

Oracle CRM On Demand

Oracle CRM On Demand for Partner Relationship Management Configuration Guide Release 39

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.oracle.com/>.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program website](#).

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Accessible Oracle Support](#) if you are hearing impaired.

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1 What's New in This Release

What's New in Oracle CRM On Demand for Partner Relationship Management Configuration Guide, Release 39

No new features have been added to this guide for this release. This guide has been updated to reflect only product version changes.

2 Overview of Oracle CRM On Demand for Partner Relationship Management

Overview of Oracle CRM On Demand for Partner Relationship Management

This chapter provides an overview of Oracle CRM On Demand for Partner Relationship Management. It includes the following topics:

- [About This Guide](#)
- [About Partner Relationship Management](#)

About This Guide

This guide describes how to configure Oracle CRM On Demand for Partner Relationship Management and provides details of suggested page layouts and roles that you can set up to support partner relationship management. Your company's requirements might differ from the settings suggested in this guide.

This guide also provides examples of tasks and processes that are typically performed by users in Oracle CRM On Demand for Partner Relationship Management. Your company can customize the tasks and processes to support your business requirements. For more information about administering and using Oracle CRM On Demand, see *Oracle CRM On Demand Online Help*.

About Partner Relationship Management

A *partner*, *partner channel*, or *partner organization* is an external company or a person at a company that sells or services products belonging to the brand owner. Oracle CRM On Demand for Partner Relationship Management supports brand owners in managing their partner relationships. It improves the brand owners' ability to manage partners, partner programs, leads, deal registrations, opportunities, funds, fund requests, training, and certification.

Using Oracle CRM On Demand for Partner Relationship Management, you can manage the following:

- Partner accounts and profiling
- Partner programs
- Leads
- Service requests
- Business plans
- Objectives

- Opportunities
- Deal registrations
- Content (solutions)
- Market development fund requests
- Special pricing authorizations and requests
- Partner self-administration
- Training and certification

3 Getting Started

Getting Started

This chapter describes the initial tasks that must be completed before you begin to configure Oracle CRM On Demand for Partner Relationship Management. It includes the following topics:

- [Provisioning Oracle CRM On Demand for Partner Relationship Management](#)
- [Record Types for Oracle CRM On Demand for Partner Relationship Management](#)

Provisioning Oracle CRM On Demand for Partner Relationship Management

If your company plans to use Oracle CRM On Demand for Partner Relationship Management, then your first task is to contact Oracle CRM On Demand Customer Care and ask a representative to set up your company to use Oracle CRM On Demand for Partner Relationship Management. The initial setup process, which is referred to as *provisioning*, makes available Web pages, record types, features, and fields, which can differ from the standard edition of Oracle CRM On Demand for Partner Relationship Management but are relevant to your business.

Record Types for Oracle CRM On Demand for Partner Relationship Management

When Customer Care provisions Oracle CRM On Demand for Partner Relationship Management for your company, they add the following record types to Oracle CRM On Demand:

- Accreditation
- Certification
- Course
- Deal Registration
- Deal Registration Product Revenue
- Exam
- Partner
- Partner Program
- Fund
- Fund Request

-
- MDF Request
 - Special Pricing Request
 - Special Pricing Product
 - Price List
 - Price List Line Item

Customer Care also creates the PRM administrator access profiles and the PRM Administrator role, and assigns this role to your company administrator. This role gives company administrators the privileges and access options that they require to do the following:

- Configure Oracle CRM On Demand for Partner Relationship Management.
- Create other roles.
- Grant the same privileges and access options to other roles, as required.

For more information on these configuration tasks, see [Configuring Oracle CRM On Demand for Partner Relationship Management](#).

Customer Care can also set up other features in Oracle CRM On Demand for Partner Relationship Management, including the following:

- Custom objects
- How your company accesses Oracle CRM On Demand
- How your company manages large volumes of data

4 Configuring Oracle CRM On Demand for Partner Relationship Management

Configuring Oracle CRM On Demand for Partner Relationship Management

This chapter describes how to configure Oracle CRM On Demand for Partner Relationship Management. It includes the following topics:

- [About Configuring Oracle CRM On Demand for Partner Relationship Management](#)
- [Migrating Fund Requests from Previous Releases](#)
- [About the Shared Address Functionality](#)
- [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#)
- [Setting Up Page Layouts](#)
- [Page Layout Configurations for the Channel Manager Role](#)
- [Page Layout Modifications for the Partner Sales Representative Role](#)
- [Setting Up Access Profiles for Partner Roles](#)
- [Access Profile Settings for the Channel Manager Role](#)
- [Access Profile Settings for the Partner Sales Representative Role](#)
- [Access Profile Settings for the Partner Administrator Role](#)
- [Creating Partner Roles](#)
- [Role Settings for the Channel Manager Role](#)
- [Role Settings for the Partner Sales Representative Role](#)
- [Role Settings for the Partner Administrator Role](#)
- [Adding Partner Users](#)
- [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#)

About Configuring Oracle CRM On Demand for Partner Relationship Management

This chapter provides suggested configurations for certain roles in Oracle CRM On Demand for Partner Relationship Management, including page layouts and access profiles for those roles. It also describes the following:

- How to configure books and workflow rules for Oracle CRM On Demand for Partner Relationship Management

- How to add and manage users (that is, partner users) for Oracle CRM On Demand for Partner Relationship Management

Your company requirements might differ from the settings suggested in this chapter.

Configuring Oracle CRM On Demand for Partner Relationship Management for your company involves setting up user roles, users, books, and workflow rules.

The PRM administrator can set up as many roles as are required to support the brand owner's business processes. The configuration settings described in this chapter are the suggested settings for the following roles in Oracle CRM On Demand for Partner Relationship Management:

- **Channel Manager role.** You typically assign the Channel Manager role to one or more users in the brand owner company who are responsible for maintaining the relationship between the partner organizations and the brand owner company.
- **Partner Sales Representative role.** The Partner Sales Representative role is suitable for users who are members of partner organizations. Users from partner organizations typically have access only to records that relate specifically to their partner organization.
- **Partner Administrator role.** You usually give the Partner Administrator Role to one or more users in a partner organization. These users have the responsibility for creating and editing the partner users of Oracle CRM On Demand. It is recommended that you set up this role in a similar fashion to the Partner Sales Representative role, but with some additional access. Some brand owners will choose not to use this role.

Your company might require roles other than those described in this topic. Before you begin your configuration tasks, do the following:

- Contact Customer Care to have Oracle CRM On Demand for Partner Relationship Management provisioned for your company, as described in [Provisioning Oracle CRM On Demand for Partner Relationship Management](#).
- Determine the fields, page layouts, access profiles, and roles that you must configure to support your company's business needs. Your company requirements might differ from the settings suggested in this chapter.

Migrating Fund Requests from Previous Releases

The Special Pricing Request and MDF Request record types were introduced in Release 18 to replace the Fund Requests record type. If you are currently using fund requests, then you can either continue to use them or you can manually migrate them to the Special Pricing Requests and MDF Requests record types. It is recommended that you do the latter with the current release.

You can migrate fund requests either directly after the upgrade or later, depending on your needs. After the migration, you must not use Fund Requests with Special Pricing Requests and MDF Requests, because this will be problematic. You can access the existing fund request records through the Special Pricing Request and MDF Request record types.

The manual migration to the Special Pricing Request and MDF Request record types involves using the Oracle CRM On Demand for Partner Relationship Management user interface and the batch update capabilities. A script is not provided. Before the migration, all of the fund request records that will be included in this process must have the record type defined as SPA or MDF.

Complete the steps in the following procedure to manually migrate fund requests.


To migrate fund requests

1. Define the principal partner account for each migrated record.


For more information on creating and modifying partner records, see *Oracle CRM On Demand Online Help*.

For example, you can set the principal partner account as the partner organization of the record owner.

2. Migrate the Fund Request Status field values to the Special Pricing and MDF Request Submission Status, Approval Status, and Claim Status field values as shown in the following table:

| Fund Request Field | | Special Pricing or MDF Request Field | |
|---|-------------------|--------------------------------------|-----------------|
| Status | Submission Status | Approval Status | Claim Status |
| In Process | Not Submitted | Blank | Blank |
| Pre-Approval Submitted | Submitted | Pending Approval | Blank |
|  Note: this status is set automatically after updating the Submission Status. | | | |
| Pre-Approval Denied | Submitted | Rejected | Blank |
| Pre-Approved | Submitted | Approved | In Progress |
| Claim Submitted | Submitted | Approved | Claim Submitted |
| Claim Denied | Submitted | Approved | Claim Denied |
| Claim Approved | Submitted | Approved | Claim Approved |

- a. For all fund request submission status fields except In Process, you must set Submission Status to Not Submitted, save the record, and then set it to Submitted.
- b. For all Special Pricing and MDF Request Approval Status fields except In Process and Pre-Approval Submitted, you must set the Submission Status, save the record, and then update the Approval Status.

 **Note:** You must ensure accurate migration of status field values, because these field values determine the logic for other record types that utilize funds.

3. In Oracle CRM On Demand, Remove Fund Requests from User Roles, Access Profiles, Related Item lists, and so on. Replace Fund Requests with the Special Pricing Requests or MDF Requests accordingly.

After the manual migration, the Special Pricing and MDF Request fields must map to the corresponding Fund Request fields (depending on the type of fund request) as shown in the following table:

| Fund Request Field | Special Pricing Request Field | MDF Request Field |
|--------------------|-------------------------------|--------------------|
| Pre-Approval Req. | Total Amount Requested | Amount Requested |
| Granted | Total Amount Authorized | Amount PreApproved |

| Fund Request Field | Special Pricing Request Field | MDF Request Field |
|--------------------|-------------------------------|------------------------------|
| Claim Req. | Total Claim Amount Req. | Total Claim Amount Requested |
| Approved | Total Claim Amount Approved | Total Claim Amount Approved |
| Pre-Approval Date | Not Applicable | Pre-Approval Date |

About the Shared Address Functionality

Starting with Release 20, your company can choose to use the shared address functionality in Oracle CRM On Demand. If your company administrator enables the shared address functionality by selecting the Enable Shared Addresses check box on the company profile, then the addresses that users create in the Address pages can be associated with multiple account, contact, or partner records. Companies that do not have the Enable Shared Addresses check box selected use the unshared address functionality, that is, they do not share address information between any records, and the address information in each record is specific to that record. For more information about the shared address functionality and how to use it, see *Oracle CRM On Demand Online Help*.

Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management

To configure Oracle CRM On Demand for Partner Relationship Management, perform the following processes and tasks:


1. [Setting Up Page Layouts](#)
2. [Setting Up Access Profiles for Partner Roles](#)
3. [Creating Partner Roles](#)
4. [Adding Partner Users](#)
5. [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#)

Setting Up Page Layouts

This task is a step in [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#).

It is recommended that you set up page layouts for each role that you intend to create in Oracle CRM On Demand for Partner Relationship Management.

When setting up a page layout, you can create a new layout, or you can copy or edit an existing layout. You can add fields to the page layout as well as to the sections within the page, and you can also make available the related information in the page layout.

 **Note:** The page layouts described in this guide are the layouts for the Detail and Edit pages where users view and edit existing records of the relevant record types. You can optionally create separate layouts for the pages where users enter information for new records, and then assign those layouts to your user roles. For information about creating layouts for new record pages, see *Oracle CRM On Demand Online Help*.

Record Types for Which PRM Administrators Set Up Page Layouts

PRM administrators typically set up page layouts for both the Channel Manager role and for the Partner Sales Representative role.

Channel Manager Role

For the Channel Manager role, the PRM administrator sets up page layouts for the following record types:


- Accreditation
- Accreditation Request
- Application
- Business Plan
- Certification
- Certification Request
- Course
- Course Enrollment
- Deal Registration
- Exam
- Exam Registration
- Fund
- Fund Request
- Lead
- MDF Request
- Objective
- Opportunity
- Partner
- Price List
- Price List line Item
- Service Request
- Solution
- Special Pricing Product
- Special Pricing Request

Partner Sales Representative Role

For the Partner Sales Representative role, the PRM administrator sets up page layouts for the following record types:

- Accreditation
- Accreditation Request
- Application
- Certification
- Certification Request
- Course
- Course Enrollment
- Deal Registration
- Exam
- Exam Registration
- Fund
- Fund Request
- Lead
- MDF Request
- Objective. Consider your company's business processes and decide whether objective pages should be available to partner sales representatives.
- Opportunity
- Partner. Although it is possible to make the Partner pages available to partner sales representatives, doing so is not recommended.
- Partner Program
- Service Request. It is recommended that service requests are also made available to a separate Partner Service Representative role for partner employees who primarily work on service requests.
- Solution
- Special Pricing Product
- Special Pricing Request

Complete the steps in the following procedure for each page layout that you want to set up.

 **Note:** Some of the suggested page layouts for the Partner Sales Representative role are copies of the page layouts for the Channel Manager role. Complete the setup of the page layouts for the Channel Manager role before you copy them for the Partner Sales Representative role.

To set up a page layout for Oracle CRM On Demand for Partner Relationship Management

1. In Oracle CRM On Demand, click the Admin link, then Application Customization.
2. In the Record Type Setup section, click the link for the required record type.

For example, click the Opportunity record type. For more information, see the following:


- o For information on the typical page layouts for the Channel Manager role, see [Page Layouts for the Channel Manager Role](#).
- o For information on the typical page layouts for the Partner Sales Representative role, see [Page Layouts for the Partner Sales Representative Role](#).

3. In the Page Layout Management section, click the link for the required page layout type.

For example, click the link for the Opportunity Page Layout.

4. Perform the following steps:

- a. On the record type Page Layout page, click Copy (the link next to a layout) to create a new layout that is based on an existing layout, or click New Layout on the title bar to create a new layout.
- b. In Step 1 of the Page Layout Wizard, enter a name for the layout and a description (optional).
- c. Click Finish to save the layout.

 **Note:** You will return later to the Page Layout Wizard to finish setting up the page layout.

5. On the record type Page Layout page, click the Edit Sections link for the layout that you want to configure.

6. In the Section Names Setup page, enter the labels for any new sections that you want to set up on the page layout.

- o For information on the typical page sections for the Channel Manager role, see [Page Sections for the Channel Manager Role Page Layouts](#).
- o For information on the typical page sections for the Partner Sales Representative role, see [Page Sections for the Partner Sales Representative Role Page Layouts](#).

7. Click Save.

8. On the record type Page Layout page, click the Edit link for the layout that you want to configure.

9. In the Page Layout Wizard, go to Step 2 (Field Setup), and specify the field setup for the page layout.

For each available field, select either the Required or the Read-Only check box to support your business processes. For more information, see the following:

- o For more information on typical fields and field layouts (including details of required fields) for the Channel Manager role, see [Page Section Layouts for the Channel Manager Role Page Layouts](#).
- o For more information on typical fields and field layouts (including details of required fields) for the Partner Sales Representative role, see [Page Section Layouts for the Partner Sales Representative Role Page Layouts](#).

10. In the wizard, go to Step 3 (Field Layout), and configure the field layout for the page.

Click the arrows to add fields to the various page sections. Remove any fields that you do not want by moving them from the page sections to the Available Fields list. For more information, see the following:

- o For more information on typical field layouts for the Channel Manager role, see [Page Section Layouts for the Channel Manager Role Page Layouts](#).
- o For more information on typical field layouts for the Partner Sales Representative role, see [Page Section Layouts for the Partner Sales Representative Role Page Layouts](#).

11. In the wizard, go to Step 4 (Related Information), and configure the related information that is available on this page.

Click the arrows to add fields to the appropriate sections. The options are as follows: Additional Information and Displayed Information. For more information, see the following:

- o For more information on typical related information sections for the Channel Manager role, see [Related Information Sections for the Channel Manager Role Page Layouts](#).

- o For more information on typical related information sections for the Partner Sales Representative role, see [Related Information Sections for the Partner Sales Representative Role Page Layouts](#).

12. Click Finish.


Page Layout Configurations for the Channel Manager Role

This topic describes the page layouts that company administrators typically configure for the Channel Manager role. It contains the following information:

- [Page Layouts for the Channel Manager Role](#)
- [Page Sections for the Channel Manager Role Page Layouts](#)
- [Page Section Layouts for the Channel Manager Role Page Layouts](#)
- [Related Information Sections for the Channel Manager Role Page Layouts](#)

Page Layouts for the Channel Manager Role

The following table shows examples of specific layouts that support the Channel Manager role.

 **Note:** The Channel Manager role is created by copying the PRM Administrator role, so the page layouts assigned to the Channel Manager role are initially the same as the page layouts assigned to the PRM Administrator role. However, for certain record types, it is recommended that you configure page layouts that are specific to the Channel Manager role. The layouts that you are recommended to create are listed in the following table. After you create the Channel Manager role later in the configuration process, you assign these page layouts to the role. Do not change the page layouts for the other record types for the Channel Manager role unless your business requires it.

| Record Type | Page Layout to Copy | New Page Layout Name |
|-----------------------|--|---|
| Accreditation | Accreditation Page Standard Layout | Accreditation Page Channel Manager Layout |
| Accreditation Request | Accreditation Request Page Standard Layout | Accreditation Request Page Channel Manager Layout |
| Application | Application Page Standard Layout | Application Page Channel Manager Layout |
| Business Plan | Business Plan Page Standard Layout | Business Plan Page Channel Manager Layout |
| Certification | Certification Page Standard Layout | Certification Page Channel Manager Layout |
| Certification Request | Certification Request Page Standard Layout | Certification Request Page Channel Manager Layout |
| Course | Course Page Standard Layout | Course Page Channel Manager Layout |
| Course Enrollment | Course Enrollment Page Standard Layout | Course Enrollment Page Channel Manager Layout |

| Record Type | Page Layout to Copy | New Page Layout Name |
|-------------------------|--|---|
| Deal Registration | Deal Registration Page Standard Layout | Deal Registration Page Channel Manager Layout |
| Exam | Exam Page Standard Layout | Exam Page Channel Manager Layout |
| Exam Registration | Exam Registration Page Standard Layout | Exam Registration Page Channel Manager Layout |
| Fund | Fund Page Standard Layout | Fund Page Channel Manager Layout |
| Fund Request | Fund Request Page Standard Layout | Fund Request Page Channel Manager Layout |
| Lead | Lead Page Standard Layout | Lead Page Channel Manager Layout |
| MDF Request | MDF Request Page Standard Layout | MDF Request Page Channel Manager Layout |
| Objective | Objective Page Standard Layout | Objective Page Channel Manager Layout |
| Opportunity | Opportunity Page Standard Layout | Opportunity Page Channel Manager Layout |
| Partner | Partner Page Standard Layout | Partner Page Channel Manager Layout |
| Price List | Price List Page Standard Layout | Price List Page Channel Manager Layout |
| Price List Line Item | Price List Line Item Page Standard Layout | Price List Line Item Page Channel Manager Layout |
| Service Request | Service Request Page Standard Layout | Service Request Page Channel Manager Layout |
| Solution | Solution Page Standard Layout | Solution Page Channel Manager Layout |
| Special Pricing Product | Special Pricing Product Page Standard Layout | Special Pricing Product Page Channel Manager Layout |
| Special Pricing Request | Special Pricing Request Page Standard Layout | Special Pricing Request Page Channel Manager Layout |

Page Sections for the Channel Manager Role Page Layouts

The following table describes the sections that company administrators typically set up for page layouts for the Channel Manager role.

| Page Layout | Existing Section Name | New Section Name |
|---|--------------------------|------------------|
| Accreditation Page Channel Manager Layout | Key Information | Do not rename. |
| | Accreditation Details | Do not rename. |
| | Contact Information | Do not rename. |
| | Additional Information | Do not rename. |
| Accreditation Request Page Channel Manager Layout | Key Request Information | Do not rename. |
| | Additional Information | Do not rename. |
| Application Page Channel Manager Layout | Company Profile | Do not rename. |
| | Application Submitted By | Do not rename. |
| | Partnership Information | Do not rename. |
| | Additional Information | Do not rename. |
| Business Plan Page Channel Manager Layout | Key Plan Information | Do not rename. |
| | SWOT Analysis | Do not rename. |
| Certification Page Channel Manager Layout | Key Information | Do not rename. |
| | Certification Details | Do not rename. |
| | Contact Information | Do not rename. |
| | Additional Information | Do not rename. |
| Certification Request Page Channel Manager Layout | Key Request Information | Do not rename. |
| | Additional Information | Do not rename. |
| Course Page Channel Manager Layout | Key Information | Do not rename. |
| | Course Details | Do not rename. |
| | Contact Information | Do not rename. |
| | Additional Information | Do not rename. |

| Page Layout | Existing Section Name | New Section Name |
|---|-----------------------------------|-------------------------|
| Course Enrollment Page Channel Manager Layout | Key Enrollment Information | Do not rename. |
| | Additional Information | Do not rename. |
| Deal Registration Page Channel Manager Layout | Deal Registration Key Information | Do not rename. |
| | Opportunity Information | Do not rename. |
| | Customer Information | Do not rename. |
| | Approval Information | Do not rename. |
| | Additional Information | Do not rename. |
| Exam Page Channel Manager Layout | Key Information | Do not rename. |
| | Exam Details | Do not rename. |
| | Contact Information | Do not rename. |
| | Additional Information | Do not rename. |
| Exam Registration Page Channel Manager Layout | Key Registration Information | Do not rename. |
| | Additional Information | Do not rename. |
| Fund Page Channel Manager Layout | Key Fund Information | Do not rename. |
| Fund Request Page Channel Manager Layout | Key Fund Request Information | Do not rename. |
| | Fund Request Detail Information | Preapproval Information |
| | Additional Information | Claim Information |
| | Available Section | Additional Information |
| Lead Page Channel Manager Layout | Key Lead Information | Do not rename. |
| | Opportunity Related Information | Do not rename. |
| | Additional Information | Owner Information |
| | Available Section | Additional Information |

| Page Layout | Existing Section Name | New Section Name |
|--|-----------------------------------|--------------------------|
| MDF Request Page Channel Manager Layout | Key MDF Request Information | Do not rename. |
| | MDF Request Detail Information | Do not rename. |
| | Claim Information | Do not rename. |
| | Additional Information | Do not rename. |
| Objective Plan Page Channel Manager Layout | Key Objective Information | Do not rename. |
| | Target Information | Do not rename. |
| | Additional Information | Do not rename. |
| Opportunity Page Channel Manager Layout | Key Opportunity Information | Do not rename. |
| | Sales Detail Information | Do not rename. |
| | Available Section | Registration Information |
| | Additional Information | Owner Information |
| | Available Section | Additional Information |
| Partner Page Channel Manager Layout | Key Partner Information | Do not rename. |
| | Profile Information | Do not rename. |
| | Additional Company Profile | Do not rename. |
| | Additional Information | Do not rename. |
| Price List Page Channel Manager Layout | Key Price List Information | Do not rename. |
| | Additional Information | Do not rename. |
| Price List Line Item Page Channel Manager Layout | Key Product Information | Do not rename. |
| | Key Product Line Item Information | Do not rename. |
| | Additional Information | Additional Information |
| Service Request Page Channel Manager Layout | Contact Information | Do not rename. |

| Page Layout | Existing Section Name | New Section Name |
|---|--|-----------------------|
| | Service Detail Information | Do not rename. |
| | Available Section | Customer Satisfaction |
| Solution Page Channel Manager Layout | Solution Detail Information | Do not rename. |
| Special Pricing Product Page Channel Manager Layout | Key Product Information | Do not rename. |
| | Special Pricing Request Detail Information | Do not rename. |
| | Special Pricing Request Justification | Do not rename. |
| | Additional Information | Do not rename. |
| Special Pricing Request Page Channel Manager Layout | Key Special Pricing Request Information | Do not rename. |
| | Special Pricing Request Detail Information | Do not rename. |
| | Claim Information | Do not rename. |
| | Additional Information | Do not rename. |

Page Section Layouts for the Channel Manager Role Page Layouts

The following table shows the page section layouts that company administrators typically set up in the page layouts for the Channel Manager role.

| Page Layout | Page Section Layout |
|--|------------------------|
| Accreditation Page Channel Manager Layout | Key Information |
| | Name |
| | Type |
| | Status |
| | Available From |

Page Layout

Page Section Layout

Accreditation ID

Primary Product Category

Primary Product

Available Till

Accreditation Details

Validity (Months)

Renewable

Website

Currency

Accreditation Fee

Payment Options

Contact Information

Contact

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name

Last Name

Account

E-mail

Phone

Page Layout

Page Section Layout

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

**Accreditation Request Page
Channel Manager Layout**

Key Request Information

Accreditation

Objective

Request Date

Accreditation Number

Renewable

Partner

Accreditation Date

Accreditation Status

Expiration Date

Additional Information

Created By

Created: Date

Owner

Modified By

Page Layout

Page Section Layout

Modified: Date

Description

**Application Page Channel Manager
Layout**

Company Profile

Name

Location

Main Phone #

Main Fax #

Web Site

Number of Employees

Annual Revenue

Industry

Owner

Address

Application Submitted By

First Name

Last Name

Work Phone #

Cellular Phone #

Work Fax #

Email Address

Job Title

Submission Status

Page Layout

Page Section Layout

Current Approver

Partnership Information

Approval Status

Submitted Date

Approved Date

Processed By: Name

Reject Reason

Created

Partner Program

Program Level

Partner Type

Expected Partnership Benefits

Existing Partnerships

Modified

Additional Information

Source

Campaign

Application ID

Partner

**Business Plan Page Channel
Manager Layout**

Key Plan Information

Plan Name

Period

Page Layout

Page Section Layout

Period: Start Date

Period: End Date

Type

Status

Principal Partner Account

Product Name

Plan Revenue

Currency

Owner

Description

SWOT Analysis

Strengths

Weaknesses

Opportunities

Threats

**Certification Page Channel Manager
Layout**

Key Information

Name

Type

Status

Available From

Certification ID

Primary Product Category

Page Layout

Page Section Layout

Primary Product

Available Till

Certification Details

Validity (Months)

Renewable

Website

Currency

Certification Fee

Payment Options

Contact Information

Contact

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name

Last Name

Account

E-mail

Phone

Additional Information

Created By

Page Layout

Page Section Layout

Created: Date

Owner

Modified By

Modified: Date

Description

**Certification Request Page Channel
Manager Layout**

Key Request Information

Certification

Objective

Request Date

Certification Number

Renewable

Candidate

Certification Date

Certification Status

Expiration Date

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

Page Layout

Page Section Layout

**Course Page Channel Manager
Layout**

Key Information

Name

Type

Status

Available From

Course ID

Primary Product Category

Primary Product

Available Till

Course Details

Duration (Hours)

Course Length (Days)

Format

Medium

External Unique ID

Website

Hands-On Lab

Exam

Currency

Course Fee

Payment Options

Objective

Page Layout

Page Section Layout

Contact Information

Contact

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name

Last Name

Account

E-mail

Phone

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

**Course Enrollment Page Channel
Manager Layout**

Key Enrollment Information

Course

Objective

Enrollment Date

Page Layout

Page Section Layout

Enrollment Status

Candidate

Enrollment Number

Completion Date

Course Partner

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

**Deal Registration Page Channel
Manager Layout**

Deal Registration Key Information

Name

Type

Submission Status

Expiration Date

Special Price Reqd

ID

Principal Partner

Principal Partner Location

Partner Program

Support Reqd

Page Layout

Page Section Layout

Opportunity Information

Associated Opportunity

New Opportunity

Currency

Deal Size

Close Date

Product Interest

Next Step

Customer Information

Associated Customer

New Customer

Company Name

Country

Address 1

Address 2

City

Province

Post Code

Fax

Associated Contact

New Contact

Mr./Ms.

Page Layout

Page Section Layout

First Name

Middle Name

Last Name

Job Title

Email

Telephone #

Cell Phone

Approval Information

Approval Status

Current Approver

Final Approver

Submitted Date

Approved Date

Reject Reason

Additional Information

Owner

Owner Partner Account

Originating Partner Account

Created

Modified

Description

**Exam Page Channel Manager
Layout**

Key Information

Page Layout

Page Section Layout

Name

Type

Status

Available From

Exam ID

Primary Product Category

Primary Product

Available Till

Exam Details

Number of Questions

Time Allowed (Minutes)

Maximum Score

Passing Score

Validity (Months)

Website

Format

Medium

Grading Method

Currency

Exam Fee

Payment Options

Contact Information

Page Layout

Page Section Layout

Contact

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name

Last Name

Account

E-mail

Phone

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

**Exam Registration Page Channel
Manager Layout**

Key Information

Exam

Objective

Registration Date

Registration Status

Page Layout

Page Section Layout

Exam Partner

Score Expires On

Candidate

Registration Number

Completion Date

Score Achieved

Grade Achieved

Exam Date

Additional Information

Owner

Description

Fund Page Channel Manager Layout

Key Fund Information

Fund ID

Fund Name

Start Date

End Date

Status

Type

Partner

Target Amount

Total Credits

Total Debits

Page Layout

Page Section Layout

Balance

Total Pre-Approved

Balance After Pre-Approvals

Allow Negative Balance

Fund Currency

Owner

**Fund Request Page Channel
Manager Layout**

Key Fund Request Information

Request Id

Fund Request Name

Fund

Type

Status

Opportunity

Opportunity Account

Due Date

Fund Request Currency

Preapproval Information

Pre-Approval Req

Granted

Pre-Approval Date

Begin Date

End Date

Page Layout

Page Section Layout

Claim Information

Claim Req.

Approved

Request Date

Claim Decision Date

Additional Information

Owner

Owner Account

Channel Manager

Approver

Lead Page Channel Manager Layout

Key Lead Information

Mr. Ms

First Name

Last Name

Company

Job Title

Created External

Primary Phone #

Cellular Phone

Work Fax #

Email

Never Email

Page Layout

Page Section Layout

Modified External

Opportunity Related Information

Status

Rating

Product Interest

Potential Revenue

Estimated Close Date

Next Step

Lead Currency

Source

Campaign

Industry

Annual Revenues

Number of Employees

Owner Information

Owner Full Name

Ownership Status

Reassign Owner

Owner Account

Channel Manager

Sales Person

Additional Information

Page Layout

Page Section Layout

Associated Account

Associated Contact

Associated Opportunity

Billing

Website

**MDF Request Page Channel
Manager Layout**

Key MDF Request Information

Request ID

Request Name

Principal Partner Account

Fund

Submission Status

Due Date

Expiration Date

Campaign

Marketing Purpose

Region

Category

Partner Program

MDF Request Currency

MDF Request Detail Information

Start Date

End Date

Page Layout

Page Section Layout

Amount Requested

Amount PreApproved

Approval Status

Request Date

Submitted Date

Pre-Approval Date

Approver

Last Approved By

Reason Code

Claim Information

Total Claim Amount Requested

Total Claim Amount Approved

Claim Status

Claim Decision Date

Additional Information

Owner

Modified

Owner Partner Account

Description

**Objective Page Channel Manager
Layout**

Key Objective Information

Objective Name

Plan Name

Page Layout

Page Section Layout

Type

Status

Account Name

Contact Name

Product Name

Period

Period: Start Date

Period: End Date

Target Information

Objective Revenue

Currency

Exchange Date

Target Audience

Objective Target

Objective Units

Additional Information

Created

Description

Owner

Modified

**Opportunity Page Channel Manager
Layout**

Key Opportunity Information

Opportunity Name

Page Layout

Page Section Layout

Account

Sales Stage

Next Step

Registration Status

Approval Status

Revenue

Partner Program

Close Date

Forecast

Opportunity Currency

Territory

Sales Detail Information

Status

Priority

Lead Source

Opportunity Type

Product Interest

Probability%

Expected Revenue

Source Campaign

Reason Won/Lost

Registration Information

Page Layout

Page Section Layout

Registration Status*

Registered Partner*

Registration Expires*

Registered Partner Location*

Owner Information

Owner

Ownership Status

Approver

Owner Account

Reassign Opportunity

Channel Account Manager

Additional Information

Modified By:

Created By:

Modified: Date External

Created:

**Partner Page Channel Manager
Layout**

Key Partner Information

Partner Name

Primary Partner Type

Location

Partner Organization Status

Maximum Number of Users

Page Layout

Page Section Layout

Main Phone #

Main Fax #

Web Site

Price List

Number of Active Users

Profile Information

Description

Additional Company Profile

Billing

Company Identifier

Annual Revenues

Number of Employees

Industry

Shipping

Expertise

Region

Partner Currency

Additional Information

Created

Owner

Owner Partner Account

Originating Partner Account

Page Layout

Page Section Layout

Modified External

Channel Account Manager

Principal Partner Account

**Price List Page Channel Manager
Layout**

Key Price List Information

Price List Name

Effective From

Effective To

Type

Status

Currency

Additional Information

Created

Description

Modified

**Price List Line Item Page Channel
Manager Layout**

Key Product Information

Price List

Product

Effective From*

Effective To

Product: Part #

Price Type

List Price

Page Layout

Page Section Layout

Key Product Line Item Information

Created

Description

Modified

**Service Request Page Channel
Manager Layout**

Contact Information

Service Number

Account

Principal Partner Account

Principal Partner Account: Channel Account Manager Alias

Contact

Work Phone #

Email

Service Detail Information

Area

Cause

Type

Source

Product

Error Message

Next Step

Priority

Status

Page Layout

Page Section Layout

Opened Time

Closed Time

Owner

Reassign Owner

Owner Partner Account

Customer Satisfaction

Last Survey Outcome

Overall Service Experience

**Solution Page Channel Manager
Layout**

Solution Detail Information

Solution ID

Title

Product

Product Category

Solution Rating

Number of Ratings

Status

Published

Publish to PRM

Externally Published

Service Request Count

Created External

Modified External

Page Layout

Page Section Layout

**Special Pricing Product Page
Channel Manager Layout**

Key Product Information

Product

Product: Product Category

Quantity

Currency

Product: Part #

Product: Type

Product: Status

MSRP

Special Pricing Request Detail Information

Purchase Cost

Requested Cost

Requested Resale Price

Authorized Cost

Suggested Resale Price

Requested Amount

Requested Discount Percent

Authorized Amount

Authorized Discount Percent

Special Pricing Request Justification

Competitor Name

Competitor Product

Page Layout

Page Section Layout

Competitor Product Price

Competitive Partner

Other Competitive Information

Additional Information

Created

Description

Modified

**Special Pricing Request Page
Channel Manager Layout**

Key Special Pricing Request Information

ID

Request Name

Principal Partner Account

Submission Status

Due Date

Fund

Opportunity

End Customer

Originating Partner Account

Deal Registration

Partner Program

Currency

Special Pricing Request Detail Information

Start Date

Page Layout

Page Section Layout

End Date

Total Amount Requested

Total Amount Authorized

Approval Status

Request Date

Submitted Date

Authorized Date

Approver

Last Approved By

Reason Code

Claim Information

Total Claim Amount Requested

Total Claim Amount Approved

Claim Status

Claim Decision Date


Additional Information

Owner

Modified

Owner Partner Account

Description

 **Note:** The Effective From date on the Price List Line Item page layout does not display the Effective From date of the associated price list by default.

The fields marked with an asterisk (*) in the Registration Information section (under the Opportunity Page Channel Manager Layout) of the preceding table will be populated only if you use the Deal Registration record type to manage your deal registrations. These fields will not be populated if you continue to use Opportunity record type to track and manage your deal registrations. In such cases, you can remove the Registration Information section from the layout.

Related Information Sections for the Channel Manager Role Page Layouts

The following table shows the related information sections that company administrators typically make available (that is, move to the Displayed Information section) in the page layouts for the Channel Manager role.

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|---|
| Accreditation Page Channel Manager Layout | Accreditation Attachments |
| | Books |
| | Accreditation Product Categories |
| | Accreditation Products |
| | Accreditation Solutions |
| | Related Accreditations |
| | Accreditation Certifications |
| | Accreditation Requests |
| | Accreditation Team |
| Application Page Channel Manager Layout | Activities |
| | Application Team |
| | Books |
| | Application Attachments |
| | Audit Trail |
| Business Plan Page Channel Manager Layout | Objectives |
| | Activities |

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|---|
| | Business Plans |
| | Business Plan Team |
| | Accreditation Requests |
| Certification Page Channel Manager Layout | Certification Attachments |
| | Books |
| | Certification Product Categories |
| | Certification Products |
| | Certification Solutions |
| | Related Certifications |
| | Certification Courses |
| | Certification Exams |
| | Accreditation Certifications |
| | Certification Requests |
| | Certification Team |
| Course Page Channel Manager Layout | Course Attachments |
| | Books |
| | Course Product Categories |
| | Course Products |
| | Course Solutions |
| | Course Partners |
| | Related Courses |
| | Course Exams |

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|--|
| | Certification Courses <hr/> Course Enrollments <hr/> Course Team |
| Deal Registration Page Channel Manager Layout | Deal Registration Team <hr/> Special Pricing Requests <hr/> Activities <hr/> Deal Registration Product Revenues <hr/> Audit Trail |
| Exam Page Channel Manager Layout | Exam Attachments <hr/> Books <hr/> Exam Product Categories <hr/> Exam Products <hr/> Exam Solutions <hr/> Exam Partners <hr/> Related Exams <hr/> Course Exams <hr/> Certification Exams <hr/> Exam Registrations <hr/> Courses <hr/> Exam Team |
| Fund Page Channel Manager Layout | Fund Membership <hr/> Fund Participants List |

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|--|
| | Fund Request List <hr/> Fund Debits List <hr/> Fund Credits List <hr/> MDF Requests <hr/> Attachments <hr/> Notes <hr/> Audit Trail <hr/> Books |
| Fund Request Page Channel Manager Layout | Attachments <hr/> Notes <hr/> Open Activities <hr/> Completed Activities |
| Lead Page Channel Manager Layout | Lead Partners <hr/> Open Activities <hr/> Completed Activities <hr/> Attachments <hr/> Lead Qualification Scripts |
| MDF Request Page Channel Manager Layout | Activities <hr/> Books <hr/> MDF Request Team <hr/> MDF Request Attachments <hr/> Audit Trail |

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|---|
| Objective Page Channel Manager Layout | Activities <hr/> Objective Team <hr/> Leads <hr/> Deal Registrations <hr/> Opportunities <hr/> Special Pricing Requests <hr/> MDF Requests <hr/> Service Requests |
| Opportunity Page Channel Manager Layout | Opportunity Partners <hr/> Leads <hr/> Opportunity Team <hr/> Contacts <hr/> Product Revenues <hr/> Notes <hr/> Open Activities <hr/> Completed Activities <hr/> Opportunity Competitors <hr/> Attachments <hr/> Books <hr/> Deal Registrations (if needed) <hr/> Special Pricing Requests (if needed) <hr/> Audit Trail |

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|---|
| Partner Page Channel Manager Layout | Partner Type <hr/> Partner Relationships <hr/> Partner User Roles <hr/> Addresses <hr/> Applications <hr/> Deal Registrations (if needed) <hr/> Lead (if needed) <hr/> MDF Requests (if needed) <hr/> Special Pricing Requests (if needed) <hr/> Notes <hr/> Books <hr/> Partner Organization Books <hr/> Partner Campaigns <hr/> Partner Plans <hr/> Audit Trail |
| Price List Page Channel Manager Layout | Price List Line Items |
| Price List Line Item Page Channel Manager Layout | None |
| Service Request Page Channel Manager Layout | Solutions <hr/> Open Activities <hr/> Completed Activities <hr/> Notes <hr/> Audit Trail |

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|--|
| | <hr/> Attachments <hr/> Service Request Team <hr/> Books |
| Solution Page Channel Manager Layout | Related Solutions <hr/> Service Requests <hr/> Attachments |
| Special Pricing Product Page Channel Manager Layout | None |
| Special Pricing Request Page Channel Manager Layout | Special Pricing Products <hr/> Activities <hr/> Books <hr/> Special Pricing Request Team <hr/> Special Pricing Request Attachments <hr/> Audit Trail |

Page Layout Modifications for the Partner Sales Representative Role

This topic describes the page layouts that are suggested for the Partner Sales Representative role. It contains the following information:

- [Page Layouts for the Partner Sales Representative Role](#)
- [Page Sections for the Partner Sales Representative Role Page Layouts](#)
- [Page Section Layouts for the Partner Sales Representative Role Page Layouts](#)
- [Related Information Sections for the Partner Sales Representative Role Page Layouts](#)

Page Layouts for the Partner Sales Representative Role

Some of the suggested page layouts for the Partner Sales Representative role are copies of the page layouts for the Channel Manager role. You must modify the page layouts for the Channel Manager role before you copy them for the Partner Sales Representative role.

The following table shows the page layouts that company administrators typically configure for the Partner Sales Representative role.

| Record Type | Page Layout to Copy | New Page Layout Name |
|-----------------------|---|--|
| Accreditation | Accreditation Page Channel Manager Layout | Accreditation Page Partner Sales Representative Layout |
| Accreditation Request | Accreditation Request Page Channel Manager Layout | Accreditation Request Page Partner Sales Representative Layout |
| Application | Application Page Standard Layout | Application Page Partner Sales Representative Layout |
| Certification | Certification Page Channel Manager Layout | Certification Page Partner Sales Representative Layout |
| Certification Request | Certification Request Page Channel Manager Layout | Certification Request Page Partner Sales Representative Layout |
| Course | Course Page Channel Manager Layout | Course Page Partner Sales Representative Layout |
| Course Enrollment | Course Enrollment Page Channel Manager Layout | Course Enrollment Page Partner Sales Representative Layout |
| Deal Registration | Deal Registration Page Standard Layout | Deal Registration Page Partner Sales Representative Layout |
| Exam | Exam Page Channel Manager Layout | Exam Page Partner Sales Representative Layout |
| Exam Registration | Exam Registration Page Channel Manager Layout | Exam Registration Page Partner Sales Representative Layout |
| Fund | Fund Page Standard Layout | Fund Page Partner Sales Representative Layout |
| Fund Request | Fund Request Page Standard Layout | Fund Request Page Partner Sales Representative Layout |
| Leads | Lead Page Channel Manager Layout | Lead Page Partner Sales Representative Layout |
| MDF Request | MDF Request Page Standard Layout | MDF Request Page Partner Sales Representative Layout |

| Record Type | Page Layout to Copy | New Page Layout Name |
|-------------------------|--|--|
| Objective | Objective Page Standard Layout | Objective Page Partner Sales Representative Layout |
| Opportunity | Opportunity Page Channel Manager Layout | Opportunity Page Partner Sales Representative Layout |
| Partner Program | Partner Program Page Standard Layout | Partner Program Page Partner Sales Representative Layout |
| Service Request | Service Request Page Standard Layout | Service Request Page Partner Representative Layout |
| Solution | Solution Page Channel Manager Layout | Solution Page Partner Sales Representative Layout |
| Special Pricing Product | Special Pricing Product Page Standard Layout | Special Pricing Product Page Partner Sales Representative Layout |
| Special Pricing Request | Special Pricing Request Page Standard Layout | Special Pricing Request Page Partner Sales Representative Layout |

Page Sections for the Partner Sales Representative Role Page Layouts

The suggested page sections for the Partner Sales Representative role are the same as the page sections for the Channel Manager role as shown in [Page Sections for the Channel Manager Role Page Layouts](#). When you create the page layouts for the Partner Sales Representative role by copying the page layouts for the Channel Manager role, do not configure any additional sections for the page layouts for the Partner Sales Representative role.

Page Section Layouts for the Partner Sales Representative Role Page Layouts

The following table shows the page section layouts that company administrators typically set up in the page layouts for the Partner Sales Representative role. It is recommended that you change the fields that are followed by an asterisk (*) to be read-only fields. You make this change in the field setup section of the page layout wizard. It is recommended that all other fields that are read-only by default remain as read-only fields.

| Page Layout | Page Section Layout |
|---|------------------------|
| Accreditation Page Partner Sales Representative Layout | Key Information |
| | Name |
| | Type* |

Page Layout

Page Section Layout

Status

Available From*

Accreditation ID*

Primary Product Category*

Primary Product*

Available Till*

Accreditation Details

Validity (Months)*

Renewable*

Website*

Currency*

Accreditation Fee*

Payment Options*

Contact Information

Contact*

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name*

Last Name*

Account*

Page Layout

Page Section Layout

E-mail*

Phone*

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description*

**Accreditation Request Page Partner
Sales Representative Layout**

Key Request Information

Accreditation

Objective

Request Date

Accreditation Number*

Renewable*

Partner

Accreditation Date*

Accreditation Status*

Expiration Date*

Additional Information

Created By

Created: Date

Page Layout

Page Section Layout

Owner

Modified By

Modified: Date

Description

**Application Page Partner Sales
Representative Layout**

Company Profile

Name

Location

Main Phone #

Main Fax #

Web Site

Number of Employees

Annual Revenue

Industry

Owner

Address

Application Submitted By

First Name

Last Name

Work Phone #

Cellular Phone #

Work Fax #

Email Address

Page Layout

Page Section Layout

Job Title

Submission Status

Current Approver

Partnership Information

Approval Status

Submitted Date

Approved Date

Processed By: Name

Reject Reason

Created

Partner Program

Program Level

Partner Type

Expected Partnership Benefits

Existing Partnerships

Modified

Additional Information

Source

Campaign

Application ID

Partner

Page Layout

Page Section Layout

**Certification Page Partner Sales
Representative Layout**

Key Information

Name

Type*

Status

Available From*

Certification ID*

Primary Product Category*

Primary Product*

Available Till*

Certification Details

Validity (Months)*

Renewable*

Website*

Currency*

Certification Fee*

Payment Options*

Contact Information

Contact*

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

Page Layout

Page Section Layout

First Name*

Last Name*

Account*

E-mail*

Phone*

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description*

**Certification Request Page Partner
Sales Representative Layout**

Key Request Information

Certification

Objective

Request Date

Certification Number*

Renewable*

Candidate

Certification Date*

Certification Status*

Expiration Date*

Page Layout

Page Section Layout

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

**Course Page Partner Sales
Representative Layout**

Key Information

Name

Type*

Status

Available From*

Course ID*

Primary Product Category*

Primary Product*

Available Till*

Course Details

Duration (Hours)*

Course Length (Days)*

Format*

Medium*

External Unique ID*

Page Layout

Page Section Layout

Website*

Hands-on Lab*

Exam*

Currency*

Course Fee*

Payment Options*

Objective*

Contact Information

Contact*

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name*

Last Name*

Account*

E-mail*

Phone*

Additional Information

Created By

Created: Date

Owner

Page Layout

Page Section Layout

Modified By

Modified: Date

Description*

**Course Enrollment Page Partner
Sales Representative Layout**

Key Enrollment Information

Course

Objective

Enrollment Date

Enrollment Status*

Candidate

Enrollment Number

Completion Date

Course Partner

Additional Information

Created By

Created: Date

Owner

Modified By

Modified: Date

Description

**Deal Registration Page Partner
Sales Representative Layout**

Deal Registration Key Information

Name

Type

Page Layout

Page Section Layout

Submission Status

Expiration Date

Special Price Reqd

ID

Principal Partner

Principal Partner Location

Partner Program

Support Reqd

Opportunity Information

Associated Opportunity

New Opportunity

Currency

Deal Size

Close Date

Product Interest

Next Step

Customer Information

Associated Customer

New Customer

Company Name

Country

Address 1

Page Layout

Page Section Layout

Address 2

City

Province

Post Code

Associated Contact

New Contact

Mr./Ms.

First Name

Middle Name

Last Name

Job Title

Email

Telephone #

Cell Phone

Fax

Approval Information

Approval Status*

Current Approver*

Final Approver

Submitted Date

Approved Date

Reject Reason*

Page Layout

Page Section Layout

Additional Information

Owner

Owner Partner Account

Originating Partner Account

Description

Created

Modified

**Exam Page Partner Sales
Representative Layout**

Key Information

Name

Type*

Status

Available From*

Exam ID*

Primary Product Category*

Primary Product*

Available Till*

Exam Details

Number of Questions*

Time Allowed (Minutes)*

Maximum Score*

Passing Score*

Validity (Months)*

Page Layout

Page Section Layout

Website*

Format*

Medium*

Grading Method*

Currency*

Exam Fee*

Payment Options*

Contact Information

Contact*

Contact: First Name

Contact: Last Name

Contact: Account

Contact: Email

First Name*

Last Name*

Account*

E-mail*

Phone*

Additional Information

Created By

Created: Date

Owner

Page Layout

Page Section Layout

Modified By

Modified: Date

Description*

**Exam Registration Page Partner
Sales Representative Layout**

Key Information

Exam

Objective

Registration Date

Registration Status*

Exam Partner

Score Expires On*

Candidate

Registration Number

Completion Date

Score Achieved

Grade Achieved

Exam Date

**Fund Page Partner Sales
Representative Layout**

Key Fund Information

Fund ID

Fund Name*

Status*

Allow Negative Balance*

Type*

Page Layout

Page Section Layout

Fund Currency*

Start Date*

End Date*

Additional Information

Owner

Modified

**Fund Request Page Partner Sales
Representative Layout**

Key Fund Request Information

Request ID

Fund Request Name

Fund

Type

Status

Opportunity

Opportunity Account

Due Date

Fund Request Currency

Preapproval Information

Pre-Approval Req

Granted*

Pre-Approval Date*

Begin Date*

End Date*

Page Layout

Page Section Layout

Claim Information

Claim Req.

Approved*

Request Date

Claim Decision Date*

Additional Information

Owner

Owner Account

Channel Manager

Approver*

**Lead Page Partner Sales
Representative Layout**

Key Lead Information

Mr. Ms.

First Name

Last Name

Company

Job Title

Created External

Lead Convert

Primary Phone #

Cellular Phone

Work Fax #

Email

Page Layout

Page Section Layout

Never Email

Modified External

Opportunity Related Information

Status

Rating

Product Interest

Potential Revenue

Estimated Close Date

Next Step

Lead Currency

Source

Campaign

Industry

Annual Revenues

Number of Employees

Owner Information

Owner Full Name

Ownership Status

Reassign Owner

Owner Account

Channel Manager

Sales Person

Page Layout

Page Section Layout

Additional Information

Associated Account

Associated Contact

Associated Opportunity

Billing

Web Site

**MDF Request Page Partner Sales
Representative Layout**

Key MDF Request Information

Request ID

Request Name

Principal Partner Account

Fund

Submission Status

Due Date

Expiration Date*

Campaign

Marketing Purpose

Region

Category

Partner Program

MDF Request Currency

MDF Request Detail Information

Start Date

Page Layout

Page Section Layout

End Date

Amount Requested

Amount PreApproved*

Approval Status*

Request Date*

Submitted Date*

Pre-Approval Date*

Approver*

Last Approved By*

Reason Code*

Claim Information

Total Claim Amount Requested

Total Claim Amount Approved*

Claim Status

Claim Decision Date*

Additional Information

Owner

Modified

Owner Partner Account

Description

**Objective Page Partner Sales
Representative Layout**

Key Objective Information

Objective Name

Page Layout

Page Section Layout

Plan Name

Type

Status

Account Name

Contact Name

Product Name

Period

Period: Start Date

Period: End Date

Target Information

Objective Revenue

Currency

Exchange Date

Target Audience

Objective Target

Objective Units

Additional Information

Created

Description

Owner

Modified

**Opportunity Page Partner Sales
Representative Layout**

Key Opportunity Information

Page Layout

Page Section Layout

Opportunity Name

Account

Sales Stage

Next Step

Registration Status

Approval Status*

Revenue

Partner Program

Close Date

Forecast

Opportunity Currency

Territory

Sales Detail Information

Status

Priority

Lead Source

Opportunity Type

Product Interest

Probability%

Expected Revenue

Source Campaign

Reason Won/Lost

Page Layout

Page Section Layout

Owner Information

Owner

Ownership Status*

Approver*

Owner Account

Reassign Opportunity

Channel Account Manager

Additional Information

Modified By

Created By:

Modified: Date External

Created:

**Partner Program Page Partner Sales
Representative Layout**

Key Partner Program Information

Partner Program Name*

Status*

Begin Date*

End Date*

MDF Allowed*

Special Pricing Allowed*

Deal Registration Allowed*

Program Details

Description*

Page Layout

Page Section Layout

Additional Information

Created

Owner Full Name

Modified

**Service Request Page Partner Sales
Representative Layout**

Contact Information

Service Number

Account

Principal Partner Account

Contact

Work Phone #

Email

Service Detail Information

Area

Cause

Type

Source

Modified External

Created External

SR Currency

Priority

Status

Opened Time

Page Layout

Page Section Layout

Closed Time

Owner

Owner Partner Account

Reassign Owner

**Solution Page Partner Sales
Representative Layout**

Solution Detail Information

Solution ID

Title

Product

Status

Published

Solution Rating

Created External

Modified External

**Special Pricing Product Page
Partner Sales Representative Layout**

Key Product Information

Product

Product: Product Category

Quantity

Currency

Product: Part #

Product: Type

Product: Status

MSRP*

Page Layout

Page Section Layout

Special Pricing Request Detail Information

Purchase Cost

Requested Cost

Requested Resale Price

Authorized Cost*

Suggested Resale Price*

Requested Amount

Requested Discount Percent

Authorized Amount

Authorized Discount Percent

Special Pricing Request Justification

Competitor Name

Competitor Product

Competitor Product Price

Competitive Partner

Other Competitive Information

Additional Information

Created

Description

Modified

**Special Pricing Request Page
Partner Sales Representative Layout**

Key Special Pricing Request Information

Request ID

Page Layout

Page Section Layout

Request Name

Principal Partner Account

Submission Status

Due Date

Opportunity

End Customer

Originating Partner Account

Deal Registration

Partner Program

Currency

Special Pricing Request Detail Information

Start Date

End Date

Total Amount Requested

Total Amount Authorized*

Approval Status*

Request Date*

Submitted Date*

Authorized Date*

Approver*

Last Approved By*

Reason Code*

Page Layout

Page Section Layout

Claim Information

Total Claim Amount Requested

Total Claim Amount Approved*

Claim Status

Claim Decision Date*

Additional Information

Owner

Modified

Owner Partner Account

Description

Access for the Partner Sales Representative Role

Typically, the Partner Sales Representative role cannot update any information on the Accreditation, Certification, Course and Exam record types. Accreditations, certifications, courses, and exams are read-only for the Partner Sales Representative role.

You can implement one of the following:

- Grant the Partner Sales Representative role read-only access to the four record types.

It is recommended that you use this approach because it is easier to enforce, especially if you will be adding more fields to the page layouts frequently.

- Make the fields read-only on the appropriate page layouts for the four record types.

This approach is useful only if you want the Partner Sales Representative role to be able to update some fields on some of the four record types.

Related Information Sections for the Partner Sales Representative Role Page Layouts

The following table shows the related information sections that company administrators typically make available (that is, move to the Displayed Information section) in the page layouts for the Partner Sales Representative role.

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|--|
| Accreditation Page Partner Sales Representative Layout | Accreditation Attachments <hr/> Accreditation Product Categories <hr/> Accreditation Products <hr/> Accreditation Solutions <hr/> Related Accreditations <hr/> Accreditation Certifications <hr/> Accreditation Requests |
| Application Page Partner Sales Representative Layout | Application Attachments |
| Certification Page Partner Sales Representative Layout | Certification Attachments <hr/> Certification Product Categories <hr/> Certification Products <hr/> Certification Solutions <hr/> Related Certifications <hr/> Certification Courses <hr/> Certification Exams <hr/> Accreditation Certifications <hr/> Certification Requests |
| Course Page Partner Sales Representative Layout | Course Attachments <hr/> Course Product Categories <hr/> Course Products <hr/> Course Solutions <hr/> Course Partners |

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|--|
| | Related Courses <hr/> Course Exams <hr/> Certification Courses <hr/> Course Enrollments |
| Deal Registration Page Partner Sales Representative Layout | Deal Registration Product Revenues <hr/> Special Pricing Requests <hr/> Deal Registration Team <hr/> Activities |
| Exam Page Partner Sales Representative Layout | Exam Attachments <hr/> Exam Product Categories <hr/> Exam Products <hr/> Exam Solutions <hr/> Exam Partners <hr/> Related Exams <hr/> Course Exams <hr/> Certification Exams <hr/> Exam Registrations <hr/> Courses |
| Fund Page Partner Sales Representative Layout | Fund Requests (if needed) |
| Fund Request Page Partner Sales Representative Layout | Attachments <hr/> Notes <hr/> Open Activities |

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|--|
| | Completed Activities <hr/> Audit Trail |
| Lead Page Partner Sales Representative Layout | Lead Partners <hr/> Open Activities <hr/> Completed Activities <hr/> Attachments <hr/> Lead Qualification Scripts |
| MDF Request Page Partner Sales Representative Layout | Activities <hr/> Books <hr/> MDF Request Team <hr/> MDF Request Attachments <hr/> Audit Trail |
| Objective Page Partner Sales Representative Layout | Activities <hr/> Objective Team <hr/> Leads <hr/> Deal Registrations <hr/> Opportunities <hr/> Special Pricing Requests <hr/> MDF Requests <hr/> Service Requests |
| Opportunity Page Partner Sales Representative Layout | Opportunity Partners <hr/> Leads |

| Page Layout | Related Information Sections in the Displayed Information Section |
|---|--|
| | <p>Opportunity Team</p> <hr/> <p>Contacts</p> <hr/> <p>Product Revenues</p> <hr/> <p>Notes</p> <hr/> <p>Open Activities</p> <hr/> <p>Completed Activities</p> <hr/> <p>Opportunity Competitors</p> <hr/> <p>Audit Trail</p> <hr/> <p>Books</p> <hr/> <p>Deal Registrations (if needed)</p> <hr/> <p>Special Pricing Requests (if needed)</p> |
| <p>Partner Program Page Partner Sales Representative Layout</p> | <p>Partner Program Attachment</p> <hr/> <p>Audit Trail</p> |
| <p>Service Request Page Partner Sales Representative Layout</p> | <p>Solutions</p> <hr/> <p>Open Activities</p> <hr/> <p>Completed Activities</p> <hr/> <p>Notes</p> <hr/> <p>Audit Trail</p> <hr/> <p>Attachments</p> <hr/> <p>Service Request Team</p> <hr/> <p>Books</p> |
| <p>Solution Page Partner Sales Representative Layout</p> | <p>Attachments</p> |

| Page Layout | Related Information Sections in the Displayed Information Section |
|--|--|
| Special Pricing Product Page Partner Sales Representative Layout | None |
| Special Pricing Request Page Partner Sales Representative Layout | Special Pricing Products Activities Books Special Pricing Request Team Special Pricing Request Attachments |

Setting Up Access Profiles for Partner Roles

This task is a step in [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#).

You must set up two profiles for each partner role:

- **Default access profile.** This access profile sets the access levels for records not owned by the user or by the user's group.
- **Owner access profile.** This access profile sets the access levels for the records owned by the user, by the user's group, or by someone who reports to the user (if manager visibility is enabled).

Complete the steps in the following procedure for each required access profile.

To set up the default access and owner access profiles for a partner role

1. In Oracle CRM On Demand, click the Admin link, User Management and Access Controls, and then the Access Profiles view.
2. Click the Copy link on the appropriate profile, as follows:
 - o If you are setting up a default access profile, then click the Copy link on a default access profile that is similar to the one that you want to set up.
 - o If you are setting up an owner access profile, then click the Copy link on an owner access profile that is similar to the one that you want to set up.

For information about which profiles you might copy for the new profiles, see the following:

- o For more information on typical access profiles for the Channel Manager role, see [Access Profiles for the Channel Manager Role](#).
 - o For more information on typical access profiles for the Partner Sales Representative role, see [Access Profiles for the Partner Sales Representative Role](#).
 - o For more information on typical access profiles for the Partner Administrator role, see [Access Profile Settings for the Partner Administrator Role](#).
3. In Step 1 of the Access Profile Wizard, enter a name for the access profile.

For example, enter Partner Sales Representative Default Access Profile or Partner Sales Representative Owner Access Profile.

4. Go to Step 2 (Specify Access Levels), and change the access settings for the top-level profile and the related information items for the role, as necessary. For more information, see the following:
 - o For more information on typical access settings for the Channel Manager role, see [Access Levels for the Channel Manager Role](#).
 - o For more information on typical access settings for the Partner Sales Representative role, see [Access Levels for the Partner Sales Representative Role](#).
5. Click Finish.

Access Profile Settings for the Channel Manager Role

This topic describes the access profile settings that are suggested for the Channel Manager role. It contains the following information:

- [Access Profiles for the Channel Manager Role](#)
- [Access Levels for the Channel Manager Role](#)

Access Profiles for the Channel Manager Role

For the Channel Manager role, you create a copy of the access profiles that are used for the PRM Administrator role.

The following table shows the names of the access profiles that PRM administrators typically configure for the Channel Manager role.

| Access Profile to Copy | Name of New Access Profile for Channel Manager Role |
|----------------------------------|---|
| PRM Admin Default Access Profile | Channel Manager Default Access Profile |
| PRM Admin Owner Access Profile | Channel Manager Owner Access Profile |

Access Levels for the Channel Manager Role

Do not change any of the settings in the new access profiles for the Channel Manager role unless your company has a requirement to change the settings. However, if your company wants to use partner plans and partner campaigns, then you must configure the settings shown in the following table in the access profiles for the Channel Manager role.

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------|---------------------------|----------------|--------------|
| Partner | Partner Campaigns | Full | Full |
| Partner | Partner Plans | Full | Full |

Access Profile Settings for the Partner Sales Representative Role

This topic describes the access profile settings that are suggested for the Partner Sales Representative role. It contains the following information:

- [Access Profiles for the Partner Sales Representative Role](#)
- [Access Levels for the Partner Sales Representative Role](#)

Access Profiles for the Partner Sales Representative Role

For the Partner Sales Representative role, you create a copy of the access profiles used for the Field Sales Representative role. The following table shows the names of the access profiles that PRM administrators typically configure for the Partner Sales Representative role.

| Access Profile to Copy | Name of New Access Profile for Partner Sales Representative |
|--|---|
| Field Sales Rep Default Access Profile | Partner Sales Representative Default Access Profile |
| Field Sales Rep Owner Access Profile | Partner Sales Representative Owner Access Profile |

Access Levels for the Partner Sales Representative Role

The following table shows the access levels for the top-level profile that PRM administrators typically configure for the Partner Sales Representative role.

| Record Type | Default Access | Owner Access |
|--------------------------------|------------------|------------------|
| Accreditation | Read-Only | Read/Edit/Delete |
| Accreditation Attachment | Read-Only | Read-Only |
| Accreditation Certification | Read-Only | Read-Only |
| Accreditation Product | Read-Only | Read-Only |
| Accreditation Product Category | Read-Only | Read-Only |
| Accreditation Request | Read/Edit/Delete | Read/Edit/Delete |
| Accreditation Solution | Read-Only | Read-Only |

| Record Type | Default Access | Owner Access |
|-----------------------------------|------------------|------------------|
| Activity | View | View |
| Books | Read-Only | Read-Only |
| Campaign | Read-Only | Read-Only |
| Certification | Read-Only | Read/Edit/Delete |
| Certification Attachment | Read-Only | Read-Only |
| Certification Course | Read-Only | Read-Only |
| Certification Exam | Read-Only | Read-Only |
| Certification Product | Read-Only | Read-Only |
| Certification Product Category | Read-Only | Read-Only |
| Certification Request | Read/Edit/Delete | Read/Edit/Delete |
| Certification Solution | Read-Only | Read-Only |
| Contact | Read-Only | Read/Edit/Delete |
| Course | Read-Only | Read/Edit/Delete |
| Course Attachment | Read-Only | Read-Only |
| Course Enrollment | Read/Edit/Delete | Read/Edit/Delete |
| Course Exam | Read-Only | Read-Only |
| Course Partner | Read-Only | Read-Only |
| Course Product | Read-Only | Read-Only |
| Course Product Category | Read-Only | Read-Only |
| Course Solution | Read-Only | Read-Only |
| Deal Registration | Read-Only | Read/Edit/Delete |
| Deal Registration Product Revenue | Read-Only | Read/Edit/Delete |

| Record Type | Default Access | Owner Access |
|-----------------------|------------------|------------------|
| Exam | Read-Only | Read/Edit/Delete |
| Exam Attachment | Read-Only | Read-Only |
| Exam Partner | Read-Only | Read-Only |
| Exam Product | Read-Only | Read-Only |
| Exam Product Category | Read-Only | Read-Only |
| Exam Registration | Read/Edit/Delete | Read/Edit/Delete |
| Exam Solution | Read-Only | Read-Only |
| Forecast | Read-Only | Read/Edit |
| Fund | Read-Only | Read-Only |
| Fund Request | Read-Only | Read/Edit/Delete |
| Lead | Read/Edit | Read/Edit/Delete |
| MDF Request | Read-Only | Read/Edit/Delete |
| Objective | Read-Only | Read-Only |
| Opportunity | Read/Edit | Read/Edit/Delete |
| Partner | Read-Only | Read-Only |
| Partner Program | Read-Only | Read-Only |
| Program Membership | Read-Only | Read-Only |
| Related Accreditation | Read-Only | Read-Only |
| Related Certification | Read-Only | Read-Only |
| Related Course | Read-Only | Read-Only |
| Related Exam | Read-Only | Read-Only |
| Service Request | Read-Only | Read-Edit |

| Record Type | Default Access | Owner Access |
|-------------------------|----------------|------------------|
| Solution | Read-Only | Read-Only |
| Special Pricing Product | Read-Only | Read/Edit/Delete |
| Special Pricing Request | Read-Only | Read/Edit/Delete |

The following table shows the access levels for the related information items that PRM administrators typically configure for the Partner Sales Representative role.

| Record Type | Related Information Items | Default Access | Owner Access |
|---------------|----------------------------------|-----------------|--------------|
| Accreditation | Accreditation Attachments | Read-Only | Full |
| Accreditation | Accreditation Certifications | Read-Only | Full |
| Accreditation | Accreditation Product Categories | Read-Only | Full |
| Accreditation | Accreditation Products | Read-Only | Full |
| Accreditation | Accreditation Requests | Inherit Primary | View |
| Accreditation | Accreditation Solutions | Read-Only | Full |
| Accreditation | Accreditation Teams | No Access | Full |
| Accreditation | Books | No Access | Full |
| Accreditation | Related Accreditations | Read-Only | Full |
| Application | Activities | No Access | No Access |
| Application | Application Attachments | No Access | No Access |
| Application | Application Teams | No Access | No Access |
| Application | Audit Trail | No Access | No Access |
| Application | Books | No Access | No Access |
| Business Plan | Accreditation Requests | No Access | No Access |
| Business Plan | Activities | No Access | No Access |

| Record Type | Related Information Items | Default Access | Owner Access |
|---------------|----------------------------------|-----------------|--------------|
| Business Plan | Business Plan Teams | No Access | No Access |
| Business Plan | Business Plans | No Access | No Access |
| Business Plan | Objectives | No Access | No Access |
| Certification | Accreditation Certifications | Read-Only | Full |
| Certification | Books | No Access | Full |
| Certification | Certification Attachments | Read-Only | Full |
| Certification | Certification Courses | Read-Only | Full |
| Certification | Certification Exams | Read-Only | Full |
| Certification | Certification Product Categories | Read-Only | Full |
| Certification | Certification Products | Read-Only | Full |
| Certification | Certification Requests | Inherit Primary | View |
| Certification | Certification Solutions | Read-Only | Full |
| Certification | Certification Teams | No Access | Full |
| Certification | Related Certifications | Read-Only | Full |
| Contact | Accreditations | Read-Only | Read-Only |
| Contact | Certification Requests | Inherit Primary | View |
| Contact | Certifications | Read-Only | Read-Only |
| Contact | Course Enrollments | Inherit Primary | View |
| Contact | Courses | Read-Only | Read-Only |
| Contact | Exam Registrations | Inherit Primary | View |
| Contact | Exams | Read-Only | Read-Only |
| Course | Books | No Access | Full |

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------------|------------------------------------|-----------------|--------------|
| Course | Certification Courses | Read-Only | Full |
| Course | Course Attachments | Read-Only | Full |
| Course | Course Enrollments | Inherit Primary | View |
| Course | Course Exams | Read-Only | Full |
| Course | Course Partners | Read-Only | Full |
| Course | Course Product Categories | Read-Only | Full |
| Course | Course Products | Read-Only | Full |
| Course | Course Solutions | Read-Only | Full |
| Course | Course Teams | No Access | Full |
| Course | Related Courses | Read-Only | Full |
| Deal Registration | Activities | View | View |
| Deal Registration | Audit Trail | Read-Only | Read-Only |
| Deal Registration | Books | No Access | No Access |
| Deal Registration | Custom Objects (All) | No Access | No Access |
| Deal Registration | Deal Registration Product Revenues | Read-Only | Full |
| Deal Registration | Special Pricing Requests | View | View |
| Exam | Books | No Access | Full |
| Exam | Certification Exams | Read-Only | Full |
| Exam | Course Exams | Read-Only | Full |
| Exam | Courses | Read-Only | Read-Only |
| Exam | Exam Attachments | Read-Only | Full |
| Exam | Exam Partners | Read-Only | Full |

| Record Type | Related Information Items | Default Access | Owner Access |
|--------------|---------------------------|-----------------|--------------|
| Exam | Exam Product Categories | Read-Only | Full |
| Exam | Exam Products | Read-Only | Full |
| Exam | Exam Registrations | Inherit Primary | View |
| Exam | Exam Solutions | Read-Only | Full |
| Exam | Exam Teams | No Access | Full |
| Exam | Related Exams | Read-Only | Full |
| Fund | Activities | View | View |
| Fund | Attachments | No Access | No Access |
| Fund | Audit Trail | No Access | No Access |
| Fund | Books | No Access | No Access |
| Fund | Credits | No Access | No Access |
| Fund | Custom Objects (All) | No Access | No Access |
| Fund | Debits | No Access | No Access |
| Fund | Fund Requests | No Access | No Access |
| Fund | MDF Requests | No Access | No Access |
| Fund | Notes | No Access | No Access |
| Fund | Participants | No Access | No Access |
| Fund | Partner | No Access | No Access |
| Fund | Special Pricing Requests | No Access | No Access |
| Fund Request | Attachments | Full | Full |
| Fund Request | Audit Trail | Read-Only | Read-Only |
| Fund Request | Completed Activities | View | View |

| Record Type | Related Information Items | Default Access | Owner Access |
|--------------|---------------------------|----------------|--------------|
| Fund Request | Custom Objects (All) | No Access | No Access |
| Fund Request | Notes | Full | Full |
| Fund Request | Open Activities | View | View |
| Lead | Attachments | Full | Full |
| Lead | Books | No Access | No Access |
| Lead | Completed Activities | View | View |
| Lead | Lead Assessment | No Access | No Access |
| Lead | Open Activities | View | View |
| Lead | Partner | Full | Full |
| MDF Request | Activities | View | View |
| MDF Request | Audit Trail | Read-Only | Read-Only |
| MDF Request | Books | Read-Only | Read-Only |
| MDF Request | Custom Objects (All) | No Access | No Access |
| MDF Request | MDF Request Attachments | Read-Only | Full |
| MDF Request | MDF Request Teams | Read-Only | Full |
| Objective | Accreditation Requests | Read-Only | View |
| Objective | Accreditations | Read-Only | View |
| Objective | Activities | Read-Only | View |
| Objective | Certification Requests | Read-Only | View |
| Objective | Certifications | Read-Only | View |
| Objective | Course Enrollments | Read-Only | View |
| Objective | Courses | Read-Only | View |

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------|---------------------------|----------------|--------------|
| Objective | Deal Registrations | Read-Only | View |
| Objective | Exam Registrations | Read-Only | View |
| Objective | Exams | Read-Only | View |
| Objective | Leads | Read-Only | View |
| Objective | MDF Requests | Read-Only | View |
| Objective | Objective Attachments | No Access | No Access |
| Objective | Objective Teams | Read-Only | Full |
| Objective | Objectives | Read-Only | View |
| Objective | Opportunities | Read-Only | View |
| Objective | Service Requests | Read-Only | View |
| Objective | Special Pricing Requests | Read-Only | View |
| Opportunity | Attachments | Full | Full |
| Opportunity | Audit Trail | Read-Only | Read-Only |
| Opportunity | Books | Read-Only | Read-Only |
| Opportunity | Completed Activities | View | View |
| Opportunity | Contacts | Full | Full |
| Opportunity | Custom Objects (All) | No Access | No Access |
| Opportunity | Deal Registrations | View | View |
| Opportunity | Leads | View | View |
| Opportunity | Notes | Full | Full |
| Opportunity | Open Activities | View | View |
| Opportunity | Opportunity Assessment | No Access | No Access |

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------|---|-----------------|--------------|
| Opportunity | Opportunity Competitors | Full | Full |
| Opportunity | Opportunity Partners | Full | Full |
| Opportunity | Opportunity Team | Full | Full |
| Opportunity | Revenues | Full | Full |
| Opportunity | Special Pricing Requests | View | View |
| Partner | Account | No Access | No Access |
| Partner | Account (For the originating partner, use Partner Account instead of Accounts.) | No Access | No Access |
| Partner | Accreditation Requests | Inherit Primary | View |
| Partner | Addresses | No Access | No Access |
| Partner | Applications | No Access | No Access |
| Partner | Attachments | No Access | No Access |
| Partner | Audit Trail | No Access | No Access |
| Partner | Books | No Access | No Access |
| Partner | Completed Activities | No Access | No Access |
| Partner | Contacts | No Access | No Access |
| Partner | Course Enrollments | Inherit Primary | View |
| Partner | Course Partners | Read-Only | Read-Only |
| Partner | Custom Objects 01 | No Access | No Access |
| Partner | Custom Objects 02 | No Access | No Access |
| Partner | Custom Objects 03 | No Access | No Access |
| Partner | Deal Registrations (Originating Partner) | No Access | No Access |

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------|--|-----------------|--------------|
| Partner | Deal Registrations (Owner Partner) | No Access | No Access |
| Partner | Deal Registrations (Principal Partner) | No Access | No Access |
| Partner | Exam Partners | Read-Only | Read-Only |
| Partner | Exam Registrations | Inherit Primary | View |
| Partner | Fund | No Access | No Access |
| Partner | Fund Requests | No Access | No Access |
| Partner | Fund Requests (Owner Partner) | No Access | No Access |
| Partner | Fund Requests (Principal Partner) | No Access | No Access |
| Partner | Lead | No Access | No Access |
| Partner | Lead (Originating Partner) | No Access | No Access |
| Partner | Lead (Owner partner) | No Access | No Access |
| Partner | MDF Requests | No Access | No Access |
| Partner | MDF Requests (Originating Partner) | No Access | No Access |
| Partner | MDF Requests (Principal Partner) | No Access | No Access |
| Partner | Notes | No Access | No Access |
| Partner | Open Activities | No Access | No Access |
| Partner | Opportunity | No Access | No Access |
| Partner | Opportunity (Origination Partners) | No Access | No Access |
| Partner | Opportunity (Owner Partner) | No Access | No Access |
| Partner | Partner Campaigns | No Access | No Access |
| Partner | Partner Organization Books | No Access | No Access |

| Record Type | Related Information Items | Default Access | Owner Access |
|--------------------|---|----------------|--------------|
| Partner | Partner Plans | No Access | No Access |
| Partner | Partner Relationships | No Access | No Access |
| Partner | Partner Special Pricing Requests | No Access | No Access |
| Partner | Partner Teams | No Access | No Access |
| Partner | Partner Types | No Access | No Access |
| Partner | Partners | No Access | No Access |
| Partner | Policies | No Access | No Access |
| Partner | Program Membership | No Access | No Access |
| Partner | Special Pricing Requests | No Access | No Access |
| Partner | Special Pricing Requests (Owner Partner) | No Access | No Access |
| Partner | Special Pricing Requests (Principal partners) | No Access | No Access |
| Partner Program | Audit Trail | Read-Only | Read-Only |
| Partner Program | Books | No Access | No Access |
| Partner Program | Deal Registrations | No Access | No Access |
| Partner Program | Fund Requests | No Access | No Access |
| Partner Program | MDF Requests | No Access | No Access |
| Partner Program | Opportunities | No Access | No Access |
| Partner Program | Partner Program Attachments | No Access | No Access |
| Partner Program | Program Membership | No Access | No Access |
| Partner Program | Special Pricing Requests | No Access | No Access |
| Program Membership | Attachments | Read-Only | Read-Only |
| Service Request | Attachments | Read-Only | Full |

| Record Type | Related Information Items | Default Access | Owner Access |
|-------------------------|-------------------------------------|----------------|--------------|
| Service Request | Audit Trail | Read-Only | Read-Only |
| Service Request | Books | Read-Only | Full |
| Service Request | Completed Activities | Read-Only | View |
| Service Request | Notes | Read-Only | Full |
| Service Request | Open Activities | Read-Only | View |
| Service Request | Service Request Teams | Read-Only | Full |
| Service Request | Solutions | View | View |
| Service Request | SR Assessment | Read-Only | View |
| Solution | Attachments | Full | Full |
| Solution | Custom Objects (All) | No Access | No Access |
| Solution | Related Solutions | View | View |
| Solution | Service Requests | View | View |
| Solution | Solution Product | View | View |
| Special Pricing Request | Activities | Read-Only | View |
| Special Pricing Request | Audit Trail | Read-Only | Read-Only |
| Special Pricing Request | Books | Read-Only | Read-Only |
| Special Pricing Request | Custom Objects (All) | No Access | No Access |
| Special Pricing Request | Partner Special Pricing Requests | No Access | No Access |
| Special Pricing Request | Special Pricing Products | Read-Only | Full |
| Special Pricing Request | Special Pricing Request Attachments | Read-Only | Full |
| Special Pricing Request | Special Pricing Request Teams | Read-Only | Full |

Access Profile Settings for the Partner Administrator Role

The access profiles for the Partner Administrator Role are copies of the access profiles for the Partner Sales Representative role. The following table shows the names of the access profiles that PRM administrators typically configure for the Partner Administrator role.

| Access Profile to Copy | New Access Profile Name for Partner Administrator Role |
|---|--|
| Partner Sales Representative Default Access Profile | Partner Administrator Default Access profile |
| Partner Sales Representative Owner Access Profile | Partner Administrator Owner Access profile |

Creating Partner Roles


This task is a step in [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#).

Complete the steps in the following procedure to create a partner role.

To create a partner role

1. In Oracle CRM On Demand, click Admin, User Management and Access Controls, and then Role Management.
2. Click the Copy link on an existing role that is similar to the role that you want to create.

For example, to create the Channel Manager role, copy the PRM Administrator role. To create the Partner Sales Representative role, copy the Field Sales Representative role.

 **Note:** The Partner Administrator role is usually created by copying the Partner Sales Representative role after that role is fully set up. For information about the settings for the Partner Administrator role, see [Role Settings for the Partner Administrator Role](#).

The Role Management Wizard opens.

3. In Step 1 of the Role Management Wizard, enter the role name (for example, Channel Manager) and a description.
4. In Step 2 of the Role Management Wizard (Record Type Access) change the settings for the role, as necessary. For more information, see the following:
 - o For more information on typical access settings for the Channel Manager role, see [Record Type Access for the Channel Manager Role](#).
 - o For more information on typical access settings for the Partner Sales Representative role, see [Record Type Access for the Partner Sales Representative Role](#).
5. In the Role Management Wizard, go to Step 3 (Access Profiles), and select the access profiles that you created earlier for the role.

6. In the Role Management Wizard, go to Step 4 (Privileges), and change the settings for the role, as necessary. For more information, see the following:
 - o For more information on typical privilege settings for the Channel Manager role, see [Privileges for the Channel Manager Role](#).
 - o For more information on typical privilege settings for the Partner Sales Representative role, see [Privileges for the Partner Sales Representative Role](#).
 - o For more information on typical privilege settings for the Partner Administrator role, see [Role Settings for the Partner Administrator Role](#).
7. In the wizard, go to Step 5 (Tab Access & Order), and change the settings for the role as needed. For more information, see the following:
 - o For more information on typical tab settings for the Channel Manager role, see [Tab Access and Order for the Channel Manager Role](#).
 - o For more information on typical tab settings for the Partner Sales Representative role, see [Tab Access and Order for the Partner Sales Representative Role](#).
8. In the wizard, go to Step 6 (Page Layout Assignment), and assign a page layout to each record type. For more information, see the following:
 - o For more information on typical page layout assignments for the Channel Manager role, see [Page Layouts Assigned to the Channel Manager Role](#).
 - o For more information on typical page layout assignments for the Partner Sales Representative role, see [Page Layouts Assigned to the Partner Sales Representative Role](#).
9. In the wizard, go to Step 7 (Search Layout Assignment), and assign a search layout to each record type. For information about setting up search layouts, see [Oracle CRM On Demand Online Help](#) .
10. In the wizard, go to Step 8 (Homepage Layout Assignment), and assign a home page layout for each record type. For information about setting up layouts, see [Oracle CRM On Demand Online Help](#) .
11. Click Finish.

Role Settings for the Channel Manager Role

This topic describes the typical role settings for the Channel Manager role. It contains the following information:

- [Record Type Access for the Channel Manager Role](#)
- [Privileges for the Channel Manager Role](#)
- [Tab Access and Order for the Channel Manager Role](#)
- [Page Layouts Assigned to the Channel Manager Role](#)

Record Type Access for the Channel Manager Role

Do not change any of the settings in the record type access for the Channel Manager role unless your company has a requirement to change the settings. However, if your company wants to use partner plans and partner campaigns, then you must configure the record type access shown in the following table for the Channel Manager role.

| Record Type | Has Access | Can Create | Can Read All Records |
|------------------|------------|------------|----------------------|
| Partner Campaign | Selected | Selected | Selected |

| Record Type | Has Access | Can Create | Can Read All Records |
|--------------|------------|------------|----------------------|
| Partner Plan | Selected | Selected | Selected |

Privileges for the Channel Manager Role

The Channel Manager role is copied from the PRM Administrator role, and therefore the Channel Manager role initially has the same privileges as the PRM Administrator role. For the Channel Manager role, company administrators typically change some of the privilege settings.

The following table shows the privilege settings that company administrators typically change for the Channel Manager role.

▲ CAUTION: Unless it is a requirement for your company, do not change the settings for the other privileges for the Channel Manager role (copied from the PRM Administrator role). If you do, then you risk interrupting data processing within Oracle CRM On Demand.

| Category | Privilege | Assign |
|-----------------------|---|--------------|
| Customization: Data | Customize Application - Manage Custom Object 01 | Not Selected |
| Customization: Data | Customize Application - Manage Custom Object 02 | Not Selected |
| Customization: Data | Customize Application - Manage Custom Object 03 | Not Selected |
| Customization: Data | Customize Application - Manage Custom Object 04-10 | Not Selected |
| Customization: Data | Customize Application - Manage Custom Object 11- 15 | Not Selected |
| Customization: Layout | Customize Application - Manage Dynamic Layouts | Not Selected |
| Customization: Layout | Customize Application - Manage Homepage Customization | Not Selected |
| Customization | Customize Application | Not Selected |
| PRM | Convert Deal Registrations | Selected |

Tab Access and Order for the Channel Manager Role

Do not change any of the settings in the tab access and order for the Channel Manager role (copied from the PRM Administrator role) unless your company has a requirement to change the settings.

Page Layouts Assigned to the Channel Manager Role

The following table shows the page layouts that company administrators typically assign to the Channel Manager role.

| Record Type | Page Layout |
|-----------------------|---|
| Accreditation | Accreditation Page Channel Manager Layout |
| Accreditation Request | Accreditation Request Page Channel Manager Layout |
| Application | Application Page Channel Manager Layout |
| Business Plan | Business Plan Page Channel Manager Layout |
| Certification | Certification Page Channel Manager Layout |
| Certification Request | Certification Request Page Channel Manager Layout |
| Course | Course Page Channel Manager Layout |
| Course Enrollment | Course Enrollment Page Channel Manager Layout |
| Deal Registration | Deal Registration Page Channel Manager Layout |
| Exam | Exam Page Channel Manager Layout |
| Exam Registration | Exam Registration Page Channel Manager Layout |
| Fund | Fund Page Channel Manager Layout |
| Fund Request | Fund Request Page Channel Manager Layout |
| Lead | Lead Page Channel Manager Layout |
| MDF Request | MDF Request Page Channel Manager Layout |
| Objective | Objective Page Channel Manager Layout |
| Opportunity | Opportunity Page Channel Manager Layout |
| Partner | Partner Page Channel Manager Layout |
| Price List | Price List Page Channel Manager Layout |

| Record Type | Page Layout |
|-------------------------|---|
| Price List Line Item | Price List Line Item Page Channel Manager Layout |
| Service Request | Service Request Page Channel Manager Layout |
| Solution | Solution Page Channel Manager Layout |
| Special Pricing Product | Special Pricing Product Page Channel Manager Layout |
| Special Pricing Request | Special Pricing Request Page Channel Manager Layout |

Role Settings for the Partner Sales Representative Role

This topic describes the typical role settings for the Partner Sales Representative role. It includes the following:

- [Record Type Access for the Partner Sales Representative Role](#)
- [Privileges for the Partner Sales Representative Role](#)
- [Tab Access and Order for the Partner Sales Representative Role](#)
- [Page Layouts Assigned to the Partner Sales Representative Role](#)

Record Type Access for the Partner Sales Representative Role

The following table shows the record type access for partner relationship management that company administrators typically configure for the Partner Sales Representative role.

| Record Type | Has Access | Can Create | Can Read All Records |
|--------------------------------|------------|--------------|----------------------|
| Account | Selected | Not selected | Not selected |
| Accreditation | Selected | Not selected | Not selected |
| Accreditation Attachment | Selected | Not selected | Not selected |
| Accreditation Certification | Selected | Not selected | Not selected |
| Accreditation Product | Selected | Not selected | Not selected |
| Accreditation Product Category | Selected | Not selected | Not selected |
| Accreditation Request | Selected | Selected | Not selected |
| Accreditation Solution | Selected | Not selected | Not selected |

| Record Type | Has Access | Can Create | Can Read All Records |
|--------------------------------|--------------|--------------|----------------------|
| Activity | Selected | Selected | Not selected |
| Applications | Not selected | Not selected | Not selected |
| Assessment | Selected | Selected | Not selected |
| Asset | Selected | Not selected | Not selected |
| Books | Selected | Not selected | Not selected |
| Business Plan | Not selected | Not selected | Not selected |
| Campaign | Selected | Not selected | Not selected |
| Certification | Selected | Not selected | Not selected |
| Certification Attachment | Selected | Not selected | Not selected |
| Certification Course | Selected | Not selected | Not selected |
| Certification Exam | Selected | Not selected | Not selected |
| Certification Product | Selected | Not selected | Not selected |
| Certification Product Category | Selected | Not selected | Not selected |
| Certification Request | Selected | Selected | Not selected |
| Certification Solution | Selected | Not selected | Not selected |
| Contact | Selected | Selected | Not selected |
| Course | Selected | Not selected | Not selected |
| Course Attachment | Selected | Not selected | Not selected |
| Course Enrollment | Selected | Selected | Not selected |
| Course Exam | Selected | Not selected | Not selected |
| Course Partner | Selected | Not selected | Not selected |
| Course Product | Selected | Not selected | Not selected |

| Record Type | Has Access | Can Create | Can Read All Records |
|-----------------------------------|--------------|--------------|----------------------|
| Course Product Category | Selected | Not selected | Not selected |
| Course Solution | Selected | Not selected | Not selected |
| Deal Registration | Selected | Selected | Not selected |
| Deal Registration Product Revenue | Selected | Selected | Not Selected |
| Exam | Selected | Not selected | Not selected |
| Exam Attachment | Selected | Not selected | Not selected |
| Exam Partner | Selected | Not selected | Not selected |
| Exam Product | Selected | Not selected | Not selected |
| Exam Product Category | Selected | Not selected | Not selected |
| Exam Registration | Selected | Selected | Not selected |
| Exam Solution | Selected | Not selected | Not selected |
| Forecast | Selected | Selected | Not selected |
| Fund | Selected | Not selected | Not selected |
| Fund Request | Selected | Selected | Not selected |
| Household | Not selected | Not selected | Not selected |
| Lead | Selected | Selected | Not selected |
| MDF Request | Selected | Selected | Not selected |
| Objective | Selected | Selected | Not selected |
| Opportunity | Selected | Selected | Not selected |
| Partner | Selected | Not selected | Not selected |
| Partner Campaigns | Not selected | Not selected | Not selected |
| Partner Plans | Not selected | Not selected | Not selected |


| Record Type | Has Access | Can Create | Can Read All Records |
|---------------------------------|--------------|--------------|----------------------|
| Partner Program | Selected | Not selected | Not selected |
| Partner Special Pricing Request | Not selected | Not selected | Not selected |
| Program Membership | Selected | Not selected | Not selected |
| Related Accreditation | Selected | Not selected | Not selected |
| Related Certification | Selected | Not selected | Not selected |
| Related Course | Selected | Not selected | Not selected |
| Related Exam | Selected | Not selected | Not selected |
| Service Request | Selected | Selected | Not selected |
| Solution | Selected | Not selected | Selected |
| Special Pricing Product | Selected | Selected | Not selected |
| Special Pricing Request | Selected | Selected | Not selected |

Privileges for the Partner Sales Representative Role

Oracle CRM On Demand groups privileges together in categories. The following table shows the privileges settings that company administrators typically configure for the Partner Sales Representative role.

| Category | Privilege | Assign |
|---------------|--|----------|
| Analytics | Access Analytics Dashboards - View Prebuilt Dashboards | Selected |
| Analytics | Access Analytics Reports - View Prebuilt Analyses | Selected |
| Analytics | Access V3 Analytics | Selected |
| CRM:Marketing | Archive Leads | Selected |
| CRM:Marketing | Convert Leads | Selected |
| CRM:Marketing | Partner Offerings | Selected |
| CRM:Marketing | Qualify Leads | Selected |

| Category | Privilege | Assign |
|-------------------------|---------------------------------|--------------|
| CRM:Marketing | Reject Leads | Selected |
| CRM:Partners | Manage Fund Requests Access | Selected |
| CRM:Partners | Manage Funds Access | Selected |
| CRM | Share Calendar | Selected |
| Data Management: Export | List: Export All Fields | Selected |
| Data Management: Export | List: Export Displayed Fields | Selected |
| Data Management | Mass Update Any Field | Selected |
| Desktop/Mobile | Outlook/Notes Email Integration | Selected |
| Integration:Widgets | Embed CRM On Demand Widgets | Selected |
| My Setup | Personalize Homepages | Selected |
| My Setup | Reset Personal Password | Selected |
| PRM | Manage PRM Books and Workflows | Selected |
| PRM | Convert Deal Registrations | Not Selected |
| PRM | Manage PRM Access | Not Selected |

 **Note:** When a user in the partner organization searches for a user in a Lookup window, users in the brand owner company are never returned by the search by default. Only users in the partner organization are returned. If the company administrator wants users in the partner organization to be able to select users in the brand owner company in Lookup windows, then the company administrator can enable the View Brand Owner Users in Lookup privilege in the role of the relevant users in the partner organization. The View Brand Owner Users in Lookup privilege is not enabled by default for any role, but users who have the Manage PRM Access privilege in their role can enable the View Brand Owner Users in Lookup privilege for their own role and other roles.

Tab Access and Order for the Partner Sales Representative Role

The following table shows the tab access and order settings that company administrators typically configure for the Partner Sales Representative role.

| Tab | Move to |
|--------------------|---------------|
| Homepage | Selected Tabs |
| Calendar | Selected Tabs |
| Leads | Selected Tabs |
| Opportunity | Selected Tabs |
| Fund | Selected Tabs |
| Solution | Selected Tabs |
| Partner Program | Selected Tabs |
| Partner | Not selected |
| Deal Registrations | Selected Tabs |
| SP Requests | Selected Tabs |
| MDF Requests | Selected Tabs |
| Applications | Selected Tabs |
| Service | Selected Tabs |
| Objective | Selected Tabs |
| Accreditations | Selected Tabs |
| Certifications | Selected Tabs |
| Courses | Selected Tabs |
| Exams | Selected Tabs |

Page Layouts Assigned to the Partner Sales Representative Role

The following table shows the page layouts that company administrators typically assign to the Partner Sales Representative role.

| Record Type | Page Layout Name |
|-----------------------------|--|
| Accreditation | Accreditation Page Partner Sales Representative Layout |
| Accreditation Request | Accreditation Request Page Partner Sales Representative Layout |
| Application | Application Page Partner Sales Representative Layout |
| Certification | Certification Page Partner Sales Representative Layout |
| Certification Request | Certification Request Page Partner Sales Representative Layout |
| Course | Course Page Partner Sales Representative Layout |
| Course Enrollment | Course Enrollment Page Partner Sales Representative Layout |
| Deal Registration | Deal Registration Page Partner Sales Representative Layout |
| Exam | Exam Page Partner Sales Representative Layout |
| Exam Registration | Exam Registration Page Partner Sales Representative Layout |
| Fund | Fund Page Partner Sales Representative Layout |
| Fund Request | Fund Request Page Partner Sales Representative Layout |
| Lead | Lead Page Partner Sales Representative Layout |
| MDF Request | MDF Request Page Sales Representative Layout |
| Objective | Objective Page Partner Sales Representative Layout |
| Opportunity | Opportunity Page Partner Sales Representative Layout |
| Opportunity Product Revenue | Opportunity Product Revenue Page Standard Layout |
| Partner Program | Partner Program Page Partner Sales Representative Layout |
| Product | Product Page Standard Layout |
| Service Request | Service Request Page Partner Representative Layout |
| Solution | Solution Page Partner Sales Representative Page Layout |
| Special Pricing Product | Special Pricing Product Page Sales Representative Layout |


| Record Type | Page Layout Name |
|-------------------------|--|
| Special Pricing Request | Special Pricing Request Page Sales Representative Layout |
| Task | Task Page Standard Layout |

Role Settings for the Partner Administrator Role

Typically, the Partner Administrator role is created by copying the Partner Sales Representative role and then enabling an additional privilege for the new role. The following table shows the additional privilege that you enable for the Partner Administrator role.

| Category | Privilege | Assign |
|----------|--|----------|
| PRM | Manage Users within the Partner Organization | Selected |

The Manage Users within the Partner Organization privilege allows the user with the Partner Administrator role to edit and create users. Partner administrators will have access only to users within their own organization. For information about adding users to a partner organization, see [Adding Partner Users](#).

 **Note:** When a user in the partner organization searches for a user in a Lookup window, users in the brand owner company are never returned by the search by default. Only users in the partner organization are returned. If the company administrator wants users in the partner organization to be able to select users in the brand owner company in Lookup windows, then the company administrator can enable the View Brand Owner Users in Lookup privilege in the role of the relevant users in the partner organization. The View Brand Owner Users in Lookup privilege is not enabled by default for any role, but users who have the Manage PRM Access privilege in their role can enable the View Brand Owner Users in Lookup privilege for their own role and other roles.

Adding Partner Users

This task is a step in [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#).

A **partner user** is a user who has the Partner Organization field populated on her user record, and thus has access to the records for that partner organization. You can configure existing users to be partner users, and you can add new partner users.

Complete the following procedures to configure partner users. You must first configure the User Admin page layout, then set up a user as a partner user.

The following procedure describes how to configure the User Admin page layout.

To configure the User Admin page layout

1. In Oracle CRM On Demand, click Admin, and then click Application Customization.

2. In the Record Type Setup section, click User.
3. In the Page Layout Management section, click User Admin Page Layout.
4. In the User Admin Page Layout page, click the name link of the page layout that you want to change (that is, the page layout for the role given to users who can create and manage other users, typically the Administrator role).
5. Click the arrows to move the Partner Organization field to the section of the page where you want the field to appear.
6. Click Finish to save your changes.
7. Sign out of Oracle CRM On Demand and sign in again, to activate the changes.

The following procedure describes how to set up a user as a partner user.

To set up a user as a partner user

1. In Oracle CRM On Demand, click Admin.
2. In the User Management and Access Controls section, click User Management and Access Controls.
3. On the User Management and Access Controls page, click User Management.
4. On the User List page, do one of the following:
 - o To add a new user, click New User.
 - o To edit an existing user, click the Edit link beside the user name.
5. In the Partner Organization field on the User Edit page, click the lookup icon, and choose the partner organization with which the user is to be associated.
6. Save your changes.

Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management

This task is a step in [Roadmap for Configuring Oracle CRM On Demand for Partner Relationship Management](#).

Your company can use books and workflow rules to manage user access to partner account records and their associated records. Typically, companies create one book for each partner organization, but it is also possible to use multiple books for one partner organization.

To configure books and workflow rules for Oracle CRM On Demand for Partner Relationship Management, perform the following tasks:

1. [Creating the Partner Organization Book Type](#)
2. [Creating Books for Partner Accounts](#)
3. [Configuring Workflow Rule Actions to Synchronize Partner Accounts](#)

Creating the Partner Organization Book Type

This task is a step in [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#).

To support the use of books for Oracle CRM On Demand for Partner Relationship Management, the PRM administrator creates the partner organization book type. Complete the steps in the following procedure to create the partner organization book type.

To create the partner organization book type

1. In Oracle CRM On Demand, click Admin, and then click Application Customization.
2. In the Record Type Setup section, click Book.
3. In the Book Application Customization page, click Book Field Setup.
4. Click the Edit Picklist link for the Book Type field.
5. Enter the value, Partner Organization, in the picklist, and save your changes.

For more information about editing picklist fields, see *Oracle CRM On Demand Online Help* .

Creating Books for Partner Accounts


This task is a step in [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#).

After the PRM administrator has created the partner organization book type, the channel manager must create books for partner accounts. Complete the steps in the following procedure to create books for partner accounts.

To create books for partner accounts

1. Select the book type of the partner organization.
2. Select the appropriate partner in the Partner field.
3. Save the record.
4. Edit the Book record, and add the users who want access to the partner's organization.

The users added are those people in the partner organization who always have access to the record to which the book is added.


 **Note:** You can optionally create subbooks for your partner account books. For information about creating books and book hierarchies, see *Oracle CRM On Demand Online Help* .

How Books Are Associated with Records

When a partner account is linked to another record, the linked record can also be associated with the partner organization's book. A book can be associated with a record in two ways:

- **By adding the book to the Book related information list on a record.** You can use numerous books to represent a grouping of partner users. The books do not all need to be defined as type: Partner Organization, and they do not all need to have a partner defined. Books with the partner defined will be synchronized to records if the workflows described in this topic are used within the brand owner's implementation. If you want only one partner book synchronized based on the workflow rules, then you have only one book for each partner with the partner defined. Define the other books used for partner users without the specified partner.
- **Automatically, through a workflow rule.** You can create workflow rules with Oracle CRM On Demand for Partner Relationship Management specific actions to support the automatic association and dissociation of partner accounts and partner organization books with records. For example, you can use workflow rules to ensure that when a partner account is linked to an opportunity, the partner organization's book (or books) is also automatically added to the opportunity. This provides visibility to the opportunity record for all users of the partner organization (that is, the users who are associated with the partner organization's book) at one time. Or, you can create a workflow rule that automatically links a partner account to a record when a book associated with the partner account is associated with the record. The workflow rule also removes the partner organization's book from a record when the partner account

is unlinked from the record. When a partner organization's book is removed from the record, the users of the partner organization no longer have visibility to the record by means of the book.

 **Note:** When you trigger the workflow actions for Oracle CRM On Demand for Partner Relationship Management, the partner book that was created automatically does not function properly. Only the manually created books function properly in workflows with Oracle CRM On Demand for Partner Relationship Management.

Configuring Workflow Rule Actions to Synchronize Partner Accounts

This task is a step in [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#).

Complete the following procedure to configure workflow rule actions to synchronize partner account information.

To configure a workflow rule action to synchronize partner account information

1. In Oracle CRM On Demand, click Admin, and then click Workflow Configuration.
2. In the Workflow Rules List page, click New.
3. In the Workflow Rule New page, create and save the workflow rule as follows:
 - a. Enter the name of the workflow rule.
 - b. Select the Active check box.
 - c. In the Record Type field, select Opportunity.
 - d. In the Trigger Event field, select When New Record Saved.
 - e. Save the workflow rule.

For more information about working with workflow rules, see [Oracle CRM On Demand Online Help](#) .

About Workflow Rule Actions Specific to Managing Partner Accounts

The following workflow rule actions are specific to managing partner accounts:

- **Sync Partner Books.** Synchronizes the book associations when a partner account is a separate record not associated with the book. When the relationship of the account to that record is removed, the associated partner books are removed. *Associated partner books* are books where the partner is defined for the specific partner account. For example, when Partner Account A is linked to an opportunity record, all books defined as Partner A are also associated with the opportunity. If the association between the partner account and the opportunity is broken, then this workflow action removes the books for that partner account.
- **Sync Book Partner.** Links a partner account to a record when a book associated with the partner account (and Partner field is specified on the book) is associated with the record. This workflow action also removes the partner account relationship from a record when a book associated with the partner account is removed from the record.


If multiple books are associated with that partner account, then other books associated with the partner account are also synchronized with the record.

- **Sync Owner Partner.** When the record owner is a partner user and the partner organization is populated in the user record, the workflow synchronizes the record owner's partner account, and its associated books with the record. (Associated books are all books associated with that partner using the Partner field.) If the owner is changed, then all the books for the original partner are removed and that partner account is removed. An owner is automatically added to the team when the owner is added to the record. The user will also remain on the team if the user is removed from the Owner field.

Record Types for Which Oracle CRM On Demand for Partner Relationship Management Workflow Rule Actions Are Supported

The record types that support workflow rule actions for partner accounts are as follows:

- Account
- Lead
- Opportunity
- Fund
- Fund Credits
- Fund Debits
- Partner Program

 **Note:** The record type and the trigger event for a workflow rule determine which workflow rule actions are available for the workflow rule.

The following table describes the configuration of workflow rule actions for partner relationship management.

| Workflow Rule Action | Configured for a Specific Record | Trigger Event and Outcome | Comments |
|----------------------|---|--|--|
| Sync Partner Books | Child Record (For example, Account Partner) | When new record is saved. All books associated with the partner account are associated with the child record. | None |
| | | Before record is deleted. All books associated with the partner account are removed from the child record. | None |
| | | Before modified record is saved. If the partner account on the child record was changed, then all books associated with the previous partner account are removed from the child record. | None |
| | | When modified record is saved. If the partner account on the child record was changed, then all books associated with the new partner account are associated with the child record. | None |
| Sync Book Partner | Child record for the book (For example, Account Book) | When new record saved. The book's partner account is associated with the child record for the book. All other books associated with the partner account are also associated with the child record for the book. | Removing a book makes the partner account child record inactive, but it does not delete it. However, removing a partner account child or making it inactive, deletes the book. |

| Workflow Rule Action | Configured for a Specific Record | Trigger Event and Outcome | Comments |
|----------------------|----------------------------------|--|---|
| | | Before record is deleted. The book's partner account is removed from the child record for the book. | |
| Sync Owner Partner | Parent Record (Example: Lead) | <p>When new record saved. The record owner's partner account is associated with the parent record. All books associated with the partner account are also associated with the parent record.</p> <p>Before modified record saved. If the owner of the parent record was changed from a partner user, then the previous owner's partner account is removed from the parent record. All other books associated with the previous record owner's partner account are also removed from the parent record. (Using this workflow action in this instance is optional depending on your business rules.)</p> <p>When modified record saved. If the owner of the parent record was changed to a partner user, then the new owner's partner account and associated books are associated with the parent record.</p> | <p>To ensure that the book information is synchronized, you must specify the workflow rules with the <i>When new record saved</i> trigger, and a rule with the <i>When modified record is saved</i> trigger.</p> <p>However, depending on your company's business rules, you may or may not choose to set up a rule using the <i>Before modified record saved</i> trigger, if your business rules dictate that changing an owner does not necessarily remove the previous owner's partner account and books from the record type.</p> |

Oracle CRM On Demand for Partner Relationship Management Workflow Actions

There are a number of workflow actions that are specific to Oracle CRM On Demand for Partner Relationship Management. Each type of these workflow actions is listed in the following tables. The workflows are listed in the sort order in the Workflow Rules List view.

When a partner book association with a record is changed, the workflow changes the partner account association with the record, as shown in the following table.

| Workflow Name | Workflow Menu Selection | | |
|------------------------|-------------------------|--------------------------|-------------------|
| | Record Type | Trigger Event | Action |
| BPS_AcctBook_NewRecSav | Account Book | When new record is saved | Sync Book Partner |
| BPS_AcctBook_RecDel | Account Book | Before record is deleted | Sync Book Partner |
| BPS_FundBook_NewRecSav | Fund Book | When new record is saved | Sync Book Partner |
| BPS_FundBook_RecDel | Fund Book | Before record is deleted | Sync Book Partner |
| BPS_LeadBook_NewRecSav | Lead Book | When new record is saved | Sync Book Partner |
| BPS_LeadBook_RecDel | Lead Book | Before record is deleted | Sync Book Partner |

| Workflow Name | Workflow Menu Selection | | |
|------------------------|-------------------------|--------------------------|-------------------|
| BPS_OptyBook_NewRecSav | Opportunity Book | When new record is saved | Sync Book Partner |
| BPS_OptyBook_RecDel | Opportunity Book | Before record is deleted | Sync Book Partner |
| BPS_ProgBook_NewRecSav | Program Book | When new record is saved | Sync Book Partner |
| BPS_ProgBook_RecDel | Program Book | Before record is deleted | Sync Book Partner |

When you change the association of a partner user who is the record owner, the workflow associates or disassociates the partner book and partner account with the record as shown in the following table.

| Workflow Name | Workflow Menu Selection | | |
|--------------------------|-------------------------|---------------------------------|--------------------|
| | Record Type | Trigger Event | Action |
| OPS_Acct_BeforeModRecSav | Account | Before modified record is saved | Sync Owner Partner |
| OPS_Acct_ModRecSav | Account | When modified record is saved | Sync Owner Partner |
| OPS_Acct_NewRecSav | Account | When new record is saved | Sync Owner Partner |
| OPS_Fund_BeforeModRecSav | Fund | Before modified record is saved | Sync Owner Partner |
| OPS_Fund_ModRecSav | Fund | When modified record is saved | Sync Owner Partner |
| OPS_Fund_NewRecSav | Fund | When new record is saved | Sync Owner Partner |
| OPS_Lead_BeforeModRecSav | Lead | Before modified record is saved | Sync Owner Partner |
| OPS_Lead_ModRecSav | Lead | When modified record is saved | Sync Owner Partner |
| OPS_Lead_NewRecSav | Lead | When new record is saved | Sync Owner Partner |
| OPS_Opty_BeforeModRecSav | Opportunity | Before modified record is saved | Sync Owner Partner |

| Workflow Name | Workflow Menu Selection | | |
|--------------------------|-------------------------|---------------------------------|--------------------|
| OPS_Opty_ModRecSav | Opportunity | When modified record is saved | Sync Owner Partner |
| OPS_Opty_NewRecSav | Opportunity | When new record is saved | Sync Owner Partner |
| OPS_Prog_BeforeModRecSav | Partner Program | Before modified record is saved | Sync Owner Partner |
| OPS_Prog_ModRecSav | Partner Program | When modified record is saved | Sync Owner Partner |
| OPS_Prog_NewRecSav | Partner Program | When new record is saved | Sync Owner Partner |

When you change the association of a partner account association with a record, the workflow changes the partner book association as shown in the following table.

| Workflow Name | Workflow Menu Selection | | |
|------------------------------|-------------------------|---------------------------------|--------------------|
| | Record Type | Trigger Event | Action |
| PBS_AcctPart_BeforeModRecSav | Account Partner | Before modified record is saved | Sync Partner Books |
| PBS_AcctPart_ModRecSav | Account Partner | When modified record is saved | Sync Partner Books |
| PBS_AcctPart_NewRecSav | Account Partner | When new record is saved | Sync Partner Books |
| PBS_AcctPart_RecDel | Account Partner | Before record is deleted | Sync Partner Books |
| PBS_FundMemb_BeforeModRecSav | Fund Membership | Before modified record is saved | Sync Partner Books |
| PBS_FundMemb_ModRecSav | Fund Membership | When modified record is saved | Sync Partner Books |
| PBS_FundMemb_NewRecSav | Fund Membership | When new record is saved | Sync Partner Books |
| PBS_FundMemb_RecDel | Fund Membership | Before record is deleted | Sync Partner Books |
| PBS_LeadPart_BeforeModRecSav | Lead Partner | Before modified record is saved | Sync Partner Books |

| Workflow Name | Workflow Menu Selection | | |
|------------------------------|-------------------------|---------------------------------|--------------------|
| PBS_LeadPart_ModRecSav | Lead Partner | When modified record is saved | Sync Partner Books |
| PBS_LeadPart_NewRecSav | Lead Partner | When new record is saved | Sync Partner Books |
| PBS_LeadPart_RecDel | Lead Partner | Before record is deleted | Sync Partner Books |
| PBS_OptyPart_BeforeModRecSav | Opportunity Partner | Before modified record is saved | Sync Partner Books |
| PBS_OptyPart_ModRecSav | Opportunity Partner | When modified record is saved | Sync Partner Books |
| PBS_OptyPart_NewRecSav | Opportunity Partner | When new record is saved | Sync Partner Books |
| PBS_OptyPart_RecDel | Opportunity Partner | Before record is deleted | Sync Partner Books |
| PBS_ProgMemb_BeforeModRecSav | Program Membership | Before modified record is saved | Sync Partner Books |
| PBS_ProgMemb_ModRecSav | Program Membership | When modified record is saved | Sync Partner Books |
| PBS_ProgMemb_NewRecSav | Program Membership | When new record is saved | Sync Partner Books |
| PBS_ProgMemb_RecDel | Program Membership | Before record is deleted | Sync Partner Books |

Example of Using a Workflow to Automatically Add a Partner Book to an Opportunity

The following is an Oracle CRM On Demand for Partner Relationship Management example of how to use a workflow to automatically add a Partner Book to an Opportunity when the Partner Organization is related to the Opportunity. This action gives users within the related Partner Book the same level of access to the Opportunity record as they have to their book.

1. In the Actions title bar on the Workflow Rule Detail page, click Menu, and then select the type of action that you want to be performed.

The trigger event on the workflow rule determines what types of actions can be created on the rule. Workflow rule actions for partner accounts are described in [Record Types for Which Oracle CRM On Demand for Partner Relationship Management Workflow Rule Actions Are Supported](#).

2. In the Key Action Details section of the Workflow Action Edit page, enter a name for the action. If you want to enable the action, then select the Active check box.
3. Save the action.
4. From the Actions Menu, select Sync Owner Partner.
5. Provide an appropriate name.
6. Select Active.
7. Click Save.

Viewing Workflow Results

You can use Oracle CRM On Demand to view the results of your workflows.

Requirements for Viewing the Results of Your Workflow

Before you can view the results of your workflow, you must have completed the tasks in the [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#).

- You must define a partner organization (Partner A) on the user record.
- You must create a book as a Partner Book, and define the partner as Partner A.
- For each record type, you must define a workflow rule and a workflow action for each Trigger Event and Action combination, and set both rule and action to Active.

Perform the following steps to view the results of your workflow.

To view workflow results

1. Select a record that the workflow will execute, and set up a partner relationship.

The following table shows the relationship attributes that you must define when adding Oracle CRM On Demand for Partner Relationship Management related record types to the shown record types.

| Record Type | Comments |
|--|--|
| Accounts when adding Account Partners | You must define the relationship by using the Relationship Type of PRM Covering Partner or PRM Covered Item. |
| Opportunity when adding Opportunity Partners | You must define the relationship by using the Relationship Type of PRM Covering Partner or PRM Covered Item. |
| Partner Programs when adding Program Memberships | When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts). |
| Funds when adding Fund Memberships | When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts). |
| Leads when adding Lead Partners | When you add the Partner in the related item, you must select the Active flag. (The Active flag may need to be added to your related item page layouts). |

| Record Type | Comments |
|-------------|----------|
|-------------|----------|

2. Save the relationship record that you selected in Step 1.
3. Save the record type.
4. View the Books related item on the record type.
5. Add the appropriate book defined for Partner A, as follows:
 - a. If Books are not a related item that is visible to you, then update the access profile so that Books are visible as a related item.

For more information on working with access profiles, see [Setting Up Access Profiles for Partner Roles](#) .

- b. Sign out of Oracle CRM On Demand.
- c. Sign in to Oracle CRM On Demand.
- d. Verify that the workflow produced the results you wanted.

5 Managing Partner Relationships

Managing Partner Relationships

This chapter provides examples of tasks and processes that channel managers and partner users perform to manage partner relationships. Your company can customize the tasks to meet its requirements. The chapter includes the following topics:

- *About Partner Account and Profiling Management*
- *Example Process of Creating Partner Accounts*
- *About Managing Partner Programs*
- *Defining a Partner Program (Channel Manager)*
- *About Lead Management*
- *Example Process of Managing Leads*
- *About Managing Deal Registration*
- *Example Process of Managing Deal Registration*
- *About Fund Management*
- *Managing Funds (Channel Managers)*
- *About Fund Request Management*
- *Managing Fund Requests (Partner Users)*
- *About Fund Request Claims Management*
- *Example Process of Managing Fund Request Claims*
- *About MDF Request Management*
- *Managing MDF Requests (Partner Users)*
- *About MDF Claims Management*
- *Example Process of Managing MDF Claims*
- *About Special Pricing Request Management*
- *Managing Special Pricing Requests (Partner Users)*
- *About Special Pricing Claims Management*
- *Example Process of Managing Special Pricing Claims*
- *About Applications*
- *Managing Applications (Channel Manager)*
- *About Partner Content Management*
- *Example Process of Managing Partner Content*
- *About Training and Certification Management*
- *Example Process of Managing a Course*

About Partner Account and Profiling Management

A *partner account* in partner relationship management is an account with the account type set to Partner, the Account Partner check box selected, and the Managed Partner flag set to Y. Partner accounts are records that track information about partners that have or will have users in Oracle CRM On Demand for Partner Relationship Management.

It is recommended that two separate records are created if the brand owner company works with another company both as a PRM partner and as an account to which the brand owner sells.


Working with partner records, you can define the business and the partnership profile information as well as the partnership information for the brand owner and the partner. Examples of partner profile information are company name, address, phone numbers, fax number, Web site, annual revenue, number of employees, market, industry, and a description of the business.

You can work with partner accounts through the Accounts tab or through the Partners tab, but some actions are possible in only one of the tabs. For more information about partner accounts, see [Guidelines for Working with Partner Accounts](#).

Guidelines for Working with Partner Accounts

When you are setting up and working with partner accounts, consider the following guidelines:

- **Partner accounts are a subclass of accounts.** Because the partner record type is a subclass of the account record type, custom fields added to the account record type also appear in the partner record type. However, the reverse is not true. Custom fields added to the partner record type are not available in the account record type.

 **Note:** When you edit a partner account from the Accounts tab, the Account Type field (set to Partner) is visible. When you edit a partner account from the Partners tab, the Account Type field is not visible, because the only account type that a partner account can have is Partner.

- **Create partner accounts using the Partner tab.** It is recommended that a PRM partner account is created and managed through the Partner tab.

You can create PRM partner accounts through the Accounts tab, or through the Partners tab. If you create the account through the Partners tab, then the account type is automatically set to Partner and the Managed Partner Flag is automatically set to Y. If you create an account through the Accounts tab and want to designate it as a partner account, then you must set the Account Type field to Partner and the Managed Partner Flag to Y if you want the record to be treated as a PRM partner account in the partner record type. Designating an account as a partner account results in the account being visible through the Partners tab.

- **Changing the account type of a partner is restricted.** You cannot change the account type of a partner account to anything other than Partner while the partner organization status on the partner account is set to Active.

To change the account type of a partner account, you must first set the partner organization status on the account to Inactive through the Partners tab. You can then change the account type value through the Accounts tab.

- **Deleting partner accounts with an active status is not allowed.** Oracle CRM On Demand does not allow you to delete an active partner account (that is, an account of the type Partner, where the partner organization status is set to Active) from the Accounts tab. This is because partner accounts can have opportunities and other records associated with them. Also, you cannot delete an account from the Partners tab, you can only make the partner account inactive.

To delete a partner account, you must first set the partner organization status on the account to Inactive through the Partner tab. You can then delete the account through the Accounts tab.

When you delete a partner account from the Accounts tab, Oracle CRM On Demand checks to make sure that the partner organization status on the account is set to Inactive, to prevent accidental deletion of an active partner record. For more information, see [Oracle CRM On Demand Online Help](#).

- **Defining a partner hierarchy is allowed.** You can indicate partner hierarchies, such as a company that is a subsidiary of another company, by defining a parent-child relationship between accounts. The user of the parent account allows a hierarchy to be defined. For more information about partners, see [Oracle CRM On Demand Online Help](#).

About Book Management

Using books to manage visibility to partner records ensures that one partner organization's critical information or records are secure from users in another partner organization unless one partner organization explicitly gives another access rights. Books also control visibility to records, so that all of the users who are associated with a partner organization's book have visibility to the partner organization record, and to all records that are linked to the partner organization's book. When a partner account is linked to another record, the linked record can also be associated with the partner organization's book.

Records can be associated with books either manually (by adding the book to the Book related information section on a record), or through workflow rules. For information about using workflow rules to associate books with records, see [Process of Configuring Books and Workflow Rules for Oracle CRM On Demand for Partner Relationship Management](#).

The record types that books can be associated with are as follows:

- Account
- Application
- Deal Registration
- MDF Requests
- SP Requests
- Partner
- Partner Program
- Opportunity
- Lead
- Fund

The following table describes some of the fields that are important when defining a book for a partner organization.

| Field | Description |
|------------------|---|
| Book Type | Used to define a partner organization's book. When you create partner organization books, you select the Partner Organization value, which is set up by the company administrator. |
| Partner | The partner organization associated with the book. |
| Partner Location | The Partner Location value is derived from the partner account record and is populated by default. The value is determined by the partner account relationship that is created when the Partner field is populated. |

| Field | Description |
|-------|-------------|
|-------|-------------|

Example Process of Creating Partner Accounts

This topic provides one example of a process for creating partner accounts. Your company may follow a different process according to its business requirements.

To create a partner account, channel managers perform the following tasks:

1. [Creating Partner Accounts \(Channel Managers\)](#)
2. [Creating Partner Organization Books \(Channel Managers\)](#)

Creating Partner Accounts (Channel Managers)


This task is a step in [Example Process of Creating Partner Accounts](#).

Complete the steps in the following procedure to create a partner account.

To create a partner account

1. Navigate to the Partners tab, and create a new partner account.
2. Set the status of the partner account to Active.
3. Save the partner account.

For more information about creating partner accounts, see [Oracle CRM On Demand Online Help](#).

 **Note:** Fields can be added to or removed from the Partner Detail page. If there are fields that you want to add to the Partner Detail page, then contact your PRM administrator to add the fields.

What Happens When a Partner Is Created and the Partner Organization Status Is Set to Active?

When a PRM partner is created, the partner organization status set to Active, and the record is saved, a partner book is automatically created. As users are added as members of this PRM partner organization, the following actions occur:

- The users are automatically added to the book that was created.
- A partner record is placed in this book when a partner relationship is defined for the partner and Partner Access or Reciprocal Access is selected.

You can access this book in the book related item for the partner.

Creating Partner Organization Books (Channel Managers)

This task is a step in [Example Process of Creating Partner Accounts](#).

Complete the steps in the following procedure to create a partner organization book.

To create a partner organization book

1. In Oracle CRM On Demand, click Admin.
2. In the User Management and Access Controls section of the Admin Homepage, click Book Management.
3. On the Book Hierarchy page, click New.
4. On the Book Edit page, enter the information for the book, including the fields shown in the following table, and then save your record.

The following table describes the settings for the fields on partner organization books.

| Field | Description |
|------------------|---|
| Book Name | It is recommended that you define a naming convention such as the following: Partner Book - Company A - Location. |
| Book Type | Choose the partner organization value from the picklist. |
| Partner | Click the lookup icon, and select the partner organization with which the partner book will be associated. |
| Can Contain Data | Select the check box. |

5. On the Book Details page, on the title bar of the Book Users section, click Add Users.
6. In the Book Users Edit page, choose the users whom you want to associate with the book.
These users have visibility to the partner account record and to the records linked to the partner account.
7. Select a book user role (optional) and a book access profile for each user.
For information about book user roles and book access profiles, see *Oracle CRM On Demand Online Help*.
8. Save the record.
For more information about books, see *Oracle CRM On Demand Online Help*.

About Managing Partner Programs

Partner programs are designed by the brand owner company to help manage the life cycle of partners, from recruiting and segmenting partners to supporting funding programs, and to encourage the registration of deals. A *partner program* describes the requirements and benefits for partners when they are members of the partner program. Partner program records allow you to manage different types and levels of partner programs and to administer partner program memberships. For more information about the fields on the Partner Program page, see *Oracle CRM On Demand Online Help*.

Defining a Partner Program (Channel Manager)

Complete the steps in the following procedure to define a partner program.

To define a partner program

1. Navigate to the Partner Programs tab, and create a new partner program.
2. Define the Partner Program name and status, and the other fields, as applicable.
3. Save the Partner Program record.
4. In the Partner Program Details page, scroll down to the Program Membership section, and click New to add a partner to the partner program.
5. In the Partner Name field, click the lookup icon, and choose the name of the partner that you want to add as a member of the partner program.
6. Complete the other fields on the Program Membership Detail page, as required.
7. Save the record.

About Lead Management

A brand owner can assign a lead or group of leads to a partner organization or to a specific partner user, such as a partner sales representative. The partner can then accept or reject the ownership of the lead. After the lead is accepted, the partner can follow the same lead management processes that are defined for an internal field sales representative. For more information, see *Oracle CRM On Demand Online Help*.

The following table describes the fields that support lead management in Oracle CRM On Demand for Partner Relationship Management.

| Field | Description |
|-----------------------------|---|
| Ownership Status | Defines the current ownership status of the lead. The values include: <ul style="list-style-type: none">• Transfer to Partner. The channel manager has transferred the lead to a partner.• Accepted. A partner selects Accepted to accept the lead.• Declined. A partner selects Declined to decline the lead. |
| Channel Manager | Read-only. This field contains the channel manager's name. The value is derived from the Channel Manager field on the partner record. |
| Owner Partner Account | Read-only. By default, this field displays the name of the partner company that the current owner of the lead works for. If the current owner is a brand-owner user, then this field is blank by default. |
| Principal Partner Account | The partner company that is currently responsible for the lead. Typically, this field is the same as the Owner Partner Account, but might sometimes be different, for example, when the owner has out-sourced the follow-up work. |
| Originating Partner Account | The name of the partner company that uncovered the lead. |

Example Process of Managing Leads

This topic provides one example of a process for managing leads. Your company may follow a different process according to its business requirements.

To manage leads, channel managers and partner users perform the following tasks:

1. [Creating Leads for Partners \(Channel Managers\)](#)
2. [Taking Ownership of a Lead \(Partner Users\)](#)

Creating Leads for Partners (Channel Managers)

This task is a step in [Example Process of Managing Leads](#).

Complete the steps in the following procedure to create a lead.

To create a lead for a partner

1. Navigate to the Lead tab, and create a new lead.
2. Enter the lead's name and complete the other fields.
3. In the Owner Full Name field, click the lookup icon, and choose the new owner from a list of partner users.
4. Set the ownership status to Transfer to Partner.

This status indicates that you have transferred this lead to the partner user.

5. Save the lead record.

When you save the record, the Owner Account field and the Channel Manager field are populated automatically from the partner account record associated with the new owner of the lead.

Taking Ownership of a Lead (Partner Users)

This task is a step in [Example Process of Managing Leads](#).

Complete the steps in the following procedure to take ownership of a lead.

To take ownership of a lead

1. Sign in to Oracle CRM On Demand, review the new lead in your list of leads, and determine whether you want to own the lead.
2. Accept or reject the lead, as follows:
 - o To accept the lead, set the ownership status to Accepted.
 - o To decline the lead, set the ownership status to Declined.
3. Save the record.
4. Follow the standard lead management process.

For more information, see [Oracle CRM On Demand Online Help](#).

About Managing Deal Registration

Deal registration is a process by which a partner user registers a business opportunity with the brand owner in order to become eligible for benefits, such as exclusive rights to the opportunity, additional rebates, presales support, and so on. Typically, a partner user requests registration for an opportunity that he or she discovered. However, it is also possible that the partner might register an opportunity that was previously offered by the brand owner. Oracle CRM On Demand supports both possibilities by enabling a partner user to register new as well as existing opportunities.

The following table describes the fields that support deal registration in Oracle CRM On Demand for Partner Relationship Management.

| Field | Description |
|----------------------------|--|
| Name | The name of the deal registration. |
| Type | The type of deal registration. |
| Submission Status | Indicates the current submission status of the registration. The possible values are Not Submitted, Submitted, and Recalled. |
| Expiration Date | The date after which the registration becomes invalid. |
| Special Price Reqd. | Indicates whether or not a special price might be required for one or more products. |
| ID | Unique identifier for the deal registration assigned by Oracle CRM On Demand. |
| Principal Partner | The partner company that is leading the effort for the registration. |
| Principal Partner Location | The location of the principal partner. |
| Partner Program | Partner Program in which the principal partner is enrolled. |
| Support Reqd. | Indicates whether or not any presales support is required for the deal. |
| Associated Opportunity | An existing opportunity for which the registration is being requested. |
| New Opportunity | Indicates whether or not the registration is for a new opportunity. |
| Currency | The type of currency on the deal. |
| Close Date | Date by which the deal is likely to close. |
| Product Interest | Broadly indicates the product area of the opportunity. |
| Next Step | The next logical step in the selling process of the deal. |

| Field | Description |
|---------------------|--|
| Associated Customer | The customer associated with the deal. The customer must be an existing customer. |
| New Customer | Indicates whether or not the customer on the registration is a new customer. |
| Company Name | Name of the customer company. |
| Country | The country where the customer company is located. |
| Address 1 | First line of street address of the customer company. |
| Address 2 | Second line of the street address of the customer company. |
| City | City where the customer company is located. |
| Postal Code | Postal code of the customer company address. |
| Associated Contact | Contact associated with the deal. The contact must be a contact already present in Oracle CRM On Demand. |
| New Contact | Indicates whether or not the contact is new to Oracle CRM On Demand. |
| Mr./Ms. | Salutation of the contact. |
| First Name | First name of the contact. |
| Middle Name | Middle name of the contact. |
| Last Name | Last name of the contact. |
| Job Title | Job title of the contact. |
| Email | Email address of the contact. |
| Telephone # | Telephone number of the contact. |
| Cell Phone | Mobile telephone number of the contact. |
| Fax | Fax number of the contact. |
| Approval Status | Indicates the current approval status for the deal registration. |
| Current Approver | Name of the approver who must approve the registration next. |
| Final Approver | Name of the person who granted final approval for the deal registration. |

| Field | Description |
|-----------------------------|--|
| Submitted Date | The date and time when the registration was most recently submitted for approval. |
| Approved Date | The date and time when the registration received final approval. |
| Reject Reason | Indicates why the registration was returned or rejected. |
| Owner | Current owner of the registration. |
| Owner Partner Account | The partner company associated with the current owner. If the current owner is a brand owner user, then this field is blank. |
| Originating Partner Account | Partner company that initially discovered or referred the deal. |

Example Process of Managing Deal Registration

This topic provides one example of a process for managing deal registration. Your company may follow a different process according to its business requirements.

To manage deal registration, channel managers and partner users perform the following tasks:

1. [Creating and Submitting Deal Registrations \(Partner Users\)](#)
2. [Associating Deal Registration with an Opportunity \(Channel Manager\)](#)
3. [Approving, Rejecting, or Returning Deal Registrations \(Channel Managers\)](#)

Creating and Submitting Deal Registrations (Partner Users)

This task is a step in [Example Process of Managing Deal Registration](#).

Complete the steps in the following procedure to create and submit a deal registration.

To create a deal registration

1. Navigate to the Deal Registrations page, and create a new deal registration.
2. Specify the details for the deal registration as follows:
 - a. Specify the name for the registration and other details, such as the expiration date and so on.
 - b. If the registration is for an existing opportunity, then fill out the Associated Opportunity field as appropriate. Otherwise, if the registration is for a new opportunity, then select the New Opportunity check box, and specify the additional details, such as Deal Size, Close Date, and so on.
 - c. If the registration is for an existing customer, then specify the Associated Customer field. If the deal is for a new customer, then select the New Customer check box, and specify the additional details about the new customer.
 - d. Perform the preceding three steps for Contact records as well.

- e. If you want to assign the ownership of the deal registration to a different user, then specify the user in the Owner field.
- f. Save the record.
3. If you know the likely products for the deal, then specify each product as a line item on the registration. Provide as much information as possible, including the price, quantity, and so on.

To submit a deal registration

1. Update the Submission Status field from Not Submitted to Submitted.
2. Save the record.

Associating Deal Registration with an Opportunity (Channel Manager)

When creating a new deal registration, it might or might not be associated with an opportunity. In most cases, the partner user has a new opportunity in mind when creating a deal registration and thus does not associate it with an existing opportunity. However, a deal registration cannot be approved unless it is associated with an opportunity. Thus, associating a deal registration with an opportunity is an important activity, usually performed by a brand owner user. The user can do it manually by populating the Associated Opportunity field or automatically by converting the deal registration to an opportunity.

This task is a step in [Example Process of Managing Deal Registration](#).

Complete the steps in the following procedure to associate a deal registration with an opportunity.

To manually associate a deal registration with an opportunity

1. Select a deal registration that has the appropriate approval status, for example, Pending Approval.
2. Populate the Associated Opportunity field with the appropriate opportunity.
3. Save the record.

To automatically associate a deal registration with an opportunity

1. Select a deal registration that has the appropriate approval status, for example, Pending Approval.

If your role has the privilege, PRM: Convert Deal Registration, then you see a button labeled, Convert to Opportunity, on the Deal Registration Details page.

2. Click Convert to Opportunity.

The Deal Registration Conversion page is displayed. Some fields are prepopulated with the values from the deal registration.

3. Modify the default values, as appropriate, and click Save.

If the conversion is successful, then a new opportunity is created and automatically associated with the deal registration. The Associated Opportunity field on the registration is populated with the newly created opportunity.

Approving, Rejecting, or Returning Deal Registrations (Channel Managers)

This task is a step in [Example Process of Managing Deal Registration](#).

Complete the steps in the following procedure to approve, reject, or return a deal registration.

To approve or reject a deal registration

1. Navigate to the deal registration home page. Drill down on the list named, Deal Registrations Waiting for My Approval.

A list of all deal registrations for which you are the current approver. appears.

2. Review the deal registrations in the list, and click the Edit link for the deal registration that you want to review and change.

As part of your review of the deal registration for approval, it is recommended that you determine whether the business opportunity specified on the deal registration already exists as an opportunity in Oracle CRM On Demand.

3. Determine whether a matching opportunity exists, then do one of the following:
 - o If a matching opportunity exists, then associate it with the deal registration by updating the Associated Opportunity field in Oracle CRM On Demand.
 - o If no matching opportunity exists, then convert the deal registration to an opportunity before giving it approval.

For more information on converting a deal registration to an opportunity, see [Associating Deal Registration with an Opportunity \(Channel Manager\)](#).

4. Determine what the approval status on the deal registration should be, and update the Approval Status field. The options are as follows:
 - o **Approved.** Use this status to indicate that the deal registration is approved, if you have the final approval authority.
 - o **Pending Approval.** Use this status to indicate that you approve the deal registration, but another person in the approval hierarchy must make the final approval.
 - o **Returned.** Use this status to return the deal registration to the partner user because additional information is needed. Optionally, you might also specify why you are returning the registration by typing the appropriate reason in the Reject Reason field.
 - o **Rejected.** Use this status to reject the deal registration. Specify the reason for rejection in the Reject Reason field.
5. If you set the approval status to Pending Approval in the Approver field, then choose the name of the brand owner user who must review this deal registration.

About Fund Management

The creation, approval, and administration of Market Development Funds (MDF) and Special Pricing Authorization (SPA) programs are supported using funds and fund request records. Funds and fund request records support financial information that can simplify the MDF and SPA management process, including information, such as fund establishment, fund

administration, and managing requests, approvals, and claims. Funds can be set up to support MDF or SPA processes by specifying an appropriate fund type.

Managing Funds (Channel Managers)

This topic provides one example of a procedure for managing funds. Your company may follow a different procedure according to its business requirements.

Complete the steps in the following procedure to manage a fund.

To manage a fund

1. Navigate to the Fund page, and create a new fund.
2. Complete the required fields.
3. In the Type field, choose a value. The options are as follows:
 - o MDF for a Market Development Fund
 - o SPA for a fund that supports Special Pricing Authorizations
4. Save the record.
5. In the Fund Detail page, navigate to Fund Partners, and add a new member to the fund. Fund members are partner accounts that have visibility to the fund.
6. Save the record.

For more information about managing funds, see *Oracle CRM On Demand Online Help* .

About Fund Request Management

Fund requests are used to support MDF requests and SPA requests. MDF requests can be made so that a partner can have access to market development funds. SPA requests are requests from partners for price adjustments that are submitted for approval. Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject each request. Within the fund request, the relationship to an opportunity can be defined, if applicable. This definition allows a brand owner to review and understand the opportunity that the fund request supports.

The following table describes the fields that support the fund request requirements for Oracle CRM On Demand for Partner Relationship Management.

| Field | Description |
|-------------|--|
| Fund | The fund associated with the fund request. |
| Type | Defines the type of request. The options are as follows: <ul style="list-style-type: none">• MDF (Market Development Fund)• SPA (Special Pricing Authorization) |
| Opportunity | The opportunity that the fund request is associated with. |

| Field | Description |
|---------------------|---|
| Opportunity Account | The account associated with the created opportunity. |
| Begin Date | The start date on which the preapproval is valid. |
| End Date | The date when the preapproval is no longer valid. |
| Owner Account | Read-only. The value is automatically populated after the record is saved. The field is populated with the record owner's partner organization as defined on the user record. |
| Channel Manager | Read only. This field is populated with the channel manager's name derived from the channel manager field on the partner record. |
| Approver | The next approver for fund requests. The next approver must be an employee of the brand owner company. |

Managing Fund Requests (Partner Users)

This topic provides one example of a procedure for managing fund requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a fund request.

To manage a fund request

1. Navigate to the Fund Request page, and create a new fund request.
2. Specify the details for the fund request, as follows:
 - a. Enter the Fund Request Name, and complete other required fields.
 - b. Select the fund to which the fund request is related.
 - c. Specify the type of fund (SPA or MDF).
 - d. Enter the requested amount in the Pre-Approval Req field.
 - e. If you want to assign ownership of the fund request to another user, then choose the appropriate partner user in the Owner field.
3. Save the record.
4. When you are ready to submit the request, change the value in the Status field to Pre-Approval Submitted, and save the record.

About Fund Request Claims Management

Using fund request claims, brand owners can automate the claims process. The claim can be submitted for the fund request that has been preapproved, allowing for a direct correlation between the resources that were requested and the payments made to the partner.

Example Process of Managing Fund Request Claims

This topic provides one example of a process for managing fund requests. Your company may follow a different process according to its business requirements.

To manage fund requests, channel managers and partner users perform the following tasks:

1. [Submitting Fund Request Claims \(Partner Users\)](#)
2. [Approving or Rejecting Fund Request Claims \(Channel Managers\)](#)

Submitting Fund Request Claims (Partner Users)

This task is a step in [Example Process of Managing Fund Request Claims](#).

Complete the steps in the following procedure to submit a fund request claim.

To submit a fund request claim

1. Navigate to the Fund Request page, and click the Edit link for the fund request for which you want to submit a claim.
2. Enter a value in the Claim Req field to indicate the amount of money you are requesting.
3. Set the value in the Status field to Claim Submitted.
4. Save the record.

Approving or Rejecting Fund Request Claims (Channel Managers)

This task is a step in [Example Process of Managing Fund Request Claims](#).

Complete the steps in the following procedure to approve or reject a fund request claim.

To approve or reject a fund request claim

1. Create a fund request list named, Claims Submitted for Approval, with the criterion defined as fund requests with the status of Claim Submitted.
2. Review the submitted claim.
3. Determine what amount, if any, to approve for the fund request, and edit the fund request as follows:
 - o If the fund request is approved, then do the following:
 - i. Enter the approved amount in the Amount Approved field.

- ii. Enter the date of the decision in the Claim Decision Date field.
- iii. Set the Status field to Claim Approved.
 - o. If the fund request is not approved, then set the Status field to Claim Denied.

4. Save the record.

After the fund request is approved, the fund management process continues. For more information, see *Oracle CRM On Demand Online Help*.

About MDF Request Management

MDF requests can be made so that a partner can have access to market development funds (MDF) and promote the brand owner's products in certain geographical areas or promote the brand. Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject an MDF request.

The following table describes the fields that support MDF requests for Oracle CRM On Demand for Partner Relationship Management.

| Field | Description |
|---------------------------|---|
| Request Name | The unique name of the MDF request. |
| Principal Partner Account | The partner company that is leading the effort on the MDF request. |
| Fund | The name of the fund associated with the MDF request. |
| Due Date | The date by which you must have the MDF request approved. |
| Expiration Date | The date on which the MDF request is no longer valid. |
| Start Date | The date and time the marketing activity starts. |
| End Date | The date and time the marketing activity ends. |
| Approver | The name of the current approver. |
| Approval Status | Indicates the current approval status of the MDF request. Status values are Pending Approval, Approved, Returned, Rejected, Expired, and Cancelled. |
| Owner | The name of the user who currently owns the MDF Request record. |
| Owner Partner Account | The partner account for which the owner works. |

Managing MDF Requests (Partner Users)

This topic provides one example of a procedure for managing MDF requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a MDF request.

To manage an MDF request

1. Navigate to the MDF Request page, and create an MDF request.
2. Specify the details for the MDF request, as follows:
 - a. Enter the request name, and complete the other required fields.
 - b. Select the MDF fund to which the request is related.
 - c. Enter the start and end dates and time for the marketing activity.
 - d. Enter the requested amount in the Pre-Approval Req field.
 - e. Provide additional details and the return on investment (ROI) justification for the event.
 - f. If you want to assign ownership of the MDF request to another user, then choose the appropriate partner user in the Owner field.
3. Save the record.
4. When you are ready to submit the request, change the value of the Submission Status field to Submitted, and save the record.

About MDF Claims Management

Using MDF claims, brand owners can automate the claims process. The claim can be submitted on the MDF request, regardless whether it has been preapproved or not. Preapprovals are optional for MDF claims.

Example Process of Managing MDF Claims

This topic provides one example of a process for managing MDF claims. Your company may follow a different process according to its business requirements.

To manage fund requests, channel managers and partner users perform the following tasks:

1. *Submitting MDF Claims (Partner Users)*
2. *Approving or Rejecting MDF Claims (Channel Managers)*

Submitting MDF Claims (Partner Users)

This task is a step in [Example Process of Managing MDF Claims](#).

Complete the steps in the following procedure to submit an MDF request claim.

To submit an MDF request claim

1. Navigate to the MDF Request page, and click the Edit link for the MDF request for which you want to submit a claim.
2. Enter a value in the Total Claim Amount Requested field to indicate the amount of money you are requesting.
3. Set the value in the Claim Status field to Claim Submitted.
4. Save the record.

Approving or Rejecting MDF Claims (Channel Managers)

This task is a step in [Example Process of Managing MDF Claims](#).

Complete the steps in the following procedure to approve or reject an MDF request claim.

To approve or reject an MDF request claim

1. Navigate to the MDF request list named, MDF Requests Pending My Approval.
2. Review the submitted claim with the claim status of Claim Submitted.
3. Determine what amount, if any, to approve for the MDF request, and edit the MDF request as follows:
 - o If the MDF request is approved, then do the following:
 - i. Enter the approved amount in the Total Claim Amount Approved field.
 - ii. Enter the date of the decision in the Claim Decision Date field.
 - iii. Set the Claim Status field to Claim Approved.
 - o If the MDF request is not approved, then set the Claim Status field to Claim Denied.
4. Save the record.

After the MDF request claim is approved, the fund management process continues. For more information, see [Oracle CRM On Demand Online Help](#).

About Special Pricing Request Management

Special pricing requests are requests for price adjustments that partners submit for approval. A partner user can add multiple products to the special pricing request and indicate the requested cost for each one of them. A partner user can provide additional information that justifies the requested discount.

Oracle CRM On Demand for Partner Relationship Management allows brand owners to approve or reject each request. Within the special pricing request, the relationship to an opportunity can be defined, if applicable. This definition allows a brand owner to review the opportunity for which the special pricing request has been created.

The following table shows the fields that support special pricing requests in Oracle CRM On Demand for Partner Relationship Management.

| Field | Description |
|--------------|---|
| Request Name | The unique name of the special pricing request. |

| Field | Description |
|---------------------------|--|
| Principal Partner Account | The partner company that is leading the effort on the special pricing request. |
| Fund | The name of the fund associated with the special pricing request. |
| Due Date | The date by which you must have the special pricing request approved. |
| Expiration Date | The date on which the special pricing request is no longer valid. |
| Deal Registration | The deal registration for which the request is related. |
| Partner Program | The partner program with which the special pricing request is associated. |
| Start Date | The date and time when the marketing activity starts. |
| End Date | The date and time when the marketing activity ends. |
| Approver | The name of the current approver. |
| Owner | The name of the user who currently owns the MDF Request record. |
| Owner Partner Account | This is the partner account for which the owner works. |

Managing Special Pricing Requests (Partner Users)

This topic provides one example of a procedure for managing special pricing requests. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage a special pricing request.

To manage a special pricing request

1. Navigate to the SP Requests page, and create a special pricing request.
2. Specify the details for the special pricing request, as follows:
 - a. Enter the request name, and complete other required fields.
 - b. Add the number of products to the special pricing request.
 - c. Enter the requested cost for each product in the Requested Cost field.
 - d. Provide additional information (competitive information, and so on) that would justify the price reduction.
 - e. If you want to assign ownership of the special pricing request to another user, then choose the appropriate partner user in the Owner field.
3. Save the record.
4. When you are ready to submit the request, change the value of the Submission Status field to Submitted, and save the record.

About Special Pricing Claims Management

Brand owners can automate the claims process, using special pricing claims. A claim can be submitted on the preapproved special pricing request. This type of claim allows for a direct correlation between the resources that were requested and the payments that were made to the partner.

Example Process of Managing Special Pricing Claims

This topic provides one example of a process for managing special pricing claims. Your company may follow a different process according to its business requirements.

To manage special pricing claims, channel managers and partner users perform the following tasks:

1. [Submitting Special Pricing Claims \(Partner Users\)](#)
2. [Approving or Rejecting Special Pricing Claims \(Channel Managers\)](#)

Submitting Special Pricing Claims (Partner Users)

This task is a step in [Example Process of Managing Special Pricing Claims](#).

Complete the steps in the following procedure to submit a special pricing request claim.

To submit a special pricing request claim

1. Navigate to the SP Request page, and click the Edit link for the special pricing request for which you want to submit a claim.
2. Enter a value in the Total Claim Amount Requested field to indicate the amount of money you are requesting.
3. Set the value in the Claim Status field to Claim Submitted.
4. Save the record.

Approving or Rejecting Special Pricing Claims (Channel Managers)

This task is a step in [Example Process of Managing Special Pricing Claims](#).

Complete the steps in the following procedure to approve or reject a special pricing request claim.

To approve or reject a special pricing request claim

1. Navigate to the special pricing request list named, Special Pricing Requests Pending My Approval.
2. Review the submitted claim with the claim status of Claim Submitted.
3. Determine what amount, if any, to approve for the special pricing request claim, and edit it as follows:
 - o If the special pricing request is approved, then do the following:
 - i. Enter the approved amount in the Total Claim Amount Approved field.

- ii. Enter the date of the decision in the Claim Decision Date field.
 - iii. Set the Claim Status field to Claim Approved.
 - o If the special pricing request is not approved, then set the Claim Status field to Claim Denied.
4. Save the record.

After the special pricing request claim is approved, the fund management process continues. For more information, see *Oracle CRM On Demand Online Help* .

About Applications

 **Note:** *Applications* is a record type in Oracle CRM On Demand for Partner Relationship Management.

You can use the Applications record type to manage partner applications.

The following table describes the fields that support Oracle CRM On Demand for Partner Relationship Management Application Requirements.

| Field | Description |
|---------------------------|--|
| Request Name | The unique name of the application. |
| Principal Partner Account | The partner company that is leading the effort on the application. |
| Fund | The name of the fund associated with the application. |
| Due Date | The date by which you must have the application approved. |
| Expiration Date | The date on which the application is no longer valid. |
| Start Date | Date and time the application starts. |
| End Date | Date and time the application ends. |
| Approver | The name of the current approver. |
| Approver status | Indicates the current approval status for the application. |
| Owner | The name of the user who currently owns the application. |
| Owner Partner Account | The partner account for which the owner works. |
| Channel Manager | Read-only. This field is populated with the channel manager's name, which is derived from the Channel Manager field on the partner record. |

Managing Applications (Channel Manager)

This topic provides one example of a procedure for managing applications. Your company may follow a different process according to its business requirements.

Complete the steps in the following procedure to manage applications.

To manage applications

1. Navigate to the Application page, and create a new list to show all applications where you are the channel manager and the status is Submitted.
2. Drill down on an application, and then do the following:
 - a. Verify that all appropriate information is filled out.
 - b. If appropriate, approve the application.

The application record is updated with a timestamp. For more information about managing applications, see *Oracle CRM On Demand Online Help*.

About Partner Content Management

Oracle CRM On Demand for Partner Relationship Management uses existing functionality to help brand owners do the following:

- Manage and deliver partner-specific content and collateral.
- Ensure that important materials are accessible only by the internal sales team.

Use the content management feature by selecting the Publish to PRM Users check box on the solution records. The brand owner can select this check box when adding or editing solutions. One of the following conditions applies:

- If this check box is selected for a solution, then partner users can see the solution when they sign in to Oracle CRM On Demand.
- If the check box is not selected, then the solution is not available to partner users.

The following table describes the solution field that supports content management for PRM.

| Check Box | Description |
|----------------------|---|
| Publish to PRM Users | Selecting this check box on a solution allows the solution to be viewed by partner users. |

CAUTION: It is important for brand owner users who are developing content to understand that if the Publish to PRM User check box is selected on a solution, then the solution and supporting material are visible to partner users.

Example Process of Managing Partner Content

This topic provides one example of a process for managing partner content. Your company may follow a different process according to its business requirements.

To manage partner content, channel managers and partner users perform the following tasks:

1. *Publishing Solutions for Partners (Channel Managers)*
2. *Reviewing Solutions (Partner Users)*

Publishing Solutions for Partners (Channel Managers)

This task is a step in *Example Process of Managing Partner Content*.

Complete the steps in the following procedure to publish solutions for partners.

To publish a solution for partner users

1. Navigate to the Solution page, and add a new solution record.
2. Enter the name of the solution, and complete other required fields.
3. Select the Publish to PRM Users check box.
4. Save the solution.

Reviewing Solutions (Partner Users)

This task is a step in *Example Process of Managing Partner Content*.

Complete the steps in the following procedure to review solutions.

To review solutions

- Navigate to the Solutions tab, where the you can access solutions that have been made available to partner users.

About Training and Certification Management

The Training and Certification functionality was introduced in Oracle CRM On Demand Release 18. The Training and Certification features help you to offer training courses to your partner employees and track their skills and competencies in selling, installing, and providing after-sales service of your product offerings. Additionally, because a partner company is made up of partner employees, you can also assess its competency by the number of certified employees on its payroll. Training and Certification is part of Oracle CRM On Demand for Partner Relationship Management. In other words, you have access to the Training and Certification functionality only if Oracle CRM On Demand for Partner Relationship Management is provisioned for your company.

The Training and Certification module in Oracle CRM On Demand for Partner Relationship Management consists of four major functional subareas:

- Courses
- Exams
- Certifications
- Accreditations

You can configure the page appearance, security and behavior for each of these record types to suit your business requirements.

About Courses

A **course** is a structured educational program that imparts a specific set of skills to an individual. Many companies, especially those that deal with complex products or services, require their partners and resellers to be adequately trained in and familiar with what they sell. Courses thus become a mechanism to disseminate knowledge and information about a company's offerings. Typically, courses focus on a specific product or product family. However, at times, they might also deal with generic concepts or principles.

In Oracle CRM On Demand, a course is defined as being associated with a specific product or a set of products. Likewise, a course can also be associated with a single product category, several product categories, or no product categories at all. Oracle CRM On Demand enables you to capture several basic attributes of a course. However, you also have the flexibility to define your own fields and relationships on the course record to better help you meet your business requirements.

Courses might be offered by the company itself, out-sourced to designated training service providers, or both. With Oracle CRM On Demand you can define the list of third-party vendors offering the course and publish the list to partners. After a course is published, partner employees can enroll contacts on the course.

About Exams

An **exam** measures the competency of a contact in a specific set of skills. Exams are usually the next logical step for a contact after completing a course. Typically, a course culminates in exams, and the contact is expected to register and appear for the exams upon completing the course. Many companies consider that a course has been successfully completed only if a minimum score has been achieved in the exams.

You can associate an exam with products, one or more product categories, or both. You can also associate an exam with one or more courses, so that the logical progression from courses to exams is accurately reflected. Because exams are usually administered and managed by authorized testing service providers rather than by the company itself, you can also define the list of such third-party vendors for each exam. Finally, Oracle CRM On Demand enables a partner employee to register for an exam any contact to whom the partner employee has visibility.

About Certifications

A **certification** is a proof of a contact's competency in a specific set of skills. While an exam measures a person's competency, a certification actually confirms that the person is adequately competent. Certifications are typically awarded after a person has passed exams. Therefore, certifications can be thought of as a logical progression after courses and exams.

Certifications usually have an expiration date associated with them. A person who holds a certificate can claim to be certified only for a defined period, after which he or she must be recertified. When a certification does have an expiration date, the reason is usually because the skill for which the certificate was awarded is expected to either evolve or become obsolete.

Unlike courses and exams that may or may not be associated with products, a certification is usually awarded for a specific product or set of products. Oracle CRM On Demand supports the association of a certificate with courses, exams, products, product categories, and solutions. None of these associations are mandatory. You can associate as many or as few of these with a certification as appropriate. You can even define a certification that is not associated with any course, exam, product, product category, or solution.

Certifications can be requested online through Oracle CRM On Demand. Any user with the appropriate access rights and privileges can request certification for any contact to whom the user has visibility.

About Accreditations

An **accreditation** is proof of a partner company's competence to deliver a service of acceptable quality. While certifications are for an individual, accreditations are for a company. A partner company is awarded an accreditation upon satisfying several requirements. Usually, one of the requirements is to have a pre-defined minimum number of employees with specific certifications on the payroll. Thus, in some ways, an accreditation can be thought of as a collection of certifications. It is the next step in the sequence of courses to exams to certifications.

Just as with the other three Training and Certification objects, accreditations can be associated with products, product categories, and solutions. Accreditations can also be related to each other. Oracle CRM On Demand also allows a user to request accreditation of the user's partner organization or of any partner company to which the user has visibility.

Example Process of Managing a Course

This topic provides an example of a typical process for managing a course. Your company may follow a different process according to its business requirements. This process is similar for accreditations, certifications, and exams.

To manage a course, perform the following tasks:

1. [Creating a Course](#)
2. [Associating a Course with Products, Product Categories, and Solutions](#)
3. [Defining Dependencies on Other Courses](#)
4. [Associating a Course with Exams and Certifications](#)
5. [Making a Course Visible to Partners](#)
6. [Enrolling in a Course](#)
7. [Updating the Course Enrollment Record](#)

Creating a Course

This task is a step in [Example Process of Managing a Course](#).

Only three fields are required when creating a course: the Name, Status, and Owner fields. You can make additional fields mandatory through configuration. Complete the following steps to create a course.

To create a course

1. Navigate to the Course page, and create a new course
2. Specify the details for the course as follows:
 - a. Type a name for the course.
The name must be unique and is case-sensitive.
 - b. Modify the status to an appropriate value, if necessary.
The default status is Draft.
 - c. Select the primary product only if you believe that this course is mainly targeted at a single product. If this course is appropriate for several products, then leave this field blank.
 - d. Select the primary product category only if you believe that this course is mainly targeted at a single product category. If this course is appropriate for several product categories, then leave this field blank.
 - e. Select the Available From and Available Till dates, if known.
These two dates determine the Recently Introduced Courses and Retiring Courses lists on the course home page.
 - f. Enter all the known details about the course, such as the duration, course fee, format, and so on.
 - g. In the Contact Information Section, specify the point-of-contact for the course. Do one of the following:
 - If the point-of-contact already exists as a contact in Oracle CRM On Demand, then use the Contact drop-down list.
 - If the point-of-contact is not defined in Oracle CRM On Demand, then enter the details using the text fields, such as First Name, Last Name, and so on.
 - h. The default value for the owner is your user name. If you want to make some other user the owner of the course, then specify that user name in the Owner field.
3. Save the course record.

Associating a Course with Products, Product Categories, and Solutions


This task is a step in [Example Process of Managing a Course](#).

You can associate a course with one or more products and product categories. If the course is appropriate for only one product or one product category, then use the Primary Product field or Primary Product Category field. If the course is applicable to more than one product or more than one product category, then perform the following task.

Complete the steps in the following procedure to associate a course with products, product categories, and solutions.

To associate a course with products, product categories, and solutions

1. In the Course Products, Course Product Category, or Course Solutions related item section, click Add.
2. On the edit page, specify the product, product category, or solution, and click Save.
3. Repeat Steps 1 and 2 of this procedure as many times as necessary to define all the relationships.

 **Note:** Perform the previous task to relate a course to solutions, regardless of whether the course is related to one solution or many solutions.

Defining Dependencies on Other Courses

This task is a step in [Example Process of Managing a Course](#).

A course is usually related to other courses as a prerequisite, follow-up, and so on. Oracle CRM On Demand enables you to define these relationships by performing the following task. However, these relationships are not enforced and exist only for informational purposes.

Complete the steps in the following procedure to define dependencies on other courses.

To define dependencies on other courses

1. In the Related Courses related item section, click Add.
2. In the Related Course edit page, specify the related course and the relationship.
3. Click Save.
4. Repeat Step 1 through Step 3 of this procedure as many times as necessary to define all the relationships.

 **Note:** The list of values in the Relationship field is configurable. You can add, modify, or remove items from the relationship list.

Associating a Course with Exams and Certifications

This task is a step in [Example Process of Managing a Course](#).

A course usually culminates in one or more exams. If the contacts pass the exam, then they are awarded certificates. You can associate a course with exams or certifications or both.

Complete the steps in the following procedure to associate a course with exams and certifications.

To associate a course with exams and certifications

1. In the Course Exams or Certification Courses related item section, click Add.
2. On the Edit page, specify the exam or certification, as appropriate.
3. Repeat Steps 1 and 2 of this procedure to add additional exam or certificate relationships.

Making a Course Visible to Partners


This task is a step in [Example Process of Managing a Course](#).

A course does not automatically become visible to partners. You can make the course visible by adding partner employees to a team, and associating that team with the course record.

Complete the steps in the following procedure to make a course visible to partners.

To make a course visible to partners

1. In the Course Team related item section, click Add.
2. On the Edit page, specify the user name, team role, and record access.

 **Note:** It is recommended that you grant read-only access to the team member employees of the partner.

3. Click Save

Enrolling in a Course

This task is a step in [Example Process of Managing a Course](#).

Oracle CRM On Demand enables a partner user to enroll in any course that is visible to him or her.

Complete the steps in the following procedure to enroll in a course.

To enroll in a course


1. In the Course Enrollment related item section, click Enroll.

The course name is automatically populated. However, you can modify it, using any valid course.


2. In the Candidate field, specify a contact.

You can specify any contact to whom you have visibility.

3. If this enrollment is part of a broader business objective, then you can specify the objective as well.
4. Complete the other fields, such as Enrollment Date, Completion Date, and so on.

 **Note:** The Enrollment Status field is read-only for the Partner Sales Representative role.

5. If you are enrolling in a course that is offered by a third-party vendor and not by the company itself, then specify the vendor name in the Course Partner field, assuming the vendor is defined as a partner in Oracle CRM On Demand and is visible.
6. Specify the other fields, as appropriate.
7. Click Save.

 **Note:** Sometimes, an individual might repeat a course. Therefore, Oracle CRM On Demand supports multiple enrollments for the same individual so long as the enrollment date is different. An individual cannot enroll in the same course with the same enrollment date and the same owner more than once. Additionally, the course enrollment record also provides you with the flexibility of adding custom fields.

Updating the Course Enrollment Record


This task is a step in [Example Process of Managing a Course](#).

The course enrollment record can be updated by users with the appropriate access rights. Only brand-owner roles, such as channel manager, can update the Status field on the enrollment record. All other fields can be updated by partner roles as well. You can modify this behavior by updating the appropriate page layouts.

Complete the steps in the following procedure to update an enrollment record.

To update an enrollment record

1. On the Course Enrollment related item section, click the Edit link for the enrollment record that you want to modify.
2. On the Course Enrollment Edit page, modify the fields as appropriate.
3. Click Save.

 **Note:** The default permissible values for the Enrollment Status field are Enrolled, Completed, and Incomplete. However, your company administrator can modify this list to suit your business requirements.

