

Oracle® Partner Management

Vendor User Guide

Release 12.2

Part No. E49028-01

September 2013

Oracle Partner Management Vendor User Guide, Release 12.2

Part No. E49028-01

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Send Us Your Comments

Oracle Partner Management Vendor User Guide, Release 12.2

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Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
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- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

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Preface

Intended Audience

Welcome to Release 12.2 of the *Oracle Partner Management Vendor User Guide*.

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

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Structure

- 1 Introduction to Oracle Partner Management
- 2 Oracle Partner Management Business User Flows
- 3 Channel Manager Dashboard
- 4 Working with Partners
- 5 Program Management
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Related Information Sources

Integration Repository

The Oracle Integration Repository is a compilation of information about the service endpoints exposed by the Oracle E-Business Suite of applications. It provides a complete catalog of Oracle E-Business Suite's business service interfaces. The tool lets users easily discover and deploy the appropriate business service interface for integration with any system, application, or business partner.

The Oracle Integration Repository is shipped as part of the E-Business Suite. As your instance is patched, the repository is automatically updated with content appropriate for the precise revisions of interfaces in your environment.

You can navigate to the Oracle Integration Repository through Oracle E-Business Suite Integrated SOA Gateway.

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 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 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 Marketing User Guide

This guide tells you how to create marketing programs, execute campaigns across multiple customer interaction channels such as Web, email, direct mail, and telemarketing, and monitor the performance of these programs. With Oracle Marketing, you can generate prospective customer lists and assess the effectiveness of these lists, and manage marketing collateral and marketing budgets.

Oracle Partner Management Implementation and Administration Guide

Oracle Partner Management enables vendors to recruit and motivate partners to sell products. You can implement partner dashboards for partners to manage their activities and channel manager dashboards for vendors to manage and monitor partner activities and performance. You can also create partner profiles, set up partner activities, and create partner programs to help train partners and provide incentives and benefits.

Oracle Partner Management Partner User Guide

This guide describes how partners can use the partner dashboard to enroll in programs, access the vendor library, manage membership and renewals, register deals, submit referrals, request marketing funds, and view the status of claims.

Oracle Sales Contracts Implementation and Administration Guide

Oracle Sales Contracts enhances the ability of sales organizations to manage their contracts by adding sophisticated contract management and compliance features to quoting, ordering, and negotiating long-term agreements. You can use the Contract Expert to define rules for creating contracts and reporting policy deviations. This guide describes how to establish contract standards, author and negotiate contracts, and approve, sign, and manage them.

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 Sales User Guide

Oracle Sales enables sales professionals plan and manage the sales process from leads to opportunities to quotes including the tracking of competitors for products within opportunities. It is integrated in the E-Business Suite and optimized for use with wireless. You can use the sales dashboard to view open opportunities, proposals, quotes, top customers, leads by age and by campaign, the latest sales forecast, and your calendar tasks.

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 Section

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 User Interface Standards for Forms-Based Products

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

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 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 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 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 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.

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, *Oracle Partner Management Implementation and Administration Guide*

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.

Oracle Partner Management Business User Flows

This chapter covers the following topics:

- Invite New Partner to Partner Login to Partner Enrollment
- Partner List to Marketing Campaign to Click to Order
- Campaign-Generated Lead to Qualification to Automatic Partner Routing to Order
- Deal Registration to Opportunity
- Referral to Partner Compensation
- Special Pricing Request to Partner Claim
- Fund Request to Partner Claim

Invite New Partner to Partner Login to Partner Enrollment

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

Invite New Partner Business Scenario

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

Mike then decides to offer a 10-percent discount in the enrollment fees for the program. When a new partner user receives the program invitation through e-mail, she logs into the partner dashboard, and enrolls into the program. Once the partner user submits the enrollment request, Mike can approve the partner's membership into the program.

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

Partner List to Marketing Campaign to Click to Order

Using Oracle Partner Management and Oracle Marketing, you can allow partners to participate in a marketing campaign. The channel manager generates a list of partners that he would like to receive the campaign offer. The partners are then sent an email notification describing the campaign. The notification contains a link that takes the partner directly to the vendor's web site, where they can place an order.

Partner List to Marketing Campaign to Click to Order Business Scenario

Mike Driver works at Vision Corporation as a channel manager. Mike realizes that the marketing department has created a new sales campaign that includes the Envoy Deluxe Laptop, which is a popular product for partners that focus on the high tech market. Mike decides to notify these partners about the new campaign so that they can take advantage of the campaign's volume purchasing discount.

Vision extends campaigns to Platinum level partners only. So, Mike logs into Partner Management and creates a search for Platinum partners who have high tech as an industry focus. Mike runs the search, and gets a list of 10 partners. Because marketing campaign notifications are sent via email, he must make sure that the email addresses for the partner contacts are available and correct. When Mike is confident that the email addresses are accurate he reruns the search, clicks Create Partner List and saves the list

Mike now accesses the Campaign Workbench application, and goes to the Campaign Dashboard. From the dashboard, he searches the schedules list for the campaign Volume Discount Laptop Campaign. Mike searches for the partner list he created previously, adds it to the campaign schedule, and saves his changes. Mike then goes to Generate List and clicks Refresh List Status to make sure that any additional changes to the partner data are included. When the target list is generated, the list status changes from Scheduled to Available. The partners are now included in the campaign.

Mike next must associate collateral with the campaign. Mike knows that a cover letter that contains a link to Vision's Web Store is already available. Mike searches for the Partner letter, and then reviews it to make sure that the link to the web site is correct for his partners. Mike sees that it is not, so he changes the site link to point to Vision's Channel Services web store, and applies his changes. He then submits the letter for approval. When the letter is approved, he activates the schedule

Rhonda Sellers is an employee of a partner named Bay Circle Systems. Rhonda receives the campaign email message. She reads the message and decides that the campaign offers her a great discount on a volume purchase of laptops. Using the link in the message, she goes to the Web Store and logs in. She searches for the Envoy Deluxe Laptop. She enters a quantity of 100 laptops (to qualify for a volume discount). She then selects shipping method and a payment option, and places her order.

Campaign-Generated Lead to Qualification to Automatic Partner Routing to Order

In this scenario, a partner is set up as a recipient of opportunities generated by a specific marketing campaign. The lead is entered by a Sales user, qualified as an indirect opportunity, and automatically routed to the partner by the Partner Management routing engine. The partner accepts the opportunity, and then creates a quote for the end customer. Once the customer approves the order, the partner places the order and is also able to periodically check the status of the order.

Campaign-Generated Lead to Qualification to Automatic Partner Routing to Quote to Order Business Scenario

Vision Corporation has developed a fall campaign that offers discounts to customers on products that will be replaced by newer versions. The campaign will be offered to many customers, including small customers that are handled by Vision partners. Vision wants these leads to be sent automatically to a partner or partners.

Mike Driver, a channel manager for Vision Corporation, decides that the number of Indirect opportunities generated by the campaign will probably be able to be handled by one partner, and he decided that Bay Circle Systems is the best fit. Mike logs into Oracle Marketing and locates the campaign. He then goes to the Partners tab, and searches for and adds Bay Circle Systems to the campaign.

Responses to the campaign are being handled by internal sales reps. Lisa Jones is a sales rep at Vision Corporation. She receives a message from Business World, a small customer that is interested in purchasing some of the products from the campaign. Lisa enters the response as an opportunity into Oracle Sales, indicating the customer name and the campaign code. When she saves the opportunity, it is routed automatically to Bay Circle Systems.

Bay Circle Systems can subsequently decide to accept or reject the routed opportunity. Bay Circle Systems accepts the opportunity, and contacts the customer. The customer requests a quote, which Bay Circle sends to them. The customer accepts the quote, and the partner subsequently places the order directly from the quote.

Deal Registration to Opportunity

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

When a partner registers 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 partner's organization for fulfillment.

Deal Registration Business Scenario

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

Rhonda registers the deal. The timeframe for the purchase is within the next month and the total budget is about \$30,000 for 20 new desktops. She enters a note for the reviewers saying that she is registering this deal and believes that the opportunity is already in an advanced status. Vision has configured a deal registration approval policy to automatically route all incoming deal registrations to the partner's channel manager for approval.

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

Mike does not find a duplicate and so he approves the deal. Mike reviews the list of potential customer duplicates and finds that the actual customer record is already defined in the customer database. Mike selects the record and reviews the contact information and selects the actual contact for the lead. Mike approves the deal and anew opportunity is created in the system. Both the partner and the partner contact are assigned to the opportunity on the external sales team. Mike is also assigned to the internal sales team for the opportunity.

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

Referral to Partner Compensation

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, the partner can submit a referral to the vendor and receive a percentage of the revenue.

When a partner submits a referral, it is routed to the appropriate approver(s). Approvers are notified of the referral and they review it and approve, reassign, return,

or decline it. When the referral is approved, the partner receives a commission if an approved referral generates a sale. Commissions are calculated after the customer places the order and the partner is notified about the commission amount. After the partner accepts the amount, the vendor pays the commission.

Referral Management Business Scenario

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

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

Mike Driver is the channel manager for Bay Circle Systems. Mike is notified of Rhonda's referral via e-mail and he reviews it. Mike first checks that the lead is unique and then, using the referral deduplication process, he does not find a similar lead or opportunity. Mike decides that this is a valid lead and approves the referral.

Mike reviews the list of potential customer duplicates and finds the actual customer record. Mike reviews the contact information and finds the actual contact record. The lead that was created when Mike approved the referral is processed through the lead engine to qualify, rank and channel it. Lisa Jones is identified as the owner of the lead based on territory definitions.

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

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

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

Special Pricing Request to Partner Claim

Vendors can extend special pricing to partners to help them meet competitor's prices, move aging inventory, or to meet a bid request. Oracle Partner Management leverages Trade Management's special pricing capability, allowing the vendor to create a budget to fund special pricing requests, track the liability against the budget, and upload the

partner's Point of Sale data, which the partner can then use to submit POS claims.

Special Pricing Business Scenario

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

Rhonda submits her request. Vision has configured a special pricing approval policy to automatically route all incoming requests to the partner's channel manager for approval.

Mike is the channel manager who works at Vision. Mike reviews the special pricing request to determine whether there are any existing requests for the same end-customer deal. Mike decides that there are no existing requests for this particular end-customer deal and approves the request.

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

Vision's credit department is notified of the incoming claim and the claim analyst validates the claim and initiates payment to Bay Circle Systems.

Fund Request to Partner Claim

Vendors can allow partners to participate in marketing programs by allowing them to request marketing development funds. The vendor creates a budget in the Oracle Trade Management application and associates marketing programs and tasks with it. The vendor then makes the funds available to partners, who submit funding requests and, if approved, can be reimbursed for their activities upon completion of their campaign.

Fund Request to Claim Business Scenario

Rhonda Sellers works at Bay Circle Systems, a partner of Vision. Bay Circle Systems has access to channel marketing funds from Vision to support execution of marketing activities agreed upon by Vision and Technology Solutions.

Rhonda submits a fund request into Vision for a specific lead generation activity. Vision has configured a fund request approval policy to automatically route all incoming fund requests to the partner's channel manager for approval.

Mike Driver is the channel manager who works at Vision. Mike is notified of Rhonda's incoming fund request and reviews the request. He links into the Budget tab where he sees the default budget for this MDF benefit. He makes sure that the funds are available. He then reviews the request to make sure that the proposed activity meets

Vision's partner marketing guidelines, and approves the request.

Rhonda receives an e-mail notifying her that her fund request has been approved. Rhonda proceeds with the lead generation activity. When the activity is complete, Rhonda is ready to submit a claim to receive reimbursement. She enters information about the activity results, specifies that she would like payment by check, and enters reimbursement amounts. Rhonda submits a claim.

Vision's credit department is notified of the incoming claim and the claim analyst validates the claim and initiates payment to Bay Circle Systems.

Channel Manager Dashboard

This chapter covers the following topics:

- Overview
- Vendor User Data Visibility
- Customizing Key Performance Indicator Information
- Customizing Shortcuts
- Message Center

Overview

The Channel Manager Dashboard provides you with a 360-degree view of your partners and activities. It includes three main features:

- Key Metrics bin: This section contains charts and graphs that display the sales performance of the partners.
- Shortcuts bin: Use these hyperlinks to access notifications, opportunities, and partner-related benefits.
- Partner Query tool: Use this to perform advanced partner searches based on profile attributes.

For more information about the Channel Manager Dashboard, see the *Partner Management Implementation Guide*.

Vendor User Data Visibility

A vendor user's resource role and permissions determine the partner data seen on the Channel Manager Dashboard. The information available in the Key Metrics bin and Sales Performance graphs is determined by the data visibility of the channel team membership or resource group role. A vendor user is assigned to a channel team

automatically.

The My Partners area lists the results of a partner search. If the PV: Enable Profile Attribute Security profile option is set to Yes at the site level, the permissions for your role and the attributes assigned to your role affect the actions you can take upon the listed partners.

- A Channel Representative can view and update information about the partners that he manages. This includes partner attributes to which this role is assigned.
- A Channel Manager can view and update information about the partners he manages and also partners that are managed by channel representatives in his group. This includes partner attributes to which the channel manager role is assigned.
- A user that has the PV: View All Partners permission can view and update information about partners that he manages directly, but can only view information about partners managed by other users.
- A user that has the PV: Update All Partners permission can view and update information about all partners in the system.
- A user that has the PV: Invite New Partners permission can invite an organization to become a partner.
- A user that has the PV: Partner View Profile Attribute permission can only view seeded and custom partner profile and performance attributes.
- A user that has the PV: Partner Update Profile Attribute permission can view and update seeded and custom partner profile and performance attributes.

Customizing Key Performance Indicator Information

Oracle Partner Management provides several seeded Key Performance Indicators (KPIs) on the Channel Manager Dashboard. It is unlikely that most Channel Managers need to view all of them on their dashboard, so a Channel Manager can display only those KPIs relevant to his business needs. The selected KPIs can also be re-ordered.

The personalization is at the user level, so one Channel Manager's list of KPIs can differ from another's. However, personalization at the Responsibility level is also supported. This enables the administrator to define a subset of KPIs for a specific Responsibility, and a user can further define another subset within that subset.

To customize KPIs, click the Personalize Key Metrics button on the Channel Manager Dashboard and use the shuttle boxes to move the metrics from the Available to the Selected box. You can then rearrange them in the Selected box.

Customizing Shortcuts

The shortcut bin on the Channel Manager dashboard can be customized either at a Site or Responsibility level. As part of the customization effort, the Administrator can hide, relabel and reorder the links. Additionally, the Administrator can add new links to the bin. These links can point to external sites (for example, www.yahoo.com), internal sites (intranet), or to other areas within the Oracle application.

Message Center

You can click a shortcut link on the Vendor User dashboard to view the Message Center. The Message Center informs the user about changes that have occurred regarding the application. These updates include information about:

- Notifications that have been enabled
- Program registration requests
- Concurrent requests
- Program registration requests and assignments
- Vacation information

Working with Partners

This chapter covers the following topics:

- Overview
- Partner Marketing List Business Flow
- Searching for a Partner
- Creating a Partner
- Converting a Customer to a Partner
- Creating a Partner List
- Managing a Partner
- Creating a Partner Contact
- Users and Security

Overview

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

Partner Marketing List Business Flow

The Partner Advanced Search to Marketing List flow involves two primary steps:

- Search Partner
- Partner List

Search Partner

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

Partner List

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

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

Searching for a Partner

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

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

The Personalize Screen is divided into three sections:

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

Use this procedure to enter details for a search criteria.

Navigation

Log in as a channel manager and navigate to Partners Quick Link > Partner Summary, and then click Search or Personalize to display the Partner Search page.

Prerequisites

None.

Notes

- **Partner Information region:** Enter details about the partner that you would base your search upon.
- **Display Options region:** Enter the columns to be displayed after performing a search.
- **Save Search As region:** Enter a name for the search and select the Use As Summary Page Default check box to save it as the default search page.
- **Modify Criteria:** Use to modify the information for your search. You can select or deselect the partner contact and partner attributes that should be present in the search section of the Personalize page. Each attribute has its own defined display style.

Creating a Partner

There are three ways that a partner can be created:

- The vendor invites a partner to enroll into programs.
- A vendor user converts an existing customer to partners.
- A partner can self register using the self-service registration process.

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

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

Use this procedure to invite a new partner to join a partner program

Navigation

Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page and then click Invite New Partner. The Create Partner page appears.

Prerequisites

None.

Notes

- Enter basic information about the partner, including partner type information,

address, and a contact.

- **Partner Type:** Select the appropriate partner type. A partner of type Value Added Distributor (VAD) can be given the ability to set up its own partners as well. You can assign multiple partner types to a single partner.
- **Member Type:** Select the type from the list. A global partner can have subsidiary partners underneath it. A subsidiary of a global program can inherit some of the partner program benefits from a global partner. When you select *Subsidiary*, the Global Partner field is added to the page. You must select the Global organization for the Subsidiary.
- Click **Next**. The Invite Partner page appears. Enter partner program information.
 - Select a program from the Program Name drop-down list. The list that appears is determined by the Partner Type selected for the partner.

Converting a Customer to a Partner

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

Use this procedure to convert existing customers to partners.

Navigation

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

Prerequisites

None.

Notes

- **Customer Name:** Select a customer. The list contains organizations that are currently identified as customers of your organization.

Note: The result of a search query for customers depends on how DQM matching rules are set up.
- **Member Type:** If you select the Subsidiary Member Type, the Global Partner LOV will be enabled.
- **Convert to Partner:** Click to start the conversion process.

Upon conversion, the partner is enrolled in the Default Program, which is specified by the channel administrator during implementation. You can now manage partner contacts and their user information.

Creating a Partner List

Oracle Partner Management integrates with Oracle Marketing to allow vendor users to generate partner lists. Lists can 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. A channel manager can create a partner list if she sees a **Create as List** button on the Partner Summary page.

Use this procedure to create a list.

Navigation

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

Prerequisites

None.

Steps:

1. Personalize your search, view the results, and click **Create as List**.
The Save List page appears.
2. Enter necessary details and click **Save**. You will receive a confirmation message.
3. Click **Show List Details** to view details of the list. You can view details of the list only if you have the appropriate permission.
4. To return to the summary page, click **Return to Partner Summary**.

Managing a Partner

You manage a partner's information in the Update Partner page. The Update Partner page is available via the Update Partner button in the Partner Details page. The Update Partner button is available if you do have privileges to that allow you to update a partner's details. You can access additional information about the partner through various sub tabs displayed on this page.

The Partner Summary page has a seeded search called My Partners, which is the default saved search. It displays partners where the logged in user and his direct and indirect reports are on the partners' channel team. So, you can view partners only if you are a channel manager.

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

For more information on attributes that you can view or update, see Setting up

Performance Tab

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

Trends Tab

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

Transactions Tab

This tab displays a partner's transactions, such as claims, offers, opportunities, orders, referrals, deals, fund requests, and special pricing requests. You can filter the transactions according to status, and you can also drill into the details of the transaction if you have appropriate permissions.

Profile Tab

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

Memberships Tab

This tab displays a partner's memberships and the benefits associated with the membership. From this tab, you can invite the partner to join a partner program and provide discounts on the program membership fee.

Managed Partners Tab

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

Channel Team Tab

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

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

If the Territory Assignment Program does not return any channel manager, and the

logged in user is not a channel manager the Default channel manager is assigned to the channel team.

Notes Tab

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

Interactions Tab

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

Creating a Partner Contact

Partner contacts are people in a partner's organization with whom you interact to perform business transactions. They are extensions of the marketing, sales, and support staffs in a partner's organization.

There is a difference between partner contacts and partner users. Both are created for partner organizations, and a list of contacts can be created for a partner. However, partner users use the Partner Dashboard and are directly involved on a regular basis with the Vendor organization. Partner contacts can also be partner users if they are assigned a username and password.

For example, a salesperson at the partner organization is a partner user, as he needs to access the Partner Dashboard and complete transactions. On the other hand, the partner's legal counsel is listed as a contact because she does not use the application but needs to be identified in case questions arise about program contracts.

A channel manager can create a partner contact or partner user from a partner's Profile tab on the Partner Details page. A partner administrator can create either a contact or user from the Create Contact page in the Profile. In addition, a partner employee can self register to become a partner user.

Use this procedure to create a partner contact.

Navigation

Log in as a channel manager and navigate to Partners Quick Link > Partner Summary page, and then select the Profile tab and click Create Contact. The Create Contact page appears.

Prerequisites

None.

Steps:

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

The Contact Details page appears.

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

The details that you entered are published.

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

The Profile tab displays profile attributes. You can edit attributes and view attribute history. The Address tab displays the contact's address. You can also create an additional mailing address. The Notes tab displays additional free form text information about a partner. You can add additional notes.

For more information on viewing or updating attributes, see Setting Up Attribute Security, *Oracle Partner Management Implementation and Administration Guide*.

Users and Security

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

User Types

- Vendor Users - Employees in the vendor organization who can view partners that they created. An example of a vendor user is a channel manager who is responsible for managing a set of partner.
- Vendor Managers - Employees in the vendor organization who can invite partners to enroll into a program, and view or update partner profile information and partner attributes. This depends on permissions assigned to the role.

Permissions

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

- If the vendor does not have this permission and is not a channel manager, but has the role of a manager in a PRM group and has channel managers reporting to hi, the system brings all partners where the vendor's direct and indirect reports are in the partners' channel team. The user cannot update partner details.
- PV_UPDATE_ALL_PARTNERS:
 - If a vendor user has this permission, the **Update** icon is enabled for all partners displayed in the Partner Summary page.
 - If a vendor user has this permission and is a channel manager, the **Create As List** button is displayed.
 - If a vendor does not have this permission and is not a channel manager, but has the role of a manager in a PRM group and has channel managers reporting to him, the system brings all the partners where the vendor's direct and indirect reports are in the partners' channel team. The logged in user cannot update partner details.
 - If a vendor does not have this permission and is not a channel manager, and does not have a manager role in a PRM group, records are displayed in the Partner Summary page.
- PV_PARTNER_UPDATE_PROFILE_ATTRIBUTE
 - If the PV: Enable Profile Attribute Security profile option is set to Yes, the vendor user with this permission can update the attributes to which this role is assigned.
- PV_PARTNER_VIEW_PROFILE_ATTRIBUTE
 - If the PV: Enable Profile Attribute Security profile option is set to Yes, the vendor user with this permission can view attributes to which this role is assigned but cannot update them.

Program Management

This chapter covers the following topics:

- Overview
- Viewing, Creating, and Updating Partner Programs
- Terminating, Upgrading, and Downgrading Partners
- Inviting a Partner to Join a Program
- Adding Team Members to Partner Programs

Overview

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

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

Viewing, Creating, and Updating Partner Programs

This section describes the processes for creating and approving partner programs and discusses program characteristics.

Creating Partner Programs

You can create programs that provide valuable information, incentives, and promotions to a wide partner community. You must be logged in with the channel manager responsibility. On the Partner Programs page, create a new program and enter program parameters. When finished, submit the program for approval.

Program Type

Program Type refers to the type of program that is set up by the administrator with the approvers hierarchy already set up. This helps the program to be routed for approvals automatically.

Program Level

- If *Program* is selected and the person creating the program is the same as the program owner, the program gets approved.
- If *Membership* 1 is selected, the Membership Fee Required, Membership Duration, Enable VAD Initiated Invitation and Require Global Membership fields are activated.

Start Date and End Date

The start and end dates are defaulted to parent programs dates respectively. Users can still choose a start and end date in between the partners' start and end date.

Copying a Program

You can create a program in one step by copying an existing program. To copy a program, log in as a channel administrator and navigate to Partner Programs > Partner Programs page. Select a program and attributes to copy.

Program Approvals

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

Program Statuses

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

- When a program is created at the Program level and submitted for approval and if the person creating the program and the program owner are the same, the program gets approved. The status of the program changes to Approved. The program can be activated, after which the status of the program changes to Active.

If the person creating the program and the program owner are not the same, the program approver receives a notification indicating that the program is awaiting his

approval. To approve the program, the approver should have the responsibility Workflow User Web Application.

- When a program is created at the Membership level, you must mention whether a membership fee is required and the duration of the membership. At this level, you can also decide if distributors can invite partners to enroll in the program and if a subsidiary partner requires a global membership, to be able to enroll in the program.

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

Program Characteristics

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

Benefits

You can organize and offer specific benefits to partners. Benefits such as sales opportunities, product information, marketing collateral, services, and training can be grouped within a program. Program benefits do not become available to partner users until they enroll in the program and their enrollment is approved.

You can associate numerous benefits with a program:

- **Referrals:** A partner refers business to the vendor and receives compensated if the referral results in closed business.
- **Deal Registrations:** A partner registers a deal with the vendor for noncompetition purposes.
- **Special Pricing Requests:** A partner requests discounts for newly purchased inventory or to move existing inventory.
- **Fund Requests:** A partner can request funding to carry out certain marketing activities.

Requirements

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

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

If you specify that a requirement is mandatory, the program is available only to partners that meet the requirement. If a requirement is not mandatory, partners have

the opportunity to enroll in the program and the channel manager can then approve or deny the enrollment.

Pricing and Payments

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

You can define multiple prices by associating a program with multiple price lists. You must define the price list precedence so the appropriate price is selected. Price lists use the multi currency feature of Oracle Advanced Pricing to select the appropriate price. For more information, see the *Oracle Advanced Pricing User Guide*

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

Inventory Items for Partner Programs

You can associate inventory items with partner programs and price these items. The PV: Enable Auto Creation of Inventory Items option determines whether inventory items are created automatically or manually. Set this option at the Site level. When the profile option is set to Yes, autocreation is enabled, and an inventory item is created automatically for each partner program with a fee. When set to No, autocreation is disabled. In this case, when you create a new program with a fee, you must select an inventory item from the LOV for the program. The inventory items are created and managed through the Oracle Inventory application.

You add inventory items to the program using the Inventory Item list box. The items available for selection are defined by profile options, Oracle Inventory security definitions, and inventory item attributes. You cannot change the price on these pre-existing inventory items in Oracle Partner Management (PRM); however, if autocreation is turned off you can make the price change from within Advanced Pricing. After you activate a program and it has accepted enrollments, you cannot change the inventory items associated with the program.

If the program requires a fee and you manually select an inventory item that does not have pricing information set up, you can still create the program and submit it for approval. However, you cannot activate the program until pricing is created for the program inventory item.

Legal Terms

Oracle Partner Management uses Oracle Contracts to store and manage partner contracts. Oracle Partner Management integrates with Oracle Contracts to provide the terms and conditions that can be associated with membership in a partner program. For a contract to be available in Oracle Partner Management, you must create a contract template under the 'Partner Contracts' category and attach it to a program. When a partner's enrollment is approved, a new contract is automatically created from the

template. The contract is presented in the session language for the logged in partner user; however partners can view the contract in another language.

Integration with Contracts Core provides Partner Management with a repository, or library, of contract templates and clauses. Clauses can be associated with one or more contract templates. Contracts provide a contract and clause approval mechanism, through Oracle Workflow Builder, that allows the customer to better control the content of terms and conditions.

The delivered contract response options are *Accept*, *Reject*, and *Print and Fax*. You can configure the contract responses at a global or geographic level to meet business needs; for example, to allow only online contract acceptance, you can disable the Print and Fax option. *Reject* must always be an option and is not configurable.

Partner Management lets you specify the contract response rules based on partner geography. Integration with Oracle Contracts provides numerous benefits for Partner Management customers. For example, a clause can be associated with more than one contract, which greatly reduces the amount of time spent by a contract administrator entering and subsequently maintaining terms and conditions. In addition, customers gain increased flexibility in how they can build templates, as they can add, remove, and rearrange clauses easily. The Contracts integration also gives customers the ability to create localized versions of a contract. This is an important enhancement for customers who 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, contract response options can also be governed by local or regional regulations, and allowing customers to create geographic-based contract response options provides them with the ability to comply with these regulations.

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

Enrollment Questionnaire

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

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

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

Program Summary

You can create a summary of the program, which reflects details of a program. The summary is HTML content that is displayed to partners to help them understand program requirements, benefits, and so on. The summary can be the setup type, name, program start and end dates, owner, partner type, country, language, and description. The program summary information is stored in the Oracle Content Management application. Oracle Content Management and Oracle Partner Management are integrated so that the program summary information created in Oracle Partner Management is stored in Oracle Content Management; channel managers do not need to access Oracle Content Management directly.

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

Approval Checklist

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

Upgrade Rules

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

Notifications

Notifications contain messages that can request users to take some action and/or provide users with information. Different types of notifications are attached to a program. Notifications are configured at the 'membership' level, under the Notifications side navigation link.

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

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

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

The different notifications are:

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

Terminating, Upgrading, and Downgrading Partners

The list of enrolled partners, under the Tracking menu, enables you to view information for enrolled partners such as contact, program status, and start and end dates. You can select one or more partners and issue an offer to change their membership level.

Partners are notified if they have an offer to upgrade or downgrade from one program or membership level to another, for enrollment. Partners are also notified when they are invited to enroll into a new program. You can select all partners for a specified program and upgrade, downgrade, terminate or send new invitations within the same program.

Sending a notification to a partner for the Upgrade, Downgrade, Terminate, New Invites process, depends upon the 'Do Not Send Message to Partner(s)' check box value.

Terminate Partners

To forcefully terminate an enrolled partner from a given membership level program, select a reason for termination. A message is stored in the history log, and the partner and contract are terminated immediately. Primary users in the partner organization are informed of the termination.

Downgrade Partners

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

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

Upgrade Partners

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

Inviting a Partner to Join a Program

The Invite New Partner to Partner Login to Partner Enrollment Flow involves the following steps:

- Invite New Partner
- Partner Login
- Partner Enrollment

Invite New Partner

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

You can attach discounts to invitations, either to the enrollment fee of the program or

membership level program. The discount can be an amount value or percentage off the enrollment fee.

Partner Login

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

Partner Enrollment

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

Adding Team Members to Partner Programs

You can add team members to a partner program. Expand the Collaboration menu, enter the team members, and select a User/Role for each team member. Available options for User/Role are *User* and *Team*.

Partner Program Enrollments

This chapter covers the following topics:

- Overview
- Enrollment Requests
- Approving Enrollment Requests

Overview

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

Enrollment Requests

This section provides an overview of the enrollment request process and describes the detailed information on enrollment requests.

Enrollment Request Process

Programs that a partner is eligible to enroll in appear in the Available Programs bin in the Partner Dashboard. Once a partner user initiates the enrollment process, she is guided through a series of steps to provide information about the partner organization, agree to legal terms of program membership, and submit billing and payment information.

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

- A vendor administrator can view pending enrollment requests.

- A channel manager can only view enrollment requests submitted by his partners.
- An approver can view details of an enrollment request and make a decision on the enrollment request. Details include information about the partner's company, questionnaire details, contract and payment details, benefits and approval check list.

An enrollment request consists of:

- **Enrollment Request Details:** The enrollment request details is a summary of the information submitted by the partner for enrollment.
- **Enrollment Request Summary:** The enrollment request summary lists the summary of pending approvals. You can review the list of enrollment requests for a program and also search for enrollment requests.

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

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

- **Enrollment Log:** The enrollment log captures events pertaining to an enrollment request and events such as change of statuses or change of information.

Enrollment Request Details

The enrollment request details page contains a header, responses to questions associated with the request, contract information, payment information, and a summary of the benefits associated with program membership.

Header Information

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

Questionnaire Details

This section contains the current status of the enrollment form. The form submitted is measured against requirements of a program. Oracle Partner Management automatically grades answers submitted by the partner against requirements defined for a program and assigns one of the following statuses:

- **Passed Qualification:** The partner has passed all the qualification questions for the program.
- **Failed Qualifications:** The partner has failed at least one or more qualification

questions for the program.

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

The channel manager can modify any of the partner attributes except:

- Performance attributes
- Derived attributes
- External attributes, with the exception of Customer Annual Revenue

Contract

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

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

You can change the contract status of an enrollment request.

Payment

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

Benefits

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

Approval Checklist

If an approval checklist is defined for the program, the Enrollment Details screen provides access to the checklist. The checklist can be enforced depending on the settings in the program or membership level definition. You can view the Enrollment Log to see events such as change of status or information.

Approving Enrollment Requests

The approval process for partner program enrollment requests is set up and maintained through the Oracle Approvals Management application.

Approval Workflow

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

You can have parallel approval for partner program enrollment requests. This means that the request can be routed to a group of approvers. In most companies, more than one person is empowered to approve or decline Referrals and Deals. Thus, routing a Referral or Deal to multiple approvers simultaneously (parallel routing) can more closely matches a company's internal business processes. Parallel routing also prevents a transaction from being stuck in the approval queue when an approver is either busy or on vacation.

You can also use role-based approval routing. This feature enables companies to define the "Role" (Channel Manager or Channel Representative) that should act as the approver, rather than a group of users, eliminating the need to know the names of the approvers while defining the approval rules. The list of users belonging to a Role is evaluated every time an approval action takes place, so any changes to a Role are reflected immediately.

When a program enrollment form is submitted for approval, the partner user who submitted the enrollment request is notified about the status of the request. Partners whose enrollment requests are approved receive the benefits of the new program. These privileges are reflected when the partner logs into the partner dashboard.

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

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

When you reject a request, the enrollment status changes.

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

Parallel Approvals

Requests can be routed to a number of approvers who can approve the request in parallel. All approvers who are notified of an request, regardless of whether or not it is sent out in a parallel or serial fashion, can view the enrollment after any action is taken.

Approval Procedure

Use this procedure to approve an enrollment.

Navigation

Log in with the channel manager responsibility and navigate to Message Center Quick Link > Message Center page. Then, select an enrollment request that requires approval to view the Enrollment Request Details page for the request.

Prerequisites

None.

Request Information: Request more information about the enrollment request and click Submit.

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

- When you approve the request, the partner is enrolled into the program.
- When you reject the request, the partner is notified.

Opportunity Management

This chapter covers the following topics:

- Overview
- Business Flow
- Opportunity Matching and Routing
- Searching for Opportunities
- Working with Opportunities - Oracle Sales Offline Integration
- Working with Opportunities - Oracle Sales Integration
- Routing Statuses
- Users and Security

Overview

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

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

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

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

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

Oracle Partner Management integrates with Oracle sales applications to provide

opportunity management functionality. Oracle Partner Management integrates with two different sales applications: Oracle Sales Offline (which is also called Oracle Field Sales) and Oracle Sales. There are some functional differences between the two applications. When using this chapter, make sure to refer to the procedures for your organization's Oracle sales implementation.

Business Flow

The following steps are included in the Lead to Opportunity to Quote to Order flow:

- Lead import and processing
- Opportunity matching and routing
- Offering opportunities
- Partner accepts opportunity
- Partner creates quote

Lead Import and Processing

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

Opportunity Matching and Routing

Once the opportunity is created, a vendor user can match it to the most appropriate partner. The user can choose to use automated matching to identify the best partner or partners for the opportunity, or he can perform manual matching:

- **Manual matching:** You can match opportunities by selecting a preferred partner or you can perform a search using partner profile attributes to identify the best partner independently of established matching rules. You can select criteria that are used to search for potential partner matches for an opportunity. The criteria can be limited by responsibility.
- **Automated matching:** There are three kinds of automatic matching. The partner matching engine matches partners to opportunities based on rules set up by the channel administrator. With semi-automatic matching, the user is responsible for routing the opportunity to the partners that have been identified as appropriate recipients of the opportunity. With fully automated matching, no user intervention occurs. With automatic background matching, no user intervention occurs. Automatic background matching is used for opportunities that resulted from the lead to opportunity conversion process.

To implement automatic background matching, the channel manager creates matching

rules that contain partner routing criteria (routing criteria is optional for other types of matching). Two profile options must be set up. See the Partner Management Implementation Guide for details.

The vendor user can decide whether to route the opportunity to one partner or multiple partners. 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.
- **Serial or Single-Serial:** The opportunity is offered to one partner at a time from a list.
- **Multiple-Parallel or First Come First Serve:** The opportunity is routed to multiple partners simultaneously. The first partner to accept the opportunity wins it.
- **Multiple Joint or Joint:** The opportunity is offered to multiple partners for fulfillment, and multiple partners can accept and work jointly on it.

Channel Manager Approval

While routing an opportunity to a partner, the vendor user may be able to choose whether or not the channel manager must approve the routing assignment. Depending on an organization's business requirements, channel manager approval might always be required, might never be required, or may be optional.

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

Offering Opportunities

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

The channel administrator can set up partner timeouts, which limit the time that the partner can hold on to an offered opportunity. If the partner does not respond within that time frame, the opportunity is routed to another partner. Mail alerts are triggered to inform relevant parties that the offer has timed out.

Partner Accepts Opportunity

After a partner contact accepts an opportunity, she can access the additional information about the opportunity and add more users to the team for that opportunity. All designated contacts in the partner organization are given access to details about the opportunity, with the authority to update the details. Additional sales people from the

partner organization can be given access by adding them to the sales team. The partner sales team can work on the opportunity, updating the details when required and work the opportunity to its conclusion. At the end of the process the opportunity is closed and e-mail alerts are sent again to inform relevant parties.

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

Partner Creates Quote

Once a partner contact accepts the opportunity, she can create a quote or a proposal for the customer and publish it to the customer. The partner contact can add products to the quote and select the price list for the quote, and then submit it for approval to the vendor.

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

Opportunity Matching and Routing

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

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

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.

Fully-automatic

With fully-automated 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. Fully-automatic matching requires that the channel administrator set up at least one matching rule.

Automatic Background

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

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

To implement automatic background matching, the channel manager creates matching rules that contain partner routing criteria (routing criteria is optional for other types of matching).

The matching engine determines which rule to use for a particular opportunity based on whether the opportunity's information matches the opportunity matching criteria contained in the rule. Depending on how the channel administrator has set up matching, the engine will do one of the following:

- Evaluate the opportunity matching criteria for each rule before selecting the rule to use.
- Stop at the first rule that contains opportunity matching criteria that matches that of the opportunity.

Routing Types

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

- **Single:** An opportunity is routed to one partner only. If multiple partners have been identified as potential matches, the "winner" is selected randomly.
- **Serial or Single-Serial:** When the matching rules identified more than one partner for an opportunity, the opportunity is offered to one partner at a time from the list. If the highest ranking partner declines it, the opportunity is offered to the second ranking partner and so on until a partner accepts it. Once a partner accepts the opportunity, partners further down in ranking do not see the opportunity.

- **Multiple-Parallel or First Come First Serve:** You can also route the opportunity to multiple partners simultaneously. The first partner to accept the opportunity wins it, and the other partners are removed from the opportunity. If you want to do multiple matching, you need to select at least two partners from the partner list.
- **Multiple Joint or Joint:** This option supports collaborative selling. The opportunity is offered to multiple partners for fulfillment, and multiple partners can accept and work jointly to win and fulfill the opportunity.

Manual Matching

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

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

Searching for Opportunities

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

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

Working with Opportunities - Oracle Sales Offline Integration

This section describes how to use opportunity management to accomplish some basic tasks. Use the procedures in this section if your organization is using Oracle Sales Offline to manage its direct sales channel.

Creating an Indirect Opportunity

Use this procedure to create an opportunity.

Navigation

Log in as a channel manager and click the Opportunities Quick Link to display the Opportunity Summary page. Then, click Create to view the Create Opportunity page.

Prerequisites

None.

Notes

- **Budget:** Enter the budget amount for this opportunity, if known.
- **Sales Methodology:** Select the Sales Methodology to be used with this opportunity, if appropriate. Click the eyeglass icon to view additional information about the selected sales methodology.
- **Select a project:** Allows you to link the opportunity to an existing project.
- **Key Competitor:** If the opportunity involves a competitive situation, the name of the key competitor can be recorded.

Assigning an Opportunity

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

Navigation

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

Prerequisites

An indirect opportunity must exist.

Steps:

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

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

5. Select a routing type using the Routing Type drop-down list.
6. Select the By-pass CM Approval check box to bypass the channel manager's approval.

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

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

If you are the channel manager, you can submit and approve the routing without the need to sign on again.
7. Click **Submit Routing**.

The status of the opportunity changes to Matched.

Adding Partners to the External Sales Team

You can add a partner to the external sales team without assigning the opportunity to the partner. Unless the opportunity is assigned to a partner, the partner's users will not be able to view the opportunity.

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

Navigation

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

Prerequisites

None.

Steps:

1. Click the link for an opportunity with an Unassigned status.

The Opportunity Details page appears.
2. Click the Sales Team > External side navigation link.

The Opportunity: abc page appears.
3. Add a partner as an external sales team member by clicking Go and selecting the partner.
4. Add a contact as an external sales team member by clicking Go and selecting the contact.
5. Click Update to save your changes.

Approving an Opportunity Assignment

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

Navigation

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

Use this procedure to approve an opportunity assignment.

Prerequisites

An indirect opportunity in the routing status Matched must exist.

Steps:

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

Withdrawing an Opportunity Assignment

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

Use this procedure to withdraw an opportunity.

Navigation

Log in as a channel manager and click the Opportunities Quick Link.

Prerequisites

An indirect opportunity in the routing status Offered must exist.

Steps:

1. Look for an opportunity you routed to a partner and click the Opportunity link. The Routing status is Offered.
The Opportunity: abc page appears.
2. Review the opportunity and click the Partner side navigation link.
3. Click **Withdraw Routing** to withdraw the routing.

Working with Opportunities - Oracle Sales Integration

This section describes how to use opportunity management to accomplish some basic tasks. Use the procedures in this section if your organization is using Oracle Sales to manage its direct sales channel.

Because most of the information that is included in opportunity management is created and stored in the Oracle Sales application, some of the procedures in this section refer to Oracle Sales instead of Oracle Partner Management. Refer to the *Oracle Sales User Guide* for additional information.

Viewing, Creating, and Updating an Opportunity

This section both describes the information that can be associated with an opportunity record and provides information to help you create a new or update an existing opportunity.

Viewing Opportunities

The Opportunity Views page displays views that you can select to display your data. This page enables you to review and update a specific group of opportunities. To see a summary of a particular opportunity, click the radio button in the Select column. This refreshes the page with the selected opportunity's summary details. You can update the details that appear on the summary page. If you need to update additional opportunity information, click the opportunity name to access the Update Opportunity page.

Click **Simple Search** to access the simple search page. To see a different view, select the view name from the View menu and click **Go**.

Click **Export** to download the list of opportunities to a file with a .csv extension that you can use in a spreadsheet application.

Creating or Updating an Opportunity

The information described in this section applies to the Create Opportunity and Update Opportunity pages. To save changes made to these pages, click **Apply**.

Notes

- **Methodology:** Captures your sales group's best practices. These steps assist you in

making sales. For more information, refer to Sales Methodologies in the *Oracle Sales User Guide*.

- **Stage:** The stage in the sales methodology for the opportunity. Stages are related to the win probability values.
- **Win Probability:** The chance of winning the opportunity, expressed as a percentage. Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability). Lower numbers imply opportunities with a lesser chance of closing; higher numbers imply a greater chance of closing the opportunity with a win.
- **Sales Channel:** The sales channel assigned to the opportunity. For opportunities that will be routed to partners, an indirect channel should be selected.
- **Response Channel:** The source for the opportunity, such as Fax or Email.
- **Referral:** Links to the Referral Details page. Appears if the opportunity has a related referral. The field is enabled through Personalization.
- **Customer:** Click Select to select or change the customer for the opportunity.
- **Address:** Customer address for the opportunity. After you create an opportunity, the address defaults to the primary address for the customer. However, you can select another address for the opportunity besides the primary address.
- **Status:** The status of the opportunity, for example, Preliminary, On-Hold, or Won. The status interacts with the Close Reason field.
- **Close Reason:** The reason an opportunity was closed, such as Won Opportunity. You can not specify a close reason without first specifying a close status.
- **Amount:** The total opportunity amount.
- **Forecast Amount:** The forecast amount, which is distributed to the individual product forecast based on proportion. For example: Existing Opportunity Forecast: 100
Existing Product Forecast Line 1: 20
Existing Product Forecast Line 2: 80
If you change the opportunity forecast amount to 200, the result would be: New Opportunity Forecast: 200
New Product Forecast Line 1: 40
New Product Forecast Line 2: 160

Customer Analysis Tab

The Customer Analysis tab contains the following:

- **Products Under Contract:** Displays the product category of products for which your customers have service contracts. The product category name can be expanded to list the nested levels of product categories and items. The amount shown is the

value of the service for products in that category that are under the service contract. The amounts roll up to the first level of the product hierarchy.

- **Recent Opportunities:** Displays the previous opportunities for the customer.
- **Service Summary:** Displays the total number of open service requests, the number of escalations, and the average days to close service requests that have the severity levels of High, Medium, or Low.
- **Service Request Backlog:** Displays a brief description of the customer's problem, its severity level, whether the problem was escalated, and the number of days the issue has been open.

Notes and Tasks Tab

From this tab you can read and create notes about the opportunity. You can also create tasks that are associated with the opportunity and add attachments to the opportunity.

Contacts Tab

The Contacts tab contains the following:

- **Suggested Contacts:** Displays contacts that are suggested as likely contacts for this opportunity, based on previous opportunities with the same product category and customers. Click the Add to Selected Contacts icon to add a suggested contact to the Selected Contacts for the opportunity.
- **Selected Contacts:** Displays the contacts for this opportunity. Select the Primary checkbox if this contact is the primary contact for the opportunity. Click the Remove icon to delete the contact from the Selected Contacts list.

To view additional details about a contact, select View Details and click **Go**.

You can create a task for yourself related to a contact by selecting a contact name, selecting Create Task, and then clicking **Go**.

Products Tab

The Products Tab displays the products associated with the opportunity. Select a product to view details about it.

Notes

- **Revenue:** Depending on your organization's business requirements, the revenue table may be available in the Products tab. The table displays the Forecast Owner for the product and the Sales Group in which the products are forecasted. Viewing revenue information enables forecasting for individual products within a single opportunity, even if the products are the responsibility of several sales representatives.
- **Non-Revenue:** Depending on your organization's business requirements, the non-revenue table may be available in the Products tab. The non-revenue table

displays the sales representatives who perform non-revenue forecasts. Click Add Person to add non-revenue forecast owners and their sales groups.

- **Competitors:** Displays the name of competitors, competitor products, and the win/loss status (None, Won, Lost). Click the Remove icon to delete a competitor from the list.

Sales Cycle Tab

The Sales Cycle tab is available if there is a sales methodology associated with the opportunity. The Sales Cycle tab displays the sales stages of the sales cycle as defined for your organization's Sales Methodologies.

Click **View Worksheet** to display the Sales Coach worksheet for the selected stage or step in a text editor.

Sales Team Tab

The Sales Team tab displays the sales team members for the opportunity.

Notes

- **Full Access checkbox:** Determines whether the team member can update or only view the opportunity. The default value is selected.
- **Contributor checkbox:** Enables you to specify if a sales team member has contributed effort (not revenue) to this opportunity. This is an optional field, and can be enabled by the channel administrator using the Personalization feature.
- **Owner checkbox:** Determines which sales team member owns the opportunity. Only one owner can be specified for an opportunity.
- **Do Not Reassign checkbox:** Determines if the sales team member can be reassigned automatically when changes are made to the Partner Management territory hierarchy. If the checkbox is selected, the team member will remain on the sales team even if changes are made to the Partner Management territory. By default, the checkbox is unselected, unless the team member is the opportunity owner.

Proposals and Quotes Tab

The Proposals and Quotes tab contains the following:

- **Proposal:** Displays proposals that have been created for the opportunity.
Click **Create Proposal** to create a new proposal for the opportunity. Oracle Partner Management integrates with Oracle Proposals to create and manage proposals. Refer to the *Oracle Proposals User Guide* for more information.
- **Quotes:** Displays quotes that have been created for the opportunity.
Click **Create Quote** to create a new quote for the opportunity. Oracle Partner Management integrates with Oracle Quoting to create and manage quotes. Refer to the *Oracle Quoting User Guide* for more information.

- **Projects:** Depending on your organization's business requirements, the Projects table may be available. The Projects table displays projects associated with the opportunity. Oracle Projects enables project managers to manage the schedule, resources, finances, issues, and other aspects of their projects. Oracle Partner Sales integrates with Oracle Projects to enable projects to be created and to capture the costs related to the pursuit of opportunities. See the *Oracle Projects User Guide* for more information.

Partner Tab

The Partner tab displays information about an opportunity's routing status and partners who are working on the opportunity. The page contains two regions:

- **Assignment Details:** Provides information about an opportunity's assignment status. Click the assignment status to view details about the opportunity's assignment history. If an opportunity has been routed, the Assignment Type field reflects the routing type used for the opportunity.
- **Partners:** Displays information about the partners to whom the opportunity has been routed or who are currently working on the opportunity.

Before the opportunity is routed to or accepted by a partner or partners (that is, the assignment status is Unassigned), the Add Partner, Add Preferred Partner, Generate Partner List, and Go buttons are available. The channel manager can create a list of partners who are eligible to receive the opportunity by clicking Generate Partner List, Add Partner, or Add Preferred partner (refer to Assigning an Opportunity to a Partner for more information).

While an opportunity's status is Unassigned, the channel manager can adjust the default partner rankings, if appropriate.

The Withdraw Assignment button becomes available when an opportunity's assignment status is Pending Approval, Offered, or Active.

The Approve Assignment drop-down list appears when an opportunity's status is Pending Approval. It allows the channel manager to approve or reject the partner matching choice(s).

After the opportunity has been routed, the buttons are no longer visible, and partner rankings become static. Once the opportunity has been accepted, the list displays only those partners that are actively working on the opportunity.

Assigning an Opportunity to a Partner

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

Navigation

Log in as a channel manager and navigate to Opportunities Quick Link > View Opportunities page, and select an opportunity that has not been routed to a partner. From the Update Opportunity page, click the Partner tab.

Prerequisites

An indirect opportunity must exist.

Notes:

- **Generate Partner List:** Click to generate a list of partners that are eligible to receive the opportunity. Depending upon how your organization has set up matching, you might be required to select the matching rule that you will use to identify partners for the opportunity. If you do not have the ability to select a matching rule, the application uses a specified rule. Matching rules evaluate criteria on the opportunity against partner profile information. The name of the rule used is displayed on the page that displays the list of eligible partners.

Depending on the type of routing that you will use, select one or more partners from the resulting list.

- **Add Partner:** Click to perform an ad hoc search to identify a partner or partners for the opportunity. The search criteria that is available for you for partner matching is determined by your responsibility, and can be changed, if needed, by the channel administrator.
- **Add Preferred Partner:** Click to add a list of preferred partners.
- **Submit Assignment:** Select the routing type that will be used to distribute the opportunity to partners.
- **Requires Channel Manager Approval:** Depending on your organization's business requirements, you may be able to choose to require channel manager approval of the opportunity routing, or to bypass approval.
- **Go:** Click to initiate the routing of the opportunity to partners. The Assignment field changes to reflect the current status of the opportunity routing process. The Assignment Type field reflects the routing type that you selected in the Submit Assignment field.
- **Assignment Status:** Click the current status to access the Opportunity Assignment History page, which provides information about the events associated with the opportunity's assignment history.

Approving an Opportunity Assignment

If you are a channel manager and an opportunity is routed to a partner that you manage, you may be required to approve or reject the opportunity assignment.

When an opportunity assignment approval has been routed to you, you receive a notification, from which you can navigate to the Update Opportunity page and approve or reject the assignment.

Creating a Quote

You can create a quote for an opportunity. Oracle Partner Management uses the functionality of Oracle Quoting to create and manage quotes associated with opportunities. For complete information about creating quotes, refer to the *Oracle Quoting User Guide*.

To create a quote for an opportunity, navigate to the opportunity's Update Opportunity page, and select the Proposals and Quotes tab. Click Create Quote to display the Create Quote from Opportunity page. Some of the fields are populated automatically with information from the opportunity, including:

- Opportunity name (becomes the quote name)
- Customer Name
- Customer Address
- Currency
- Sales Channel
- Source Name

Closing an Opportunity

Select a close status in the Status field, and select a Close Reason. Click **Save**.

Viewing Opportunity History

To access history, click **View History** on the Update Opportunity page.

View Information on the Opportunity History Page

You can view the history of an opportunity as it flows through the sales cycle. This history helps you make decisions about further action with the opportunity. The history includes opportunity header, product, and non-revenue product information. Opportunity history is available through personalization performed by your system administrator.

Notes

- **Updated Date From/To:** Enables you to search for and view opportunity history that occurs between specific dates.
- **Updated By:** Source for the update. Records displayed can be filtered by this source name.
- **Field:** The name of the field that has changed. You can filter the records displayed

by selecting the field name of the changed field you want to display.

- **Old Value:** Value for the changed field before it was changed.
- **New Value:** Current value for the changed field.

Withdrawing an Opportunity

If you decide that an opportunity's routing is inaccurate, you can withdraw the opportunity from the partner(s). When you withdraw an opportunity, all partners are removed from the routing.

To withdraw an opportunity, navigate to the opportunity's Update Opportunity page, and then display the Partner tab. Click **Withdraw Routing**; the opportunity's assignment status changes to Withdrawn.

Routing Statuses

The following table indicates the different routing statuses of an opportunity.

Routing Statuses

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

Users and Security

Access to opportunities is restricted by user types and permissions.

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

Referral Management

This chapter covers the following topics:

- Overview
- Referral Management Business Flow
- Searching for a Referral
- Creating a Referral Request for a Partner
- Managing Referrals
- Approving a Referral
- Returning a Referral Request for More Information
- Reassigning or Declining a Referral
- Using DQM Tools to Deduplicate Customer and Contact Data
- Processing Compensation
- Viewing the Referral Log
- Referral Statuses
- Users and Security

Overview

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 one of the vendors products that the partner does not sell. In this scenario, the partner can submit a referral to the vendor and receive a percentage of the revenue.

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

to the partner for acceptance. After partners accept the compensation, the vendor pays the commission.

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

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

Referral Management Business Flow

The Referral to Partner Compensation flow involves the following steps:

- Referral request is submitted by partner
- Referral request is approved by a channel manager and a DQM approver
- A lead or opportunity is created
- Commission is calculated and payment is processed

Request Submission

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

Request Approval

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

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

The approval process includes two steps:

- Verify the data
- Check for duplicate records

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

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

the approver approves the referral after viewing the details.

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

Reassign Request

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

Decline Request

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

Data Quality Management (DQM) Approval

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

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

Duplicate Customers

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

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

Duplicate Contacts

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

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

Lead/Opportunity Created

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

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

Commission Calculation and Payment Processing

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

Searching for a Referral

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

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

Creating a Referral Request for a Partner

Use this procedure to create and submit a referral request on behalf of a partner.

Navigation

Log in as a channel manager and navigate to Referrals Quick Link > Referrals page. Then select the referral benefit from the Create drop-down list and click Go. The Create Referral page appears.

Prerequisites

None.

Notes

- Provide a referral name, and then select the partner and the partner contact. The partners that appear on the list are enrolled in a partner program that offers the referral benefit selected. The partner contact will receive notifications about the referral.
- Enter details in the Customer and Contact Information region.
Enter an organization name, select a country from the drop-down list and click **Go**. The list of countries available in the drop-down list is dependent on the referral

initiative you selected. If a country is not listed, click **Cancel** to navigate back to the Referrals page and select the appropriate initiative. The address fields change to reflect the address format valid for the country selected. Enter the address information.

- Enter product categories for the referral in the Products region.

The list of products available is determined by the referral benefit selected. The unit price of all the products selected for the referral must be greater than or equal to the threshold amount specified in the referral benefit for the matching geographic region.

- Select a currency for the products.

This becomes the currency displayed on the lead or opportunity record once the referral request is approved.

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

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

- To save a draft without submitting, click **Save**.
- To save and submit for approval, click **Submit**.

Managing Referrals

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

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

You can evaluate a referral and approve or decline it.

Approving a Referral

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

Requests can be routed to a number of approvers who can approve the request in

parallel. All approvers who are notified of an request, regardless of whether or not it is sent out in a parallel or serial fashion, can view the enrollment after any action is taken.

Use this procedure to approve a referral.

Navigation

Log in as an vendor user who is a referral request approver and navigate to Message Center Link or Referrals Quick Link > Referrals page.

Prerequisites

None.

Steps:

1. Click the **Update** icon for a referral.
The Referral Details page appears.
2. Review the referral details. Once you decide the data entered by the partner is valid and this is a potential good lead, click **Continue** to review potential duplicates.
The Referral Duplicates page appears. If the system has not found potential duplicates, the Approve button is displayed, indicating that the referral is ready for approval.
3. Review the potential duplicates.
The system displays open leads, opportunities and referrals on similar customer records and product categories. If you find a duplicate record, select the record and click **Link and Decline** or **Link and Accept**.
4. If the referral is not a duplicate referral, click **Accept**. If the approver is also the customer approver, the user goes through the customer deduplication process. Otherwise, the next approver is notified. If there is no additional approver, the referral is approved automatically. The status changes to Pending Customer Dedup if the system finds potential duplicates.

Returning a Referral Request for More Information

If an approver realizes that he cannot make the approve/decline decision based on the details supplied, he can return the Referral to the submitter for additional information or clarification. This is done by clicking the Return Request button on the Referral Approval: Data Review page. The original submitter accesses the returned Referral and views the reason for the return. A notification can be set up, if necessary. The original submitter updates the Referral with requested information and resubmits the transaction, and the Referral goes through the approval process again.

Reassigning or Declining a Referral

A vendor user can reassign and decline referrals that have been submitted to her for approval. Reassigning allows the user to select another referral approver to complete the referral approval process.

Use this procedure to reassign or decline a referral.

Navigation

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

Prerequisites

None.

Steps:

1. Select the referral and click **Update**.

The Referral Details page appears.

2. Decline or reassign the referral:

- Click **Decline**. You can also link the referral to another referral and approve or decline it.
- Click **Reassign** to reassign the referral to another approver. The Reassign page appears.

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

The list of approvers displays all channel managers.

Using DQM Tools to Deduplicate Customer and Contact Data

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

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

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

- If there are no matches for the person specified (via DQM), a new person with a contact relationship with the specified customer is automatically created by the system.

- If there are possible customer matches, the referral status changes to Pending Customer Dedup after the referral approver has approved a submitted referral. The DQM approver is notified and can review the matches to review the organization and merge with an existing organization or choose to create a new customer.
- If there are possible person matches, the DQM approver can review the matches and select an existing contact relationship in the system or choose to create a new contact.

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

Navigation

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

You can approve referrals from either the Message Center or the Referral Summary page. Navigating via the Message Center Link provides you a list of open notifications.

Prerequisites

A referral with the status Pending Customer Dedup must exist.

Steps:

1. In the Referral Detail page, click **Continue**.
Potential duplicate customers are displayed.
2. If you find a duplicate, select the record and click **Use Existing Organization**.
If the system finds a duplicate contact, choose between Use Existing Contact or Create New Contact.
3. If you do not find a duplicate customer, click **Create New Organization**. The system creates a new record using the information entered by the partner in the customer fields. In addition, a new contact is created using information entered by the partner.

Processing Compensation

A partner's request for compensation for a successful referral must be processed through the Oracle Trade Management application. A channel manager receives notification when a claim has been created for a partner. Refer to the *Oracle Trade Management User Guide* for additional information on completing claim processing.

Viewing the Referral Log

The referral log tracks the history of the referral. To view the referrals log, navigate to Referrals Quick Link > Referrals, and then select the referral. From the Referral Details page, click the Log tab to view the log information.

Referral Statuses

The following table provides information on different statuses.

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

Referral Statuses

Technical Name	Status
APPROVED	Approved
APPRVD_PENDNG_CSTM_R_DQM	Pending Customer Review
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_FEE_PAID	Closed. Fee Paid
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
COMP_AWAIT_PRT_ACCEPT	Awaiting For Partner Acceptance
COMP_CANCELLED	Compensation Cancelled
COMP_INITIATED	Processing Compensation
COMP_BEING_NEGOTIATED	Negotiating Compensation
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor

Technical Name	Status
MANUAL_EXTEND	Extended by Vendor
PAYMENT_BEING_PROCESSED	Payment Being Processed
SUBMITTED_FOR_APPROVAL	Pending Approval

Users and Security

Access to referrals are controlled based on 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] - Allows a vendor user to view and update all referrals and allows a partner user to view and update all

referrals owned by their organization.

- Compensation Approver - [PV_REF_COMP_APPROVER] - This permission enables partners to view and accept compensation for referrals.

Note that users who are granted access to all leads and opportunities within the sales application can access all referrals that generated a lead or an opportunity.

Deal Registration

This chapter covers the following topics:

- Overview
- Deal Registration Process
- Deal Registration Request Information
- Approving a Deal Registration Request
- Reassigning or Declining a Deal Registration
- Returning a Deal Registration Request
- Creating a Deal Registration Request for a Partner
- Managing Deal Registrations
- Using DQM Tools to Deduplicate Customer and Contact Data
- Deal Registration History and Statuses

Overview

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

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

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

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

Deal Registration Process

The Deal Registration to Opportunity flow contains the following steps:

- Request submission

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

Vendors can also create and submit requests on behalf of customers.

- Request approval

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

The approver can approve, deny, reassign, or return the request for additional information.

- Data quality management (DQM) approval

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

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

- Opportunity created and routed to partner

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

- Opportunity won and closed

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

When an activity triggers a notification, an appropriate entry is stored in the deal request log.

Deal Registration Request Information

Approving a Deal Registration Request

The approval process includes two steps:

- Verify the data

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

- Check for duplicate records

If a duplicate deal exists, select the deal and link it with the deal submitted by the partner. If a duplicate deal does not exist, view the details and approve the deal.

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

If the customer or contact exists, select the existing customer or contact. If not, create a new customer or contact. The system links the customer and contact with the deal.

Requests can be routed to a number of approvers who can approve the request in parallel. All approvers who are notified of an request, regardless of whether or not it is sent out in a parallel or serial fashion, can view the request after any action is taken.

Use this procedure to approve a deal registration.

Navigation

Log in as an vendor user who is a referral request approver and navigate to Message Center Link or Referrals Shortcut > Referrals page.

Prerequisites

None.

Steps:

1. Click the **Update** icon for a request.

The Referral Details page appears.

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

The Referral Duplicates page appears. If the system has not found potential duplicates, the Approve button is displayed, indicating that the referral is ready for approval.

3. Review the potential duplicates.

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

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

Reassigning or Declining a Deal Registration

A vendor user can reassign and decline deal registrations that have been submitted to her for approval. Reassigning allows the user to select another referral approver to complete the referral approval process.

Use this procedure to reassign or decline a deal registration request.

Navigation

Log in as a channel manager and navigate to Referrals Shortcut > Referrals page.

Prerequisites

None.

Steps:

1. Select the deal registration request and click **Update**.

The Deal Registration Details page appears.

2. Decline or reassign the deal registration:

- When you decline a deal registration you can link the referral to another referral.
- Click **Reassign** to reassign the referral to another approver. The Reassign page appears.

When you decline or reassign a deal request, the appropriate parties are notified by workflow.

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

The list of approvers displays all channel managers.

Returning a Deal Registration Request

You can return a deal registration request when there is insufficient information for you to approve the request.

Navigation

Log in as a channel manager and navigate to the Deal Request summary page.

Steps:

1. Click the Return Request button to access the Return Request page.
2. Select a reason, add a comment if appropriate, and click Apply.

The partner is notified of the return.

Creating a Deal Registration Request for a Partner

Use this procedure to create and submit a deal registration request on behalf of a partner.

Navigation

Log in as a channel manager and navigate to Deal Registrations Shortcut > Deal Registration page. Select the deal benefit from the Create drop-down list and click Go. The Create Deal Registration page appears.

Prerequisites

None.

- Provide a deal registration name, and then select the partner and the partner contact. The partners that appear in the list are enrolled in a partner program that offers the deal registration benefit selected. The partner contact will receive notifications about the deal registration.
- Enter details in the Customer and Contact Information.

Enter an organization name, select a country from the drop-down list and click **Go**. The list of countries available in the drop-down list is dependent on the deal registration benefit selected. If a country is not listed, click **Cancel** to navigate back to the Deal Registration page and select the appropriate benefit. The address fields change to reflect the address format valid for the country selected. Enter the address information.
- Select product categories for the deal in the Products region.

The list of products available is determined by the deal registration benefit selected. The unit price of all the products selected for the deal registration must be greater

than or equal to the threshold amount specified on the deal registration benefit for the matching geographic region.

- Select a currency for the products.

This currency becomes the current displayed on the opportunity once the deal registration request is approved.

- Enter notes in the Notes region by selecting a note type from the Note Type drop-down list. Select a value from the Visibility drop-down list to make the note private, internal, or public.
- To save without submitting, click **Save**.
- To save and submit for approval, click **Submit**.

Managing Deal Registrations

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

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

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

Using DQM Tools to Deduplicate Customer and Contact Data

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

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

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

- If there are possible person matches, the DQM approver can review the matches and select an existing contact relationship in the system or choose to create a new contact.

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

Navigation

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

You can approve deal registration request from either the Message Center or the Referral Summary page. Navigating via the Message Center link provides you a list of open notifications.

Prerequisites

A deal registration request with the status Pending Customer Dedup must exist.

Steps:

1. In the Deal Registrations page, click **Continue**.

Potential duplicate customers are displayed.

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

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

3. If you do not find a duplicate customer, click **Create New Organization**.

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

Deal Registration History and Statuses

This table lists deal registration statuses. Notifications are sent when the deal status changes and a history of the actions that trigger a status change is kept in the Log section of the deal request.

Technical Name	Status
APPROVED	Deal is approved
APPRVD_PENDNG_CSTMTR_DQM	Pending Customer Review

Technical Name	Status
CLOSED_DEAD_LEAD	Closed. Dead Lead
CLOSED_LOST_OPPTY	Closed. Lost Opportunity
CLOSED_OPPTY_WON	Closed. Opportunity Won
DECLINED	Declined
DRAFT	Draft
EXPIRED	Expired
MANUAL_CLOSE	Closed by Vendor
MANUAL_EXTEND	Extended by Vendor
SUBMITTED_FOR_APPROVAL	Pending Approval

Special Pricing Management

This chapter covers the following topics:

- Overview
- Special Pricing Business Flow
- Searching for a Special Pricing Request
- Creating a Special Pricing Request for a Partner
- Exporting Special Pricing Data
- Approving, Declining, and Reassigning a Special Pricing Request
- Using DQM Tools to Deduplicate Customer Data
- Creating a Claim for a Partner
- Submitting a POS file
- Special Pricing Request Statuses
- Claim Statuses
- Users and Security

Overview

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

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

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

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

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

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

Special Pricing Business Flow

The Special Pricing Request to Partner Claim flow contains the following steps:

- Request submission
- Request approval
- Claim submission
- Claim validation

Request Submission

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

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

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

A partner can request special pricing for two scenarios:

- **Existing inventory:** When a partner has already bought the product and wants a discount for past purchases. When they request for a special price and you approve it, they can proceed to make the sale to the end-customer and claim the discounted

amount by providing you the proof of sale.

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

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

The following table describes different types of requests.

Request Types

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

Request Approval

When a partner submits a special pricing request, the approver reviews the request and approves, reassigns, or declines the request.

When a request is submitted, Oracle Workflow routes the request to the appropriate vendor approver. Workflow manages the entire approval process and notifications can

be configured to be sent as soon as the request is approved, reassigned, or declined. Oracle Workflow is driven by Oracle Approval Management. (AME)

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

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

- Special Pricing Request Approval
- Budget Request Approval

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

Special Pricing Request Approval

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

The settings are:

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

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

Similar Requests

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

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

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

Budget Request Approval

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

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

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

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

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

Data Quality Management (DQM) Approval

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

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

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

Duplicate Records

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

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

Offers

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

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

There are three types of offers:

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

Accrual Offer

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

Off-Invoice Offer

If the special pricing request is being fulfilled from new inventory, the discounted amount can be paid to the partner off the invoice. If you specify an off-invoice offer type, the partner does not have to submit a claim.

When the partner makes a sale from new inventory, a unique offer number will be generated and displayed in the user interface. When requests are approved with off-invoice offers or accrual offers, this offer number can be used while placing orders.

Scan Data Offer

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

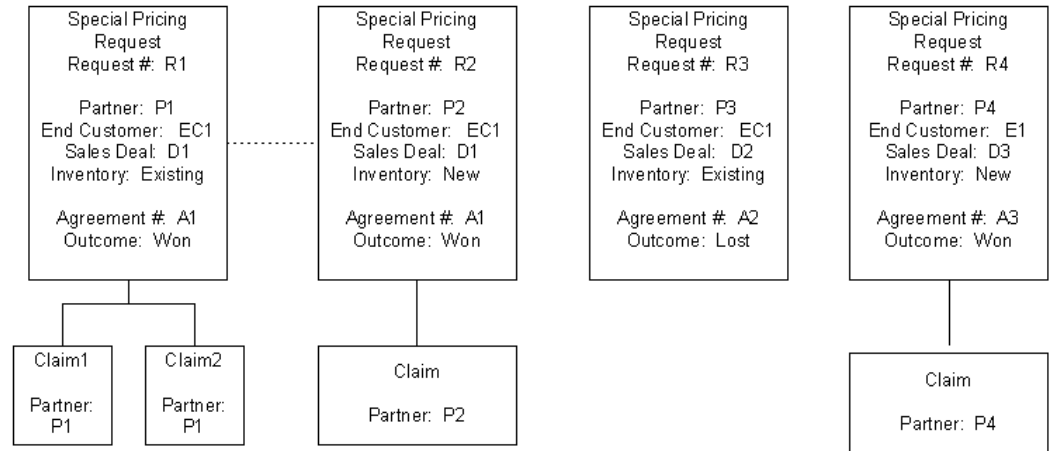
When the partner makes a sale from existing inventory, the offer number is the same as the agreement number displayed in the user interface.

Relationships between Special Pricing Requests and Claims

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

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

for a request. During approval, if requests are linked, the same Agreement number A1 will be used for all requests that are linked to each other.



Partners can only view requests and claims for their organization or for themselves.

Special Pricing Liability

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

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

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

Reassign Request

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

Decline Request

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

If you are an approver and determine that information is missing, you can decline the request and add a note clarifying what information is missing. The partner can provide

information that is missing and resubmit the request. When a partner resubmits the request after providing additional information, the request is routed to the first level approver and continues through the approval process.

Claims Submission

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

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

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

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

For information on submitting special pricing claims information within a POS file, see Submitting a POS file.

Claim Validation

When you submit a claim, the status of the claim is Open. (In Oracle Trade Management) If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. The payment method is based on the profile (of the partner) set in Oracle Trade Management. After the approver approves the claim, the system initiates payment.

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

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

Searching for a Special Pricing Request

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

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

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

Creating a Special Pricing Request for a Partner

Use this procedure to submit a special pricing request on behalf of a partner.

Navigation

Log in as a channel manager and navigate to Special Pricing Requests Quick Link > Special Pricing Requests page and click Create.

Prerequisites

None.

Steps:

1. Provide the name of the partner (in the Distributor field) and select a partner contact.
2. Select a value from the Request Type drop-down list. The Request Types are:
 - **Meet Competitor Price:** Use this to request discounted pricing to match a competitor's price.
 - **Bid Request:** Use this to request discounted pricing on a particular end customer deal.
 - **Blanket Request:** Use this to request discounted pricing when the partner has not been able to move inventory from his/her warehouse.
3. Select the Ship from Stock check box if the partner is going to fulfill the special pricing deal with products from their existing inventory.

If the partner is going to order new products to fulfill the special pricing deal, do not select this check box.
4. The Outcome field indicates the status of the sales deal. In the Outcome field, you

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

5. Click **Continue**. The Products, Notes, and Attachments regions appear. In addition, if the Request Type is Bid Request, the End-Customer Details region appears. If the Request Type is Meet Competitor Price, both the Resellers and the End-Customer Details regions appear.
6. In the Products region, enter details about the product(s) for which you want a discount. Select a product, specify the quantity, unit of measure, the regular price of the product, discount amount, and the discount type. The discount types are:
 - Discount Percentage
 - Discount Amount
 - New Price
7. Enter End-Customer and Reseller information, if appropriate.
8. Optionally, you can enter details in the Attachments and Notes regions.
9. Click **Save** to save the request without submitting it.
10. Click **Submit** to submit the request for approval.

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

Exporting Special Pricing Data

Special pricing data can be exported from the Special Pricing Request page to a comma-separated value (CSV) format file by clicking Export. Before exporting the data, a user can personalize the view to display the appropriate information. The CSV format file can be opened in Microsoft Excel or another spreadsheet or database application.

Approving, Declining, and Reassigning a Special Pricing Request

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

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

Navigation

Log in as a vendor user who is a special pricing request approver and navigate to the message Center link or Special Pricing Quick Link > Special Pricing page.

Prerequisites

A special pricing request has been submitted.

Steps:

1. Select a request with the Pending Approval status and click **Update**.

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

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

3. You can reassign or decline the request at this point.

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

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

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

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

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

The Approve Request: Evaluate Similar Requests page appears.

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

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

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

7. Click Approve **Approve** to approve the request.
The Approve Request: Pricing page appears.
8. If the request is from new inventory, you can see the Offer Type field.
The values are: Accrual and Off-Invoice. If you specify an Accrual Offer type, the partner has to submit a claim. If you specify an off-invoice offer type, the partner does not have to submit a claim.
9. Enter details in the Approved Type, Approved Amount, Maximum Quantity and Minimum Quantity fields.
If you have linked similar requests, the system automatically populates the approved price, minimum and maximum quantities, and the end date from the existing request into the request undergoing approval.
10. Click **Apply** to confirm.

Using DQM Tools to Deduplicate Customer Data

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

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

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

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

Navigation

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

Prerequisites

None.

Steps:

1. Select a request where the value in the Customer Data Merged column is No and

click **Update**.

The Special Pricing Request: Details page appears.

2. Click **Continue**.

Potential duplicate records are displayed.

3. In the End Customer region, select a record and click **Merge**.

4. If you find a duplicate end customer or reseller, click **Use Existing Organization**.

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

Creating a Claim for a Partner

On behalf of partners, you can submit claims manually or in bulk. After you have submitted the claim, the claims administrator can view the claim and resolve the claim.

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

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

Use this procedure to submit a claim manually.

Navigation

Log in as a channel manager and navigate to Special Pricing Requests Quick Link > Special Pricing Requests page.

Prerequisites

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

Steps:

1. Select a request for which you want to submit a claim and click **Submit Claim**.

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

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

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

The Pay to field is automatically populated with the name of the organization who is submitting the claim.
3. Select a value from the Payment Method LOV.

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

The Products region displays product details.
4. Enter other necessary details and enter values in the Sale Date, Quantity Sold and Claim Amount fields.
5. Click **Recalculate** to calculate the claim amount automatically based on the discount amount and quantity entered.
6. Optionally, you can enter details in the Attachments and Notes region and submit your claim.
7. To save a draft without submitting click **Save**.
8. To save and submit for approval click **Submit**.
9. Click **Confirm** to confirm the submission.

Submitting a POS file

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

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

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

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

- Flat Files (.csv files) - You can submit the POS file in the form of .csv files. You can import these files into Oracle Trade Management by using the upload tool provided

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

- Paper documents - You can submit the POS file in the form of paper documents such as paper receipts. You can convert these paper documents into electronic format and upload the data by using the upload tool provided by Oracle WebADI.
- EDI or XML - You can submit the POS file as an electronic file.

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

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

Navigation

Log in to Oracle Trade Management with the Oracle Trade Management User responsibility and navigate to Indirect Sales Management > Chargeback, and then click Import Batch to display the Select Layout Page. The Select Layout Page is actually part of the Oracle WebADI application.

Prerequisites

None.

Steps:

1. Select Trade Management: Resale Layout from the Layout drop-down list and click **Next**. The Select Content page appears.

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

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

- If you select Text File as content, for the Select Text files section:
 1. Select Text file from the local directory that has the data to upload into Oracle Application Indirect Sales Management Interface Tables.
 2. Select one of the Delimiter that is used in the Text file.
 3. Enter the number for the line where the actual data starts, skip the line that has the header. For example, if the header is at line 1 and data starts from line 2, enter 2 in the Start Importing at Line Number field.
 - If you select Text File as content, for the Select Mapping section:
 1. If you select Trade Management: Resale Layout, select Text File Map mapping.
 2. If you select Trade Management: Resale Text Layout, select Text Entry Map mapping.
4. Click **Next** to navigate to the Document Creation Review Page.
 5. Review the entries and click **Create Document**.
An excel sheet is created and populated with data when Download and Text File content are selected.
 6. If you select Download content, update the data.
 7. If you select None, enter data in the excel sheet.
 8. Once data is entered, updated or downloaded from the text file in the excel sheet, select Oracle from the menu and select Upload.
A status monitor page appears with Upload and Cancel buttons.
 9. Click **Upload**.
The status appears on the page indicating the upload status and importer status.
The importer validates data uploaded into Oracle Application Interface Tables.
For more information, see the *Oracle Trade Management User Guide*.

Special Pricing Request Statuses

The following table provides information on special pricing request statuses. You can configure notifications to be sent based on any status change so that all users are immediately notified via e-mail of any activity they should be aware of.

Special Pricing Request Statuses

Status	Description
Draft	The special pricing request has been created but has not yet been submitted.
Pending Approval	The special pricing request has been submitted and is awaiting approval.
Approved	The special pricing request has been approved.
Declined	The special pricing request has been declined.
Closed	The date is greater than the waiting period specified in the Grade Period system profile. The Grace Period profile controls how long users have to submit claims for a particular special pricing request after it's end date. Once the grace period is over, the status of the special pricing request changes to 'Closed' and users cannot submit claims for that particular request.

Claim Statuses

The following table describes various claim statuses.

Claim Statuses

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

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

Users and Security

Access to requests are restricted by user types and permissions.

User Types

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

Permissions

- Super User Permission - [OZF_SPECIAL_PRICING_SUPERUSER] - Allows a

vendor user to view, update, approve and perform DQM on all special pricing requests. Also allows a vendor user to edit the End Date of a special pricing request. Allows a partner user to view and update all special pricing requests owned by their organization.

- DQM Permission - [OZF_SPECIAL_PRICING_DQM] - Allows a vendor user to view, update and perform DQM on all special pricing requests.

Partner Funds Management

This chapter covers the following topics:

- Overview
- Fund Request Business Flow
- Searching for a Fund Request
- Creating a Fund Request for a Partner
- Exporting Partner Fund Data
- Approving or Declining or Reassigning or Returning a Fund Request
- Submitting a Claim for a Partner
- Fund Request Statuses
- Claim Statuses
- Users and Security

Overview

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

You can set up a program benefit that enables partner users enrolled in that program to request channel marketing funds. When a partner user submits a request, it gets routed to the appropriate approver(s). Approvers will be notified of the request and they review the request and approve, reassign, decline, or return the request. When a request

is approved and the partner user executes the marketing activity, he/she can submit a claim to redeem money from you. The claim will be routed to the claim approver who will then validate the claim. When the claim gets approved, you can make the payment to the partner user as credit or can issue a check. The system enables you to measure the effectiveness of your channel marketing expenditures by capturing expected performance on incoming requests and actual performance on the claims.

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

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

Fund Request Business Flow

The Fund Request to Partner Claim flow includes the following steps:

- Request submission
- Request approval
- Claims submission
- Claims validation

Request Submission

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

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

Request Approval

When a partner user applies for funds to execute marketing activities, the approver

reviews the request and approves, reassigns, declines or returns the request.

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

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

The approval of a fund request includes two approval flows:

- Fund Request Approval
- Budget Request Approval

Fund Request Approval

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

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

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

The settings are:

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

Budget Request Approval

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

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

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

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

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

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

Partner Funds Liability

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

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

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

Reassign Request

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

Return Request

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

After the partner user puts the collateral together he/she resubmits the request to the first level approver and attaches the collateral or mails or faxes the collateral. Regardless of whether the request is being submitted for the first time or resubmitted with collateral attached or missing information filled in, the request is routed to the first level approver. Once the first level approver approves the request, it is sent to the next level

approver and continues through the approval process.

Decline Request

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

Claims Submission

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

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

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

Claims Validation

When you submit a claim, the status of the claim is Open in Oracle Trade Management. If it is a valid claim, the approver approves the claim. If the claim is not valid, the approver declines the claim. You can see claim statuses when you log into the system. You can link into the claim, add notes, and add attachments. The payment method is based on the profile (of the partner user) set in Oracle Trade Management. After the approver approves the claim, the system initiates payment.

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

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

Searching for a Fund Request

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

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

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

Creating a Fund Request for a Partner

Use this procedure to submit a fund request on behalf of a partner user.

Navigation

Log in as a channel manager and navigate to Fund Request Quick Link > Fund Requests page and click Create to display the Create Fund Request. The Create Fund Request page appears. The status and request number of the request will be automatically populated and the status of the request will be Draft.

Prerequisites

None.

Steps:

1. Provide the following information at the Create Fund: Definition page:
 - **Partner and requestor:** The Requestor becomes the partner contact for the request, and will receive notifications related to the request.
 - **Benefit:** Select the benefit used for the request. The benefits that are available for a partner are determined by the partner's program memberships. If a default benefit has been set up, it is available as well.
 - **Activity:** Select a marketing activity for which funding is being requested, and then enter a name and description of the activity in the Request Name and Description fields.
 - **Amount requested:** The requested amount is the amount being requested from the vendor to fund the marketing activity. The requested amount will be broken out to the expense level within the Expense Breakdown section.
 - **Partner Contribution:** A partner's contribution is how much the partner's company will contribute towards the marketing activity.
2. Click **Continue** and provide the following additional information:
 - **Expense Breakdown:** This is the breakdown of expenses for the marketing activity. The Total Amount is the amount requested plus the partner user's contribution, for example, you may only fund 50% of the total amount. The line items appearing within the Expense Breakdown are based on the Activity you selected.

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

For example, if a partner has requested \$1000 and plans to contribute \$200, the

Total amount of the fund request is \$1200. In the Expense Breakdown region, if the activity is Advertising, you can break down the funding request, and request \$600 for banners and \$400 for posters.

- **Performance Objectives:** This is the outcome that is expected after executing the marketing activity. This information will enable you to measure the effectiveness of marketing expenditures by tracking expected performance on the requests and actual performance on the claim.
 - **Products:** These products are the products or product categories that will be promoted by the marketing activity.
 - **Geography:** Enter the geographical regions where the marketing activity will be executed.
3. Click **Confirm** to submit the request.

Exporting Partner Fund Data

Partner fund data can be exported from the Partner Fund Request page to a comma-separated value (CSV) format file by clicking Export. Before exporting the data, a user can personalize the view to display the appropriate information. The CSV format file can be opened in Microsoft Excel or another spreadsheet or database application.

Approving or Declining or Reassigning or Returning a Fund Request

You can approve funding requests from either the Message Center or the Partner Funds page. Navigating via the Message Center Link provides you a list of open notifications, and you can navigate to a funding request from there. You can view the notification indicating that a funding request has been submitted for your approval.

Use this procedure to approve, decline, or reassign a request via the Fund Request Quick Link.

Navigation

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

Prerequisites

A fund request has been submitted and you are designated as an approver for fund requests. If you are an approver, the Budget tab is available for your use.

Steps:

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

The Fund Request Approval page appears.

2. After reviewing the request, decline, reassign, or return the request, or continue through the approval process:
 - Click **Decline** to decline the request. In the Decline Fund Request page, select a decline reason from the list and enter comments, as required. The partner user can view this information and take necessary action.
 - Click **Reassign** to reassign the request to another approver. The new approver will receive a notification about the request, and can then take appropriate action.
 - Click **Return** to return the request to the partner. In the Return Request page, select a return reason and enter comments that explain why you are returning the request. The partner user can view this information and take necessary action. For example, you can return the request because additional information is necessary for approval.
3. If you are approving the request, click **Approve**.

The Request Approval page appears.
4. Enter the amount that you are approving and add comments, if appropriate.
5. Click **Continue** to confirm the approval.

Submitting a Claim for a Partner

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

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

Use this procedure to submit a claim.

Navigation

Log in as a channel manager and navigate to Fund Requests Quick Link > Fund Requests page.

Prerequisites

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

Steps:

1. Select the funding request for which you want to submit a claim and click **Submit Claim**.

The Create Claim page appears.

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

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

2. Select a value from the Payment Type drop-down list.

The payment types are credit memo or check.

3. Enter details in the Expense Breakdown region.

This is the breakdown of expenses for the marketing activity. The Total amount is the total amount that a partner has requested for the marketing activity. This value should match the Total amount of the fund request. The Requested Amount is the amount requested for each activity. The Available Amount displays the amount that has not yet been claimed for each expense item. You can enter the Claim Amount for each expense item.

4. Enter details in the Performance Objectives region.

These are the actual results for the marketing activity. This information will enable you to measure the effectiveness of marketing expenditures by tracking expected performance on requests and actual performance on the claim.

5. Click **Save** to save your claim and submit it later or click **Submit** to submit the claim.

Fund Request Statuses

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

Fund Request Statuses

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

Claim Statuses

The following table describes various claim statuses.

Claim Statuses

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

Claim Status	Description
Approved	The claim approver approves the claim.
Pending Close	The claim is pending settlement.
Duplicate	The claim approver finds that a similar claim has been submitted for a request.
Rejected	If the claim information submitted does not match the original request, the claim approver can decline the claim.
Closed	The claimed amount has been paid out to the partner user.

Users and Security

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

User Types

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

Permissions

- Super User Permission - [OZF_FUND_REQUEST_SUPERUSER] - Allows a vendor

user to view, update, and approve all fund requests.

Glossary

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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