributes, set the PV: Enable Profile Attribute Security profile option to Yes at the site level. To control whether vendor or partner users can view or update partner attributes, assign the appropriate permissions to user roles and roles to attributes. If you set the profile option to No, all roles can view and update attributes irrespective of the permissions assigned to the roles.

The permissions that you can assign to roles are PV_PARTNER_UPDATE_PROFILE_ATTRIBUTE and PV_PARTNER_VIEW_PROFILE_ATTRIBUTE. User roles can be existing or newly created. These roles include channel managers, channel representatives, and primary and secondary partner users.

You assign roles to attributes in the Attribute Details page. If you select to assign ALL ROLES to a partner attribute, both vendor and partner users can view and update the attribute based on the permission assigned to their role. Otherwise only the role assigned to the attribute can view or update the attribute based on the permission assigned to the role.

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

Partner Group Measure	Depends on Partner Measure	Depends on Partner Trend Measure
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
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

Partner Group Measure	Depends on Partner Measure	Depends on Partner Trend Measure
--	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. **Note:** Data from some earlier releases of Oracle Partner Management may contain a primary key that overlaps the next value in the sequence. This could cause errors and prevent the partner program creation process from completing properly. To correct this, run the Full Refresh of the PV: Refresh Attribute Text Table concurrent program, which essentially replaces all of the primary key ID's in the table.

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.

Parameter	Description
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 has 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.

Reordering Attributes

Reordering of attributes can be done only from the Channel Administrator responsibility. The Attribute overview page is the starting point for the attributes reordering process. Reordering is done at a category level; therefore, a Channel Administrator must select a specific category prior to initiating the reordering process.

Migrating Partner Type Values

Currently. a partner can be assigned one partner type only. If you are upgrading from an earlier Oracle Partner Management release you need to perform some administrative functions to successfully migrate your partner type data:

Populate the PV_PARTNER_TYPE_RANKING lookup table with a numerical ranking for each existing partner type. The table is seeded with some partner types and ranking data; and vendors can add to and modify the seeded values. The PV: Partner Type Migration concurrent request uses this lookup table to assign a single type to each partner by evaluating all of the partner's existing types and selecting the top-ranked type (the type with the lowest value).

For example, if a partner is currently assigned both Reseller and OEM partner types, and the value assigned to Reseller is lower than that assigned to OEM, then the partner's new type will be Reseller. Vendors must provide a ranking for each partner type except for the VAD type. The VAD is always considered the top-ranked partner type, regardless of the ranking specified by the vendor. See Partner Profile Attribute lookups, page B-8 for more information.

After establishing the partner type rankings, run the PV: Partner Type Migration concurrent program to assign the new rankings to existing partners. The program can be run in Evaluation or Execution mode. See Concurrent Programs for Partner Profile Attributes, page C-17 for more information. The concurrent program generates a log file that provides information about the migration, including the original partner types and the new partner type for each partner.

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 e-mail 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 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.
- **Partner Search:** Enabling an attribute for matching services provides potential customers with an advanced search tool that they can use to locate partners that meet certain criteria.
- **Locator:** Enabling an attribute for matching services makes it available in the Partner Locator advanced search.

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

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

Attribute Type	Display Style	Additional Information for Attribute
	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 populate 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= ?
```

8

Setting Up Partner Programs

This chapter covers the following topics:

- Overview of Partner Programs
- Setting Up Program Types
- Setting Up Programs in Oracle Inventory
- Defining the Price for Program Inventory Items
- 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
- Trading Community Architecture Events and Subscriptions
- Profile Options
- Lookups
- Concurrent Programs

Overview of Partner Programs

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 discounts for newly purchased inventory or to move existing inventory.
- Fund Requests - A partner requests funds to carry out certain marketing activities.
- Opportunity Management - A partner is made 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 ongoing administration, a channel administrator is responsible for the following tasks:

- Setting up program types and specifying program approvers
- Creating inventory items for a program that has a membership fee associated with it
- Specifying price lists to be used for programs
- Setting up payment methods based on a partner's geography
- 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

After 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 Approvals 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 Partner tab > Programs > Program Type, then click Create Type to access the Create Partner Program Type page.

Prerequisites

None.

Notes

- **Partner Types:** The partner types 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 Order Management; for an order to be created, the partner program must be set up as an inventory item in Oracle Inventory.

To automatically create inventory items for partner programs that have a membership fee (default behavior), for To set up partner programs in Oracle Inventory, the program administrator must complete the following:

- Specify the master 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.

  Specify the unit of measure (UOM code) for the inventory item. Set the PV: Default UOM Code profile option value at the site level.

Disabling Autocreation of Inventory Items

You can disable automatic creation of inventory items by setting the profile option PV: Enable Auto Creation of Inventory Items to No at the Site level. If automatic creation is disabled, vendors must manually associate a program with an inventory item for fee-based programs.

To do this, you must search for partner program inventory items by using the Inventory Item list of values. Because an organization can have a large number of items stored, and only some of the items are associated with partner programs, the inventory item LOV uses two profile options and inventory item attributes to identify potential partner program inventory items. These two profile options are used to filter out inventory items in the inventory LOV:

- PV: Default UOM code
- AMS: Item Validation Master Organization

Information on these two profile options appears in the next two sections.

The inventory LOV uses certain attributes to identify an inventory item as a potential partner program. The following values must be provided when creating a partner

program as an inventory item:

- Shippable = No
- Customer ordered = Yes
- Customer orders enabled = Yes
- Invoicable item = Yes
- Invoice enabled = Yes
- Orderable on Web = No

When automatic creation of inventory items is disabled, because the partner program pricing is associated with the partner program inventory item, the program pricing must be set up in the Oracle Advanced Pricing application. When automatic creation is disabled, you can associate a partner program with an inventory item even without pricing set, but you cannot activate it until pricing is set up for the associated inventory item.

Earlier an inventory item was created automatically for each partner program. However, if a partner program does not have a fee, creating the inventory item is unnecessary, because the item is not orderable.

If a partner program is active and has enrollments, you cannot change the association between the inventory item and the partner program.

In order for a partner to successfully enroll in a program with a fee, the following must be performed:

1. Choose responsibility Oracle Pricing Manager > Setup > Event Phases.
2. Query for Sequence "0" and then click on the row for Batch Processing.
3. Make sure the column User Search Flag is set to "Yes".

If your enterprise has more than one operating unit, be sure that when you create an inventory item for a partner program, you make it available for all inventory organizations.

Identifying the Master Inventory Organization

Oracle Partner Management uses the AMS: Item Validation Master Organization profile option to determine the master inventory organization in which partner programs will be stored as items. The profile setting should be the name of the organization and set at the Site level. If this profile is not set, then the user will see an error when accessing the inventory LOV if automatic creation of inventory item is disabled or when creating a program with fee if automatic creation of inventory item is enabled.

Setting a Default Unit of Measure

You must set the unit of measure for the inventory item by using the profile option PV: Default UOM Code at the Site level. This ensures that the unit of measure matches up with your inventory application. You should not change the UOM after implementation, because the UOM identifies the inventory item as a part of a partner program. If the UOM is changed, then older partner-related inventory items will no longer appear in the LOV. You must set the default UOM whether the inventory items are created automatically or manually.

The PV: Default UOM Code profile options is not shipped with any value, but you must set it to any UOM currently available in your inventory program or the application will create an error message.

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. This information creates a partner program inventory item when automatic creation of inventory item is enabled. 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 or follow 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 or following segments and enter the code for the program. Then, you enter the value PV_PRGM_FLEX_CODE, which should be unique. This segment will be populated with a unique value to make the concatenation of segments unique for each inventory item that gets created.

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_PRGM_FLEX_CODE, where the PR_PRGM_FLEX_CODE concatenates the first five letters of the partner program's name with the program_id value, which is populated by the system 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 "123" is the program_id assigned by the system.

Defining the Price for Program Inventory Items

Partners might be charged to enroll into a partner program. Thus, a price needs to be defined for program inventory items in one ore more price lists, which then can be used to determine the appropriate program price for each partner. When the channel manager creates a partner program, he selects which price list or price lists will be used for the program. If the pricing setup can result in finding duplicate prices for a program inventory item, the channel manager must define precedence so that the price with the lowest precedence 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, purchase order, wire transfer, or invoice.

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. **Note**: This setup is not mandatory. If there is no payment rule defined, all of the enabled payment types in

PV_PAYMENT_TYPE lookup are available for all partners, assuming that payment types set up in Order Management are the same for all the orgs.

Navigation

Log on as the channel administrator and navigate to Partner tab > 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:** When creating a payment method rule, LOV will list only the payment types that are enabled in the PV_PAYMENT_TYPE lookup. This lookup is shipped with all the payment types enabled.

For wire transfer, you must set the Allow Multiple Payments system parameter to Yes in Oracle Order Management for each operating unit that is associated with a partner responsibility.

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 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 Oracle iStore), 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 after a program becomes Active.

Navigation

Log in as the channel administrator and navigate to Partner tab > 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.
- Certain fields are seeded in the locking rule and cannot be removed from the Selected Fields area.

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 Partner tab > 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.

- Certain fields are seeded in the mandatory rule and cannot be removed from the Selected Fields area.

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 template, which is presented to a partner user who is enrolling into the program. If the partner agrees to the terms, the partner user can electronically accept the terms and conditions or submit the signed contract to the vendor via fax or regular mail based on available contact response options to the partner's geography.

Oracle Partner Management integrates with the Oracle Contract Management, which allows the vendor to create and manage contract templates. A contract template can be attached to a program based on geography 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 program manager selects the type of contract templates or contracts that he wants to associate with a program and attaches it to a partner program. After 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 template to be available in Oracle Partner Management, the program manager or a user with access to Oracle Contract Management must create contract templates with the document type as Partner Program. Contract templates are created and stored in the Oracle Contract Management Core application.

When setting up a contract, indicate that the intent is Selling.

The legal terms that a vendor organization wants partners to agree to might differ based

on a partner's geographic location, partner member type or partner user's language. Thus, numerous partner program contract templates may need to be set up in Oracle Contract Management. The channel manager then selects the contract templates that he wants to associate with a specific partner program based on geographic and partner member type criteria.

Oracle Partner Management integrates with Oracle Contracts to provide the terms and conditions that can be associated with membership in a partner program. Integration with Contracts Core provides Partner Management with a repository, or a library, of contract templates and clauses. Vendors can associate clauses with one or more contract templates. In addition, vendors can create localized versions of contract templates. Finally, Oracle Contracts provides a contract and clause approval mechanism, through Oracle Workflow Builder, that allows vendors to better control the content of terms and conditions.

If you have multiple organizations in your enterprise, contracts are identified by the organization in which they are created, but they can be used by a program manager in any organization or accepted by any partner user in any organization.

For example, associating a clause with more than one contract greatly reduces the amount of time spent entering and subsequently maintaining terms and conditions. In addition, vendors gain increased flexibility in how they can build templates, as they can add, remove, and rearrange clauses easily.

The Oracle Contracts integration also gives vendors the ability to create localized versions of a contract. This is an important enhancement for vendors that are bound by legal regulations to provide partners with contracts in their own languages. For example, in Canada, a vendor must be able to provide its partners with partner program terms and conditions in either English or French. Similarly, geographic-based contract response options helps vendors to comply with local or regional regulations. A translated version of a template must be in the same operating unit as the base template.

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: If this value is selected, the approver needs to wait to receive the signed

contract and update the contract status to Signed along with providing the contract signed date and contract binding contact information before approving the enrollment.

This setup is applicable for enrollments which have 'Print and Fax' contract response selected. If the partner electronically accepts the contracts while enrolling into the program, contract terms and conditions are accepted by the time enrollment is forwarded to the enrollment approver. If the partner rejects the contract terms and conditions, the partner won't be able to submit the enrollment, and therefore enrollment is not forwarded to the approver.

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 with the PV_PROGRAM_SUMMARY content type in the Oracle Content Manager application, although the text and images are entered by partner managers though Oracle Partner Management. During implementation, the administrator needs to perform two tasks (which are explained in detail in the following sections) 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, update or approve the 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 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 Opportunity Summary transaction link in the quick links bin becomes visible for the partner organization's users.

Responsibility mapping associates a responsibility with one of the two partner user 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

Some organizations choose to 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 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 Partner 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 mapping rule, the concurrent program PV - Update user resp when resp mapping is created, updated, or deleted 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 with the responsibility mapping rule if the responsibility needs to be assigned only upon enrollment into the program.

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.

  Oracle Partner Management ships two responsibility mapping rules. While one is shipped with the geography level as World, user role as primary and responsibility as Default partner user, the other sets the geography level as World, user role as business and responsibility as Default partner user. 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. Customers can update the responsibilities for the seeded mapping rules or create more granular level default responsibility mapping rules.

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

Trading Community Architecture Events and Subscriptions

There are a number of Trading Community Architecture (TCA) events and subscriptions associated with partner programs. These subscriptions expand the application without creating new code, and are not changed when an upgrade patch is applied. Some subscriptions are shipped with the application.

Relationships

In TCA, for global and subsidiary relationships, the relationship types used are PARENT_OF and SUBSIDIARY_OF. Oracle Partner Management provides an asynchronous subscription for the following TCA business events. This keeps the member types up-to-date in PV tables with correct member type and terminates active partner program memberships when the global-subsidiary relationship is inactivated or activated outside of the PV application:

- oracle.apps.ar.hz.relationship.update (subscription API - Pv_ptr_member_type_pvt.terminate_partner)

- oracle.apps.ar.hz.relationship.create (subscription API - Pv_ptr_member_type_pvt.terminate_partner)

Change in Partner Address

To adjust partner responsibilities appropriately when the partner primary address changes, Oracle Partner Management provides an asynchronous subscription to the following TCA business events.

- oracle.apps.ar.hz.location.update (Pv_User_Resp_Pvt.manage_resp_on_address_change)
- oracle.apps.ar.hz.PartySite.update (subscription API - Pv_User_Resp_Pvt.manage_resp_on_address_change)

To ensure that asynchronous subscriptions are run when an event occurs, 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

When a partner is invited into a program, 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 Options, 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, for additional information.

Concurrent Programs

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

9

Setting Up Partner Program Enrollments

This chapter covers the following topics:

- Overview of Partner Program Enrollments
- Creating the Partner Dashboard Site
- Creating Partner Program Enrollment Pages
- Setting Up Oracle Order Management
- Setting Up Oracle Payments Server
- Setting Up Credit Card Security
- Setting Credit Card Profile Options
- Setting Up Runtime Variables
- Setting Up Tax Rules
- Setting Up Enrollment Request Approvers
- Users and Security

Overview of Partner Program Enrollments

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 Enroll 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.
- A request to the partner for billing and payment information if a fee is associated with program membership.

All the program enrollment-related items listed above were set up by program managers as part of the partner program creation process. For more information on creating partner programs, refer to Chapter 8, Setting Up Partner Programs. 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 the Partner Dashboard Site

After the partner dashboard is set up, be sure that program bins are mapped to one of the locations on the Partner Dashboard. Partner Dashboard sites are created in iStore by a user with the iStore Administrator responsibility.

Creating Sections

Log in to iStore as the administrator to create sections. The catalog hierarchy page provides a visual representation of the sites an organization has created. The Root section is the parent for all other sections. The root is never accessed by users, and does not contain content. Under Root, an area has been seeded for Partner Management: Partner Sites Hierarchy. This is known as the Partner Management site root, and you add subsections underneath this section to create the Partner Dashboard. The subsections that appear directly below the site root appear on the Partner Dashboard as tabs, which correspond to pages.

When you provide information about the section, select Featured section if you want the section to contain information but not products. Select Published to make the tab visible on the site. When a section's status is Unpublished, the section appears on the Preview UI for the site administrator, but it does not appear on the public UI viewed by partners.

Selecting Layout and Display Templates for the Site

The structure and appearance of your site pages is determined by the layout and

templates you choose for the sections. There are two template types that you use--the Layout template and the Display template. The Layout template determines whether all sections included in your site have the same bin locations (a Fixed Layout) or whether each section can have separate bin locations (a Configurable Layout). It also provides templates for all but the center section. The Display template determines the appearance of the center section.

Two types of layout templates are available: The Configurable Layout allows you to configure bins by section, meaning that each section can have a mapped bin (or bins) in a different location. For example, on the Partner Dashboard demo page, you can use a Configurable layout if you want different bins to appear on the Home page than appear on the Support or Products pages. The Fixed Layout insures that bin location will be the same for the site. In addition, when you select Fixed Layout, you must map the bin JSPs to templates. Refer to the *iStore Implementation Guide* for further information.

When you select a configurable layout, the right and left sides of the page are used to display bins. The center of the page is available for additional content. The appearance of the center part of the page is determined by the Display Template used. (Display templates are also sometimes referred to as Section Templates.) Subsequently, all sections that use the same Display Template will have the same center section rendering, but can have different bins surrounding the center.

The display template that you use for a section is determined by whether you intend the section to be Navigational or Featured: Navigational sections can contain either products or subsections, but not both. Featured sections can contain products only. For a section using a Configurable layout, the following types of Display Templates are used by Partner Management:

- Component for Sections Containing Navigational Subsections Only
- Component for Sections Containing Products Only

Each type of display template has a group of actual templates associated with it. The UI provides an illustration that gives an approximation of how the page will look with the template selected. You can also create a custom template and select it. Each template is actually a JSP; creating a custom template involves creating a new JSP. For further descriptions of each template, including the JSP file name and programmatic access name, refer to the *iStore Implementation and Administration Guide*.

Mapping Bins to Sections

A number of bins have been seeded for Partner Management:

- Quick Links
- Available, Upgrade, and Renewal Programs
- My Opportunities

- Manage My Partners
- Welcome
- Marketing Posting
- Partner Group
- Store Group

Bins hold specific information, in the form of JSP files. On a page, bins appear in a specific formation (left, right, top, and bottom). The bins provided for Partner Management are mapped to JSP files automatically. You can also change a seeded JSP mapping for a bin, if required. For more details on working with bins, refer to the *Oracle iStore Implementation and Administration Guide*.

You can enable a Quick Links bin on the Partner dashboard to provide partners with links to Oracle Partner Management features, such as deals, referrals, and opportunities. Out-of-the-box, this bin is mapped to a JSP, but you must create a menu linked to a responsibility to allow users with the responsibility to see the bin. The bin's programmatic access name is: STORE_QUICK_LINKS_BIN_IBEWC. Its JSP is: ibeCAcdQuickLinkBin.jsp.

All links inside a bin are rendered as relative URLs. Thus, if the container page is non-secure, all the links inside the bin will be non-secure as well, and vice versa.

Specifying Content

Oracle iStore features reusable content tools that allow you to present content in the Partner Dashboard UI. The content tools allow you to map content source files to UI pages. The content can be images, HTML files, or text messages. During iStore implementation, the mechanism for content storage is specified. Content can be stored in a content database, a file list, or Oracle Content Manager.

A content component is a placeholder that expects a certain type of content. The types of content components that are available for a section are determined by the display template associated with the section. A media object is a logical bridge that connects content component placeholders with source files to present images or HTML content in the UI. Content components define the types of media objects that can appear on a web page. All but the Message, Other, and Logo classes of media objects must be linked to a content component in order to present information in the UI. A media object links to at least one source file. A media object can be associated with more than one file. Note: In the iStore framework, a media object is associated with an image or a text file. A template is associated with a Java Server Page (JSP).

Six seeded content components are available:

- Product Large Image

- Product Small Image
- Product Additional Information
- Section Small Image
- Section Additional Information
- Section Additional Information 1 Through 5

Enabling the Site and Mapping Responsibilities

Creating the site makes the Partner Dashboard available for partner users. When you create the site, you specify the partner user responsibilities required to access the dashboard.

When you are creating the site, select the 'Restrict customer access by responsibility' check box. Do not select the 'Allow un-registered users to browse the site' check box.

Responsibilities determine the operating unit against which any orders that are placed in the current session are booked. In the Site Display Name field, enter a unique name. The name should help in identifying that the site is applicable to partners.

Groups provide ways to organize an organization's specialty sites on the Site Selection page. When a customer goes to the Site Selection page, he sees a list of sites organized according to Group: for example, Partners sites or Store sites. Without Group information, a site's intended customer base might not be obvious based on the site name alone. The list of groups is populated by the IBE_M_SITE_GROUP lookup. Additional groups can be added to the list by editing this lookup.

Creating Partner Program Enrollment Pages

Oracle Partner Management leverages iStore's template management framework to achieve the same look and feel as partner dashboard. Users can now enroll into a program from the partner dashboard provided by a common foundation component called Template Management Framework.

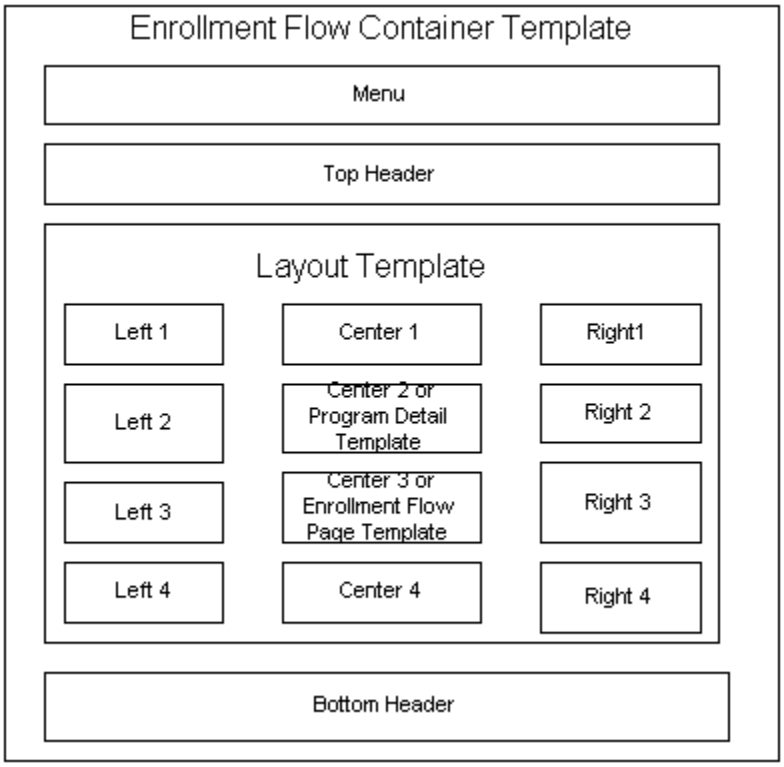
- The top header renders <html>, <head> tags. Customers can add anything that they would like to see prior to menu rendering in this page.
- The Left 1, Left 2, Left 3, Left 4, Right 1, Right 2, Right 3, Right 4, Center 1, Center 2, Center 3 and Center 4 templates are part of the Layout template.
- The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

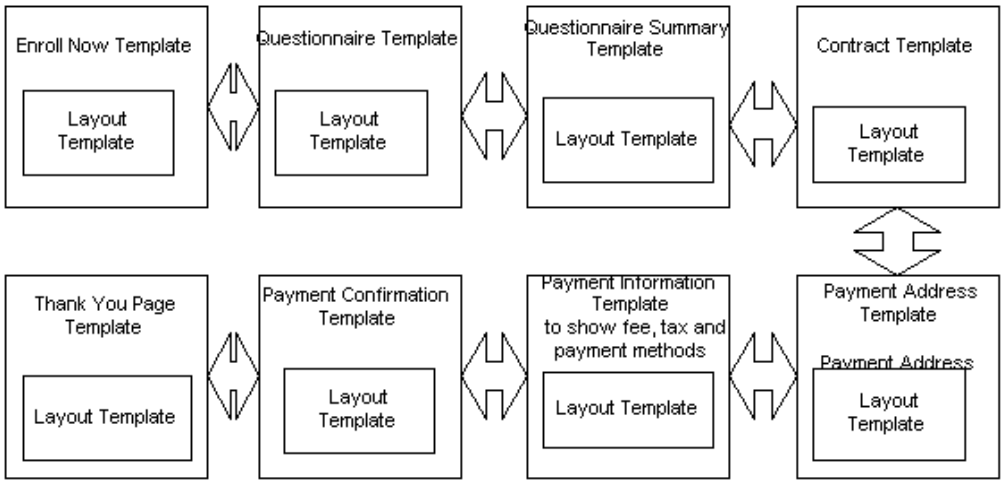


Each page in the enrollment flow has different data that needs to be processed when user clicks the Next button. Hence, each page in the enrollment flow has separate container pages. To minimize the amount of work when a customer wants to customize the layout, the same layout template is used across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

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.

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 valid sales rep (a fictional sales rep can be created, if necessary). As sales reps are org striped, this profile option needs to be set at either the responsibility or site level depending on what orgs the partner users belong to. At run time, sales rep retrieved from this profile option needs to be a valid sales rep for the 'MO: operating Unit' of the user's logged-in responsibility.

- **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
  - 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. Set this profile option to any transaction type that is applicable for non shippable items. As Order Management transaction types are org striped, this profile option needs to be set at either the responsibility or site level depending on what orgs the partner users belong to. At run time, the transaction type retrieved from this profile option needs to be a valid transaction type for the 'MO: operating Unit' of the user's logged-in responsibility.

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 Payments Server

Credit card payments are handled by the Oracle Payments application. An Oracle Payments user with the Payment Administrator responsibility sets up and maintains the Oracle Payments application and server. For information on setting up and maintaining the Oracle Payments Server, refer to the *Oracle Payments 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 user https through two profile options:

- **IBE: iStore Secure URL:** Use to specify a secure server and port for payment pages.
- **IBE: iStore 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.

Setting Up Credit Card Security

A partner user can pay for a partner program enrollment with a credit card. Using the Payment Book within the Profile menu of the Oracle iStore Customer Application, partners can store credit cards to be used during the enrollment process when a program has a fee. The partner can mark a single credit card as preferred; this credit card is defaulted into the payment method page in the enrollment flow when the credit card is used as the payment method. The Payment Book is available as part of the partner's profile.

Oracle Payments integration allows a vendor to decide whether or not to require a card holder to provide the CVV2 code during payment transactions. This global setting is set on the System Security Options page in Oracle Payments. If the vendor decides to use the CVV2 code, a mandatory field appears on the payment method page in the enrollment flow. The CVV2 code is not stored with the partner's credit card number in Oracle Payments.

Further security is provided by the Address Verification Services (AVS) feature in Oracle Payments. This feature is set up in Oracle Payments on the System Security page. If this feature is enabled, the statement address is matched against the user's credit card billing address. A Credit Card Statement Address drop-down field with the list of active addresses of logged in partner contacts appears on the payment method page in the enrollment flow, from which the partner user can select an address. The default setting is "Same as Billing Address."

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. 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. The default value is 3.

Setting Up Runtime Variables

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

For information on how to use the java runtime 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 or reject the request. You can set up multiple approvers. 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, which is used when AME does not return any approvers for any enrollment request. For more information on setting up approvals for program enrollment requests, refer to Creating Approval Rules in Oracle Approvals Manager, page 15-3 .

Users and Security

The 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.

10

Setting Up Opportunity Management

This chapter covers the following topics:

- Overview of Opportunity Management
- Partner Subscriptions for Opportunities
- Integrating with Oracle Sales
- 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
- Opportunities and Security
- Profile Options
- Concurrent Programs

Overview of Opportunity Management

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, marketing campaign, deal, or referral, 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. The Partner

Management Opportunity Management module provides a flexible mechanism to control the distribution of notifications associated with opportunities.

Oracle Partner Management integrates with Oracle Sales to provide indirect opportunity management functionality. Oracle Sales has a Partner tab available on the Opportunity Detail page. From the Partner tab, a channel manager can search for and assign partners to an opportunity and track assignment history. When an organization deploys Oracle Partner Management, the Partner tab can be exposed though Personalization.

On the Partner Dashboard, the same opportunity pages are exposed to the partner as are to the vendor, but the vendor can use Personalization to control the information and flows that are available for partner users. Partners can be assigned two levels of update access for opportunities--read-write or read-only.

A vendor can control partner opportunity access four ways:

- Through a profile option that determines the opportunity access level for all partners
- By specifically granting or denying an individual partner contact access to a specific opportunity
- By even more restrictive rules set up in OA
- Through a profile attribute, Allow Partner to Edit Opportunities, which specifies opportunity access on a partner-by-partner basis

Partner Users can accept multiple offered opportunities simultaneously. Vendors can see opportunity assignment history information on opportunities offered to partners.

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 10-3 for more information.

Partner Subscriptions for Opportunities

The following are the partner subscriptions used for Opportunities in Oracle Partner Management: The same format is used for subscriptions as is shown in the section of this document called How Event Updates Work, page 4-11. The specific details of four fields changes for each subscription. Those fields are shown below:

Opportunity Post-Create

Event Filter: oracle.apps.asn.opportunity.postcreate

Rule Function: oracle.apps.pv.oa.opportunity.util.server.PvCreatOppSub

Phase: Immediate

Description: Partner Management Opportunity Post-Create Subscription.

Opportunity Pre-Update

Event Filter: oracle.apps.asn.opportunity.preupdate

Rule Function: oracle.apps.pv.oa.opportunity.util.server.PvUpdateOppSub

Phase: Immediate

Description: Partner Management Opportunity Pre-Update Subscription

Integrating with Oracle Sales

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.

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.

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. A partner contact is accessed through the partner organization, and thus a contact cannot 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 to R12 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, Concurrent Programs..

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 of 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. Partners should not have access to this information.
- 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.

Opportunity Matching and Routing

Opportunity **matching** refers to the process of identifying a partner to whom an opportunity should be offered by searching manually or based on a matching rule. 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 10-9 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 or for the opportunities that are created with Campaign association.

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 for opportunities that are converted from leads, 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.

To implement automatic background matching for opportunities that are associated with campaigns, the channel manager creates matching rules that contain partner routing criteria (routing criteria is optional for other types of matching). For this campaign based routing to happen, the profile option PV: Enable Automatic Routing by Campaign must be set to Yes.

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. Multiple partners can not be selected for this routing type.

- **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 offered to them.

- **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 do not see the opportunity offered to them. 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 10-14.

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 Partner tab >

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 are 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. Opportunity profile attributes are used while routing opportunities to partners. You select one or more attributes and then further define conditions for the attribute, such as "equal to," " between," or "greater than". To display these opportunity profile attributes in Oracle Sales, use the flexfields provided at the header and line level of opportunity.

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 10-15 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 set to 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 Timouts, 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 using 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 and the Oracle 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 15-4.

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> 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>

Opportunities and Security

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

Opportunity Owner Identification

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 four 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.
- **Partner by Partner:** Through a profile option, Allow Partner to Edit Opportunities, vendors can specify opportunity access on a partner-by-partner basis.
- **Partner and Opportunity:** The vendor can specifically grant or deny an individual partner contact access to a specific opportunity.

for the first two levels, 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, 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, Concurrent Programs, for information about setting up and running the programs.

11

Setting Up Referral Management

This chapter covers the following topics:

- Overview of Referral Management
- Partner Subscriptions for Referrals
- Setting Up Budgets
- Setting Up Offers
- Setting Up Claims
- Enabling Profile Attributes for Referrals
- Specifying Product Categories Available for Referrals
- Setting up Approvals
- Assigning Referral Permissions
- Setting up Notifications
- Setting up Territories
- Setting up Data Quality Management (DQM)
- Setting up Notes
- Creating a Referral Benefit
- Specifying a Sales Channel
- Profile Options
- Lookups
- Concurrent Programs

Overview of Referral Management

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.

Partner Subscriptions for Referrals

The following are the partner subscriptions used for Referrals in Oracle Partner Management: The same format is used for subscriptions as is shown in the section of this document called How Event Updates Work, page 4-11. The specific details of four fields changes for each subscription. Those fields are shown below:

Claim Paid

Event Filter: oracle.apps.ozf.claim.paymentPaid

Rule Function: pv_benft_status_change.CLAIM_REF_STATUS_CHANGE_SUB

Phase: Immediate

Description: Update referral status to "Closed. Fee Paid."

Claim Referral Approval

Event Filter: oracle.apps.ozf.claim.referralApproval

Rule Function: pv_benft_status_change.CLAIM_REF_STATUS_CHANGE_SUB

Phase: Immediate

Description: Update referral status to "Awaiting For Partner Acceptance" which in turn triggers the partner approval process.

Claim Update Status

Event Filter: oracle.apps.ozf.claim.updateStatus

Rule Function: pv_benft_status_change.CLAIM_REF_STATUS_CHANGE_SUB

Phase: Immediate

Description: Update referral status to "Compensation Cancelled."

Referral Status Change

Event Filter: oracle.apps.pv.benefit.referral.statusChange

Rule Function: pv_benft_status_change.status_change_sub

Phase: Deferred

Description: Triggers e-mail notification upon referral status change

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

The seeded custom setup Net Accrual Offer is used with partner referrals. When a partner's referral request is created and activated, a net accrual offer based on this custom setup is created automatically in Oracle Trade Management. 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:

- Easily identify partner referral claims. 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 unique prefix for that customer.

- 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.

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 answers that 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 box must be checked for the attribute. For more information on working with partner profile attributes, refer to Chapter 7, Setting Up Partner Profile Attributes.

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	-	-

Partner Profile Attribute	Map to Opportunity	Map to Lead
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

Specifying Product Categories Available for Referrals

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 Product Hub User's 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 one or more approvers, who are vendor users. The approvers can approve, reassign, or reject the request. The partner referrals approvals process is set up and managed through the Oracle Approvals Management application.

The vendor can configure approval workflow to route incoming referrals to multiple approvers simultaneously. This is called parallel approval. The approver group can approve the referral in first come, first serve mode, in consensus, or in serial order, depending on the way it is set up in the Approval Management System. In most

companies, more than one person is empowered to approve or decline referrals. Thus, parallel routing enables vendors to better model their company's internal business processes. For instance, a company may have the first level be a specific person, such as the partner's channel manager, and the second level be a group of people, such as multiple directors. Parallel routing also prevents a transaction from being stuck in the approval queue when an approver is busy or on vacation. The group of approvers can be assigned at any approval level.

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 15-3.

Assigning Referral Permissions

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.

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 using 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 and the Oracle database.

This business event is raised whenever there is a change in the status of the Referral benefit:

oracle.apps.pv.benefit.referral.statusChange

In Oracle 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 Accepted - Partner Notification	Partner Contact, Referral Superuser (Partner)	Approved
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 Partner Acceptance
Referral Declined - Partner Notification	Partner Contact, Referral Superuser (Partner)	Declined
Referral Returned Vendor Notification	Vendor Approvers, Vendor Channel Managers, Referral Superuser (Vendor)	Returned
Referral Returned Partner Notification	Partner Contact, Referral Superuser (Partner)	Returned
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

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. 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 15-3.

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 customer fields used for detecting duplicates are:

- Customer Name
- Customer Address 1-4
- City
- Country
- State
- Province
- Zip/Postal Code
- Customer Name Pronunciation

The contact fields used for detecting duplicates are:

- First Name
- Last Name
- E-mail Address

- Phone Type
- Phone Number

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 DQM. The channel administrator can build rules on:

For more information on using DQM and creating rules, refer to Setting up Matching Rules with Oracle Data Quality Management, page 15-5.

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 cannot 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 responds to these questions on the referral create page. These responses are stored as additional information about the referral. Some of them 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 cannot 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:** Clickto 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.

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, 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, for more information.

Concurrent Programs

There are several concurrent programs that need to be run periodically for referral requests. Refer to Appendix C, Concurrent Programs, for information about setting up and running the programs.

12

Setting Up Deal Registration

This chapter covers the following topics:

- Overview of Deal Registration
- Partner Subscriptions for Deal Registration
- 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
- Assigning Deal Registration Permissions
- Profile Options
- Lookups
- Concurrent Programs

Overview of Deal Registration

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

Partner Subscriptions for Deal Registration

The following are the partner subscriptions used for Deal Registration in Oracle Partner Management: The same format is used for subscriptions as is shown in the section of this document called How Event Updates Work, page 4-11. The specific details of four fields changes for each subscription. Those fields are shown below:

Deal Status Change

Event Filter: oracle.apps.pv.benefit.deal.statusChange

Rule Function: pv_benft_status_change.status_change_sub

Phase: Deferred

Description: Triggers e-mail notification upon deal registration status change

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

Question	Map to Opportunity
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, 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.

The vendor can configure approval workflow to route incoming deal registration requests to multiple approvers simultaneously. This is called parallel approval. The approver group can approve the referral in first come, first serve mode, in consensus, or in serial order, depending on the way it is set up in the Approval Management System. In most companies, more than one person is empowered to approve or decline deals. Thus, parallel routing enables vendors to better model their company's internal business processes. For instance, a company may have the first level be a specific person, such as the partner's channel manager, and the second level be a group of people, such as multiple directors. Parallel routing also prevents a transaction from being stuck in the approval queue when an approver is busy or on vacation. The group of approvers can be assigned at any approval level.

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 15-3.

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 using 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 and the Oracle database.

In Oracle 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 Accepted - Partner Notification	Partner Contact, Referral Superuser (Partner)	Approved
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 Returned - Vendor Notification	Vendor Approvers, Vendor Channel Managers, Referral Superuser (Vendor)	Returned
Deal Registration Returned - Partner Notification	Partner Contact, Referral Superuser (Partner)	Returned
Deal Registration Created - Partner Notification	Partner Contact, Referral Superuser (Partner)	Pending Approval
Deal Registration Created - Vendor Notification	Vendor Approvers, Vendor Channel Managers, Referral Superuser (Vendor)	Pending Approval

The business event oracle.apps.pv.benefit.deal.statusChange is raised whenever there is a change in the status of the Deal Registration benefit. 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

Deal Registration Status	Deal Code
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, only countries in that territory are available.

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 15-3.

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 customer fields used for detecting duplicates are:

- Customer Name
- Customer Address 1-4
- City
- Country
- State
- Province
- Zip/Postal Code
- Customer Name Pronunciation

The contact fields used for detecting duplicates are:

- First Name
- Last Name
- Email Address
- Phone Type
- Phone Number

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 15-5.

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 15-6.

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 will respond to these questions on the deal registration create page. These responses are stored as additional information about the deal registration. Some of these responses are used to populate fields on an 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:** Clickto run the benefit validation process.

The Benefit Activation Process

During the creation process, a benefit goes through three benefit statuses: Draft, Inactive, and Active. When a benefit is created, it can be saved in the draft status by clicking Apply. If any of the Header fields are not filled in, the user is not allowed to

save. After it is saved, the deal benefit goes to Draft status, and then the user can manually set it to Active. If the benefit passes validation, its status changes to 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.

Assigning Deal Registration Permissions

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, 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, 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, Concurrent Programs, for information about setting up and running the programs.

13

Setting Up Special Pricing Management

This chapter covers the following topics:

- Overview of Special Pricing Management
- 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
- Assigning Special Pricing Permissions
- Setting Up Notifications
- Setting up Data Quality Management (DQM)
- Setting up Notes
- OAM Transaction Types and Attributes
- Profile Options
- Lookups
- Concurrent Programs

Overview of Special Pricing Management

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 the 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 is a fixed budget. 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

Special Pricing budgets are funded from one or more fixed budgets, usually set up at the country level. Use the profile option OZF: Default budget for special pricing to indicate whether your organization has one or multiple special pricing budgets.

- For a single budget, specify the name of the budget at the Site level
- For multiple budgets, specify each specific budget at the Responsibility level, with the responsibility corresponding to a business unit or a geographical entity.

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 Oracle 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 amounts:

- Planned: The planned amount increases when a request is made on that budget.
- Committed: The committed amount increases when the budget request is approved.
- Utilized: If an Accrual or Off-Invoice offer is generated, the utilized amount increases when an order is booked. If a Scan Data offer is generated, the utilized amount increases when the offer is approved.
- Earned: If an Accrual or Off-Invoice offer is generated, the earned amount increases after the order is shipped. If a Scan Data offer is generated, the earned amount increases when the offer is approved.
- Paid: For Scan Data and Accrual offers, the paid amount increases after claims are closed. For Off-Invoice offers, 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 after` 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 a custom claim, if required. Creating a custom claim provides the following benefits:

- Because 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 custom claim allows you to set up a new prefix that can be used to easily identify special pricing claims.

- You can set up a different approval routing process for different types of claims. The default claim does not implement a claims approval process.

- You can 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 set up 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 15-3.

Assigning Special Pricing Permissions

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 record or create a new record.

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 using the Oracle Workflow Builder application. An organization can 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 and the Oracle database.

In Oracle 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	--

Notification Name	User	SP Request Status
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 15-5.

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 to 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 15-6.

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

Attribute	Description	Requiring Approval Types
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, 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, for more information.

Concurrent Programs

There are several concurrent programs that need to be run periodically for special pricing. Refer to Appendix C, Concurrent Programs, for information about setting up and running the programs.

14

Setting Up Partner Funds Management

This chapter covers the following topics:

- Overview of Partner Funds Management
- 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 of Partner Funds Management

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, which 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:** SelectLine
- **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 Oracle 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 set up 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 funding. 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 an user with the administrator responsibility. Up to eight geographic levels can be specified.

Geography may already be set up for your implementation, because 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 15-3.

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 using 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 and the Oracle database.

In Oracle 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

Notification Name	User	Partner Fund Request Status
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 to 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 15-6.

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

Attribute	Description	Requiring Approval Types
IS_VAD	To find whether the partner is a distributor	None
MEMBERSHIP_TYPE	Partner Membership Type	None
PARTNER_AMOUNT	Partner Amount	None
PARTNER_COUNTRY	Partner Country	None
PARTNER_INDUSTRY	Partner Industry	None
PARTNER_LEVEL	Partner Level	None
PARTNER_NAME	Partner Name	None
PARTNER_TYPE	Partner Type	None
REQUESTED_AMOUNT	Requested Amount	None
SOFT_FUND_BENEFIT	Soft Fund Benefit	None
TOTAL_AMOUNT	Total Amount	None
ACTIVITY	Activity	None

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, 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, for more information.

Concurrent Programs

There are several concurrent programs that need to be run periodically for partner funds. Refer to Appendix C, Concurrent Programs, for information about setting up and running the programs.

15

Common Implementation and Administration Tasks

This chapter covers the following topics:

- Overview of Common Implementation and Administration Tasks
- 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 of Common Implementation and Administration Tasks

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 is 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 perform 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. To perform the procedures for these associated applications, you will want to refer to the documentation for the application.

The following table lists the implementation and administration tasks mentioned 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 Lead or opportunity referral requests Partner funds requests Partner program enrollment requests Special pricing requests	Oracle Approvals Management
Setting up Territories	Channel team creation Deal registration requests Lead or opportunity referral requests	Oracle Territory Manager
Setting up Notifications	Deal registration requests Lead or opportunity referral requests Partner funds requests Partner program enrollment requests Special pricing requests	Oracle Workflow Builder
Setting up Matching Rules	Special pricing requests Deal registration requests Lead or opportunity referral requests	Oracle Data Quality Management
Setting up Notes	Deal registration requests Lead or opportunity referral requests Partner fund requests Special pricing requests	Oracle Common Application Components

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. For information about rule creation, refer to the *Implementing Oracle Approval Management* guide.

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 matching attributes, setting up the territory, and running concurrent programs to populate the territory. For detailed information about the application and territory creation and management, refer to the *Oracle Territory Manager Implementation Guide.*

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 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	PVREFFRL
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 and the Oracle database. Note that you can not create new notifications for opportunity routing or assignment, but you can modify the text of the seeded notifications.

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

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

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. To set up DQM rules, refer to the *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.

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.

For information about notes, refer to the *Oracle Common Application Components Implementation Guide*.

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Setting up the Partner Locator

This chapter covers the following topics:

- Overview of Partner Locator
- Defining a Hyperlink for the Locator
- Enabling Partner Profile Attributes for Advanced Search
- Setting Profile Options
- Running Concurrent Programs

Overview of Partner Locator

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 are mapped 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.

Both the Matching Services and Locator checkboxes must be selected for a partner profile attribute to be available for the partner locator.

For more information on partner profile attributes, refer to Chapter 7, Setting Up Partner Profile Attributes.

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.

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, Concurrent Programs.

A

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 and Program Enrollments
- 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 System 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 `PV: Item Validation Organization`, or a wildcard search criterion such as `PV%`.

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.
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	If the value is Yes, the channel team assignment occurs automatically when a partner is created or updated. 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. Note: If you are importing a large number of partners from an external system, it is recommended that you set the option to No.
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.
ASN: Opportunity Access Privilege		Site Application Responsibility User	Full Sales team	This profile 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 the opportunities.
PV: Default Deal Registration Approver		Site Application User	A user	Specifies a user as the default deal registration 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	Required	Level	Setting	Description
PV: Default DQM Approver		-	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.
PV: Assign Approvers to lead or opportunity		Site Application Responsibility	Yes No	When set to Yes, the deal registration approvers are automatically added to the sales team if the deal registration generates an opportunity or lead. When a lead is created, the owner of the lead is set to the first approver for the deal registration. 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.
PV: Assign Channel Manager to sales transactions		Site Application Responsibility	Yes No	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. 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.

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: Enable Single Column Layout in Additional Details		Site Application Responsibility User	Yes/No	When this profile is set to 'Yes' the attributes on the additional detail section on the Referral/Deal Registration Create Screen are rendered in a Single Column. By default the format is double column.
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.
HZ: Generate Party Number		Site Application Responsibility User	Yes No	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.

Profile	Required	Level	Setting	Description
HZ: Generate Party Site Number		Site Application Responsibility User	Yes No	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.

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.
PV: Default Enrollment Request Approver	Yes	Site Application	A user	Specifies a user as the default enrollment 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.

Option	Required	Level	Setting	Description
PV: Allow Approval Without Contract	Yes	Site	Yes No	Determines whether or not a partner program enrollment request can be approved before a signed contract is received from the partner. Yes: Approval without signed contract is allowed. No: A signed contract must be received before a request can be approved.
PV: Default Salesperson used for Orders	Yes	Responsibility or Site level depending on what orgs partner users belong to (sales reps are org striped)	A valid Sales rep. At run time, sales rep retrieved from this profile option needs to be a valid sales rep for the 'MO: operating Unit' of user's logged in responsibility	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: • 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	Responsitiliby or Site	Any transaction type that is applicable for non-shippable items and that can provide invoicing capability.	As Order Management transaction types are org striped, this profile option needs to be set at either responsibility or site level depending on what orgs partner users belong to. At run time, transaction type retrieved from this profile option needs to be a valid transaction type for the 'MO: operating Unit' of user's logged in responsibility.
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.
IBE: iStore 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: `https://qapache.us.oracle.com:2000/OA_HTML/`

Option	Required	Level	Setting	Description
IBE: iStore 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: `http://qapache.us.oracle.com:1111/OA_HTML/`
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	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. 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.
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	Possible Values: 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. 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.

Option	Required	Level	Setting	Description
PV: Enable Full Access on Opportunity to Partner	Optional	Site	Yes	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. If set to Yes, the partner, after accepting the opportunity can update the opportunity details. If set to No, the partner user has read-only access to the opportunity. In addition, the partner can create notes and add attachments.
PV: Filter Partner Search by Identifying Address	Optional	Site Application Responsibility	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.
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.

Option	Required	Level	Setting	Description
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.
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.

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

Option	Required	Level	Setting	Description
PV: Enforce Address Filters in Partner LOV	Yes	Site	Yes/No	If set to Yes, the partner LOV allows a search based on partner name and address.
PV: Java Class to Restrict ORG Access Privilege	Optional	Site	Java Class Filename	Customizable Java Class is available to restrict partners from accessing customer details from the opportunity pages by clicking the customer link.
PV: Locator Default Distance Unit	Yes	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 `www.proxy.us.oracle.com`.
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	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. See Profile PV: Rule for Automatic Matching.
PV: Max Number of Matched Partners	Yes	Site	-	Maximum number of partners returned during partner matching (manual and automatic). If the value is not specified, the number of partners returned is 10.
PV: Offered Notification Flag	Optional	User	Yes/No	If set to Yes, the user receives an e-mail notification when an opportunity routing status changes to Offered.
PV: Require Opportunity Contact for Manual Routing	Optional	Resp	Yes/No	Do not allow, or allow assignment routing if there are no opportunity contacts. When set to Yes, a contact name for the opportunity is required for manual and batch routing to start. If set to No, a contact name is not required. The default is No.
PV: Restrict Sales Team Partner Contact LOV	Optional	Site	Yes No	For customer external sales team, if 'Yes', restrict the display of contacts to those partners that the sales team member can access.

Option	Required	Level	Setting	Description
PV: Rule for Automatic Matching	Yes	Site	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.
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 `http://elocation.oracle.com/elocation/lbs`). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update.

Option	Required	Level	Setting	Description
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.
PV: Locator Server URL	Yes	Site	`http://elocation.oracle.com/servlets/lbs`	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	`http://Machine Name:Port No/OA_HTML/ibeCAcdLogin.jsp?ref=ibeCZzdMinisites.jsp?grp=PARTNER`	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	`http://Machine Name:Port No/OA_HTML/ibeCAcdLogin.jsp?ref=ibeCZzdMinisites.jsp?grp=PARTNER`	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
ASO: Default Quote Status	Yes	Application	STORE DRAFT DRAFT	Set to *STORE DRAFT* if iStore is used as the partner ordering tool. If quoting is used as the partner quoting / ordering tool, set to *DRAFT.*
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_R EGION	Yes	Responsibility	PV_PARTNER _FUNC_SEC_R EGION	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.

Option	Required	Level	Settings	Description
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.
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.

Option	Required	Level	Settings	Description
IBE: Use Web Placements	Yes	-	-	Needs to be set to View eMerchandising Postings in the marketing postings bin. The Marketing postings bin requires additional implementation steps to see the eMerchandising postings in the partner site. For more information, see *Oracle iStore Implementation Guide*.
IBE: Quick Links Menu	Yes	Responsibility	-	This is a mandatory profile if the Quick Links bin needs to be displayed when logging in with a particular responsibility. Needs to be set up to the correct FND menu from which quick links are rendered. This needs to be setup at responsibility level for partner site responsibility. Partner Super User responsibility should have this profile option set up as a Partner User Sub Menu.

Option	Required	Level	Settings	Description
IBE_USE_ORDER_TRACKER	Optional	Site Application Responsibility User	-	The order tracker icon is displayed by default in the global icons section of any site. The icon can be disabled using this profile. This profile has the site level value seeded as Yes. Customers can turn off this profile at the application level if Oracle Partner Management and Oracle iStore are not implemented together in one site. If Oracle iStore and Oracle Partner Management are both implemented, this profile should be set to No at the partner responsibility level.

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

Profile Name	Required	Level	Setting	Description
PV: Locator Proxy Server	Yes	Site Application Responsibility User	address	Proxy Server address
PV: Locator Server URL	Yes	Site Application Responsibility User	http://elocation.orcle.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 sill 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.
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.

Profile Name	Required	Level	Setting	Description
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 `http://elocation.oracle.com/elocation/lbs`). This is used by the TCA concurrent program, Spatial Information for Locations Batch Update
HZ: Web Server Proxy Host Name	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.

Profile Name	Required	Level	Setting	Description
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: Enable Profile Attribute Security	Required	Site	No	Used to control if users can only view or view and update partner attributes
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.
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.

Profile Name	Required	Level	Setting	Description
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 and Program Enrollments

To implement partner programs, set the profiles listed in the following table.

Profile Options for Partner Programs and Program Enrollments

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.
PV:Self Service URL with Workflow Notification	Yes	Site	`http://servername:port/OA_HTML/US/ICXINDEX.htm`	Defines the URL for the self-service log that is embedded in the program approval request notifications that are received by a vendor user.

Option	Required	Level	Setting	Description
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	`http://Machine Name:Port No/OA_HTML/ibeCAcdLogin.jsp?ref=ibeCZzdMinisites.jsp?grp=PARTNER`	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.
PV: Contract Terms Layout Template for Preview		Site		Layout Template for Formatting Terms and Conditions in Partner Management when previewing a template or an accepted contract.

Option	Required	Level	Setting	Description
IBC: Use Access Control	Optional	Site	Yes Null No	Determines whether a security check is required when a vendor user accesses Oracle Content Manager to set up a Program Overview. No or Null: Disables the security check. Yes: Enables the security check. When Yes is specified, addition security set up is required within Oracle Content Manager.
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.

Option	Required	Level	Setting	Description
Self Service Accessibility Feature	Yes	Site	Screen Reader Optimized NONE Standard Accessibility	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. Three settings are available for the editor: 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

Option	Required	Level	Setting	Description
PV: Concatenated Inventory Flex Segments for Program	Yes	Site Application Responsibility	Free flow text	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: 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.
QP: Multi-Currency Usage	Yes	Application	Yes No	Determines whether or not an application can use multiple-currency price lists. Make sure that other Oracle applications that use price lists and that you are integrating with have the same setting for this profile options. By default, no setting is provided for the profile.

Option	Required	Level	Setting	Description
JTF_PROFILE_DEFAULT_RESPONSIBILITY	Yes	Site	Same as vendor responsibilities	For any vendor responsibilities which have access to the Oracle Partner Management lists of values, set the profile value to the same responsibilities. Make sure the profile value in user level is set to null.
PV: Default UOM Code	Yes	Site	Unit of measure used by enterprise	You must set the unit of measure for the master inventory to ensure that the unit of measure matches up with your inventory application.
OZF: Global Flag for Pricing Related Objects	Yes	Site or Application		Mandatory

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.	This profile option specifies the indirect sales channel to which all opportunities that are generated for a specific partner from referral will be assigned. 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.
ASN: Lead Access Privilege		Site Application Responsibility User	Full Sales Team	This profile determines which leads a user can access. If set to Sales Team, a user can only access leads 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 the leads.

Option	Required	Level	Setting	Description
ASN: Opportunity Access Privilege		Site Responsibility User	Full	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. 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. If this profile is set to another value, users can only view referrals linked to opportunities for which they are on the sales team.
PV: Default Referral Approver		Site	A user	Specifies a user as the default referral request 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.

Option	Required	Level	Setting	Description
PV: Assign Approvers to lead or opportunity		Site Application Responsibility	Yes No	When set to Yes, the referral approvers are automatically added to the sales team if the referral generates an opportunity or lead. When a lead is created, the owner of the lead is set to the first approver for the referral. 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.
PV: Assign Channel Manager to sales transactions		Site Application Responsibility	Yes No	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. 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.

Option	Required	Level	Setting	Description
PV: Copy Lead Owner or Sales team members on approval notifications		Site Application Responsibility	-	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. Note: The referral benefit must be configured to send notification to those user types.
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	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.

Option	Required	Level	Setting	Description
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 funds later.
OZF: Allow committed budget to exceed total amount		-	Yes No	If set to Yes, the referral benefit can be activated even though the requested budget amount exceeds the total budget amount. If set to No, the referral benefit will fail validation if the requested budget amount exceeds the total budget amount.
PV: Contact Relationship Codes		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.

Option	Required	Level	Setting	Description
PV:Self Service URL with Workflow Notification		Site	<hostname>:<port>	Vendor Self Service Applications URL sent with a workflow notification for vendor users.
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.

Option	Required	Level	Setting	Description
PV: Enable Single Column Layout in Additional Details	No	Site Application Responsibility User	Y N	When set to Y (yes), renders the Additional Detail section of the Referral Creation/Detail page in a single column rather than in the standard double-column format. If no value is set, the double-column display is used.

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	Value in the profile controls if all products should be displayed or only products belonging to categories assigned to a partner in the Special Pricing Product Categories field in the partner's profile. The user selects at the product category level. The partner can see all products under that category and subcategories.

Profile Option	Required	Level	Setting	Description
OZF_SP_GRACE_DAYS	Optional	Site Responsibility	Numeric value	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. 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.
OZF_SP_DEFAULT_APPROVER	Optional	Site Responsibility	A user	Specifies a user as the default special pricing request 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.

Profile Option	Required	Level	Setting	Description
OZF_SP_DEFAULT_BUDGET	Optional	Site Responsibility	One or more active, fixed budgets	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). 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. Single budget: Specify the name of the budget (set up in Oracle Trade Management) at the Site level.
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.

B

Lookups

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
- Lookups for Opportunities

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

Lookup Name	Type	Value	Description
PV_TREND_PERIOD_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_REQUIRED	More Information Required
PV_REFERRAL_RETURN_REASON	User	ADDNL_INFO_REQD	Additional Information Required
		OTHERS	Others

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_APPROVAL	Pending Approval
		RETURNED	Returned
OZF_REQUEST_CLASS	System	SOFT_FUND	Soft Fund
		SPECIAL_PRICE	Special Price
OZF_REQUEST_TYPE	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
PV_ATTRIBUTE_STATUS	User	N	Inactive
		Y	Active
PV_PARTNER_TYPE_RANKING	User	END_USER	End user
		OEM	Orig. Equipt. Mfgr.
		PROSPECT	Prospect
		RESELLER	Reseller
		VAD	Value Add Distrib.
PV_ATTR_RESP_MAPPING_ENTITIES	User	PARTNER_PROFILE	Partner Profile
		PARTNER_PERFORMANCE	Partner Performance
		PARTNER_CONTACT	Partner Contact
PV_ATTRIB_RESP_MAP_STATUS	User	INACTIVE	Inactive
		DRAFT	Draft
		ACTIVE	Active
PV_MIGRATION_RUN_MODE	User	EXECUTE	Execute
		EVALUATE	Evaluate

Lookup Name	Type	Value	Description
PV_MTCH_NUM_DT_OPER (Numeric and Date Operators Used in Partner Matching)	User	GREATER_THAN_OR_EQUALS	>=
		LESS_THAN_OR_EQUALS	<=
		LESS_THAN	<
		EQUALS	=
		GREATER_THAN	>
PV_MTCH_TEXT_OPER (Text Operators used in Partner Matching)	User	EQUALS	=

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

Lookup	Type	Value	Description
PV_BENEFIT_STATUS	User	ACTIVE	Active
		INACTIVE	Inactive
		DRAFT	Draft
		FAILED_VALIDATION	Failed Validation
		INACTIVE	Inactive
		PENDING	Pending

Lookup	Type	Value	Description
PV_BENEFIT_ENTITY_STATUS	System	APPROVED	Approved
		AWAITING_FOR_PARTNER_ACCEPTANCE	Waiting for partner acceptance
		CLOSED_BY_VENDOR	Closed by vendor
		CLOSED_DEAD_LEAD	Closed - dead lead
		CLOSED_FEE_PAID	Closed - fee paid
		CLOSED_LOST_OPPTY	Closed - lost opportunity
		COMP_CANCELLED	Compensation cancelled
		DECLINED	Declined
		DRAFT	Draft
		EXPIRED	Expired
		EXTENDED_BY_VENDOR	Extended by vendor
		COMP_BEING_NEGOTIATED	Compensation being negotiated
		PAYMENT_BEING_PROCESSED	Payment being processed
		PENDING_APPROVAL	Pending approval
		PENDING_CUSTOMER_REVIEW	Pending customer review
		PROCESSING_COMPENSATION	Processing compensation
PV_BILL_ADDR_TYPE (Types of Billing Addresses)	Site	BILL_TO_CONTACT	My billing addresses
		BILL_TO_COMPANY	Company's billing address

Lookup	Type	Value	Description
PV_INVITED_BY_TYPE	Site	VENDOR	Vendor
		VAD	Value Added Distributor
PV_MEMBERSHIP_FEE_REQ (Membership fee required)	User	Y	Yes
		N	No
PV_MODE_TYPE	User	PAYMENT	Payment
		CONTRACT	Contract
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_REQUIRED	More Information Required
PV_REFERRAL_RETURN_REASON	User	ADDNL_INFO_REQD	Additional Information Required
		OTHERS	Others

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

Lookup Type Code	Type	Value	Description
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	Cannot Meet Discount Requested
		NEED_MORE_INFO	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

Lookup Type Code	Type	Value	Description
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

Lookups for Opportunities

To implement opportunities, create or verify the lookup settings listed in the following table.

Lookups for Special Pricing

Lookup Type Code	Type	Value	Description
PV_ASSIGNMENT_EVENT (Assignment History Event)	User	OPPTY_WITHDRAW	Opportunity Withdrawn
		OPPTY_TAKEN	Opportunity Taken
		OPPTY_RECYCLE	Opportunity Recycled
		ASSIGN_FAIL	Assignment Failed
		OPPTY_ASSIGN	Opportunity Assigned
		OPPTY_ACCEPT	Opportunity Accepted
		OPPTY_ABANDON	Opportunity Abandoned
		ASSIGN_WITHDRAW	Assignment Withdrawn
		ASSIGN_REJECT	Assignment Rejected
		ASSIGN_ACCEPT	Assignment Accepted
		OPPTY_DECLINE	Opportunity Declined
PV_CM_ASSIGN_RESP	User	CM_APP_FOR_PT .	Approve Assignment and Accept for Partner
		CM_APPROVED	Approve Assignment
		CM_REJECTED	Reject Assignment

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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 E-Business Suite Setup 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. ClickSubmit.
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 set up 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
Synchronize Territory Assignment Rules	Yes	After defining new territories or updating existing territories, the territory administrator must execute this concurrent program. The parameter values for this program must have Partner Management 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. This program can be run in Total mode, Incremental mode, or Date Effective mode. Date Effective mode is used by Oracle Incentive Compensation to determine which salespeople worked on an order. To get the correct answer, you must run the program in date effective mode first. There are four parameters. They are listed below, along with their settings: • Usage: Partner Management • Run Mode: Total Refresh or Incremental Refresh • Start Date: null • End Date: null Responsibility: CRM Administrator

Program	Required	Description
OZF-TM: Generate Party List for Market	Yes	Matches customer orders to offers and populates a denormalized table AMS_PARTY_MARKET_SEGMENTS with customer segmentation information based on territory definitions. This program needs to be run in two situations: • When a new territory is created. Run the program after running the Synchronize Territory Assignment Rules program. • When a new customer is created as the result of a referral. Note: This program must be run after the Synchronize Territory Assignment Rules program and before OZF-TM: Net Accrual Engine to ensure that the net accrual engine accurately matches customer orders to offers. Responsibility: Oracle Trade Management Administrator

Program	Required	Description
PV: Channel Team Assignment for Partners in TOTAL/INCREMENTAL Mode	Yes	Parameter Name: Mode Parameter Values: TOTAL or INCREMENTAL 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. After the hierarchy is set up, run this program to assign channel teams to partners based on the territory hierarchy. You might also want to run this program in the TOTAL mode if your organization makes significant changes to the territory hierarchy. Run this program in INCREMENTAL mode when you have: • Set the profile option PV: Territory Assignment Online is set to No. • Updated any partner's transaction matching attributes from an Oracle application other than Oracle Partner Management. 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. Responsibility: PRM concurrent requests

Program	Required	Description
PV: Define Channel team for specific territories	Yes	Run this concurrent program when there is a change in: • 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). • Territory transaction matching attribute values (for example, when a territory that was originally defined to contain partners in California now contains partners in California, Nevada, and Oregon). This program should be run each time there is a change in the territory setup. Responsibility: PRM concurrent requests

Program	Required	Description
PV: Update Partner Status	Yes	To determine if the status of a partner is active, all the following conditions must be true: 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. 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. This concurrent program needs to be scheduled to update the partner status periodically. *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.* When the concurrent program return status is error or warning, use the concurrent program's log file for additional information. Frequency: Every day (minimum) Responsibility: PRM concurrent requests

Program	Required	Description
Refresh AS period days	Yes	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. To set up the calendar, log into Oracle Forms as the General Ledger Super User and navigate to Setup > Financial > Accounting > Calendar. It is recommended that this program be run once a month. Responsibility: Oracle Sales Administrator
Refresh Multi-Currency Conversion Rate (AS_PERIOD_RATES)	Yes	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. 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. Responsibility: Oracle Sales Administrate

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	Evaluates all approved deal registrations to update the status to one of the following closed or expired statuses: • Closed. Dead Lead • Closed. Lost Opportunity • Closed. Opportunity Won • Expired Responsibility: PRM concurrent requests

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	Sends notifications to partner primary users when either of the following occurs: • 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. It is recommended that you run this program daily. Responsibility: PRM concurrent requests
PV: Expire Ended Program Membership, and Renew Early Renewed Program Memberships	Yes	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. The program also changes a partner's program membership status to Renew for all early renewals with a start date in the past. It is recommended that you run this program daily. Responsibility: PRM concurrent requests

Program	Required	Description
PV: Process the errored enrollment requests for approval	Yes	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). It is recommended that you run this program bi-weekly. Responsibility: PRM concurrent requests

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	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) The parameters of the concurrent program are: Country - Process opportunities only for country specified. User Name - The user that is determined to be the assignment manager for the opportunity routing. From Date - Consider only those opportunities that have been created after this date. Responsibility: PRM concurrent requests

Program	Required	Description
Spatial Information for Locations Batch Update	Yes	Acquire latitude and longitude values for locations in the TCA registry. For addresses that already have spatial data, the program updates the records with the latest information from eLocation. (For more information, see *Oracle Trading Community Architecture eLocation Spatial Data Integration User Guide*.) This is needed for partner matching to determine the radial distances between a customer on the opportunity and the partners. Responsibility: Trading Community Manager
Workflow Background Process - POL Assignment Routing	Yes	Process channel manager time-out and partner time-out activities in opportunity routing. The parameters of the concurrent program are: Item_type: POL Assignment Routing Process Deferred: N Process Timeout: Y Process Stuck: N Responsibility: Workflow Administrator

Program	Required	Description
Workflow Background Process - POL Automated Partner Matching	Yes	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. 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. Item_type: POL Automated Partner Matching Process Deferred: Y Process Timeout: N Process Stuck: N Responsibility: Workflow Administrator
Workflow Background Process - POL NotifyParty	Yes	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. The parameters of the concurrent program are: Item_type: POL Notify Party Process Deferred: Y Process Timeout: N Process Stuck: N Responsibility: Workflow Administrator

Program	Required	Description
PV - External Salesteam Migration	Yes	Organizations that are upgrading from a prior release must run this program. 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. 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. Responsibility: PRM concurrent requests

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	Acquire latitude and longitude values for locations in the TCA registry. For addresses that already have spatial data, the program updates the records with the latest information from eLocation. (For more information, refer to the *Oracle Trading Community Architecture eLocation Spatial Data Integration User Guide*.) This concurrent program needed for the Partner Locator to determine the radial distances between a customer and a partner. Responsibility: Trading Community Manager
PV Refresh Attribute Text Table	Yes	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. There are two options for running this program: full refresh or new partners only refresh. Full refresh is the default. 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. Responsibility: PRM concurrent requests

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 profiles.

Concurrent Programs for Partner Profile Attributes

Program	Required	Description

Program	Required	Description
PV: Partner Type Migration	Yes if migrating from previous release	Earlier you could assign multiple partner types to each partner. Currently, partners can be assigned one partner type only. If you are migrating from a previous release, you must run this concurrent program to perform the data conversion at the time of upgrading to R12. This concurrent program enables customers upgrading to R12 to assign a single partner type to their partners. The partner type is assigned according to the ranking system specified in the PV_PARTNER_TYPE_RANKING lookup table. Note: The ranking in the lookup table is utilized solely by the concurrent program. In R12, no other programs or processes access the data in this table. The two parameters are as follows. Running_Mode: There are two possible values: • Evaluation (default value): Select Evaluation to run the program without making changes to the partner data. This is useful if you want to get an idea of the changes that will be done to your partner data based on the specified ranking of Partner Types. • Execution: Select Execution to upgrade the partner types and store the changes in the underlying database. Overwrite: There are two possible values: • No: If set to No (default value), the program will not overwrite the existing partner type on a partner record. This value is useful if the concurrent program failed (for whatever reason) to complete and you are rerunning it. The rerun will not update those Partner records that have already been processed the first time and will only update those Partner records that have not yet been processed. Setting the value to No also allows the program to run more efficiently.

Program	Required	Description
		• Yes: Set the value to "Yes" if you have modified the ranking of the Partner Types in the PV_PARTNER_TYPE_RANKING table and would like to re-upgrade the data to reflect the changed ranking. Responsibility: PRM concurrent requests
PV: Refresh Partner Trend Values	Yes	Updates partner trend values to enable up to date attribute matching. Retrieves or calculates the partner trend performance measures summarized at a monthly level. The parameters of the concurrent program are: 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 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). 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. Responsibility: PRM concurrent requests

Program	Required	Description
PV Refresh Attribute Text Table	Yes	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. Run it periodically to make sure that the manual partner routing search functions properly. There are two options for running this program: Full Refresh or New Partners Only Refresh. Full Refresh is the default and replaces all the primary key ID's in the table. 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. Responsibility: PRM concurrent requests

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	Matches customer orders to offers and populates a denormalized table AMS_PARTY_MARKET_SEGMENTS with customer segmentation information based on territory definitions. This program needs to be run in two situations: • 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. 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. Responsibility: Oracle Trade Management Administrator

Program	Required	Description
OZF-TM: Net Accrual Engine	Yes	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. 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. 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. Responsibility: Oracle Trade Management Administrator
PV - Update Referral/Deal Status	Yes	Evaluates all approved referrals to update the status to one of the following values: • Closed - Dead Lead • Closed - Lost Opportunity • Closed - Opportunity Won • Expired 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. Responsibility: PRM concurrent requests

Program	Required	Description
PV - Referral Compensation Order Completion	Yes	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. Responsibility: PRM concurrent requests
DQM Staging Program	Yes	Populates the search table against which the DQM process performs queries. You should run this program when a new party (hz_parties) is created. To run the program, you must be able to log in with the Trading Community Manager responsibility. You must provide the following parameters to run the DQM Staging Program for Referral Management: • Number of Workers = 5 • Staging Command = STAGE_ALL_DATA • Continue previous execution = No No additional values need to be set. Responsibility: Trading Community Manager

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

The Channel Administrator has 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

The Channel Manager owns the relationship between the vendor and the partner and bears responsibility for managing and distributing information to partners. He works with the partner, assigns and maintains opportunities, and approves assignments, submitted referrals, special pricing requests, fund requests, and deals. Depending upon

business rules, he may approve or reject opportunities being assigned to partners. The Channel Manager can maintain opportunities depending upon access and business rules.

Channel Manager Dashboard

The channel manager dashboard provides an easy to use, configurable user interface to help you with your day to day responsibilities. It provides 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. After 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 to 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 into 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, the partner 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 wins 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 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 Transactions

Partner transactions are records that partners submit or have access to in the system. Examples of partner transactions are opportunities, referrals, deal registrations, special pricing requests, and orders.

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

A partner user can use the transactional system and request a special price, request

funds, submit referrals, and register deals. She can also request an account via self-service and these requests will be routed to partner administrators for approval. She can manage a user's profile, preferences, view their company profile, manage objects that she has 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 such as leads, opportunities, marketing development funds, referrals, deals, and special pricing.

Prospect

A prospect is a prospective customer who has 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 offer. The partner can submit a referral and receive a percentage of the revenue generated by the sale.

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 Partner Management.

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.

Value Added Distributor (VAD)

A business that buys one or more products from a manufacturer, and adds value to it before reselling to a reseller or consumer.

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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