

Oracle Fusion Cloud Sales Automation

**Using Partner Relationship
Management for Partners**



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

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For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

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Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide contains information to help partner administrators and partner salespeople perform day-to-day business tasks using the partner relationship management functionality.

This guide describes how partners can manage:

- Their account and partner users
- Leads
- Deal registration
- Opportunities
- MDF requests and MDF claims
- Partner program enrollments
- Assets
- Service requests
- Activities

Related Guides

Refer to the following related guides to understand more about the functionality covered in this guide.

The following table provides a list of related guides that can help you use partner relationship management features and functionality.

Title	Description
Getting Started with Your Sales Implementation	Describes how to set up sales automation capabilities by using a case study to describe concepts and procedures.
Using Sales	Describes the tasks that you perform to use your sales applications.
Configuring Applications Using Application Composer	Describes how to use Application Composer to modify and configure your applications.

Related Topics

- [Oracle Help Center](#)

2 Manage Your Partner Account and Partner Users

Changes to Personal Information

When partners are in Prospective status, they have limited access to the channel organization's applications. Prospective partners can do the following:

- Access their personal profile.
- View and edit their profile information, such as email address, password, and some personal preferences.

What Prospective Partners Can Do

Prospective partners can view and edit their personal information, view and edit their opt-in setting, reset or change their password and change their security questions and answers. They can update personal information like name, title, country, and so on.

Manage User Information

Partner administrators can manage user information for their partner account and partner users in the channel organization's applications.

Use these steps to manage user information:

1. Sign in with your Partner Administrator credentials.
2. Click **Partners**, and on your Company Profile page, click **Edit**.
3. Click the Partner Contacts tab, and search for and select the partner contact.
4. Edit the information for the partner contact.
5. Click the **Manage User Details** link if you want to edit the partner contact's role or manager, or if you want to deactivate the partner contact's user account. Click **OK**.
6. (Optional) To mark the partner record as a favorite, click the **Add to Favorites** icon.
7. Click **Save and Close**.

Announcements

Your channel sales team can send announcements that appear on your home page. These announcements communicate important information that the channel sales team want partner users to know.

As a partner, you can see the following:

- Active announcements left by your channel organization that are applicable to your partner company. These announcements appear in the left panel of your home page.
- Page controls at the bottom of the announcements panel, if your channel sales team have more than one active announcement. You can click these page controls to see the other announcements.

As a partner, you won't see the following:

- Announcements that aren't active.
- The Announcements panel if there are no active announcements.
- Announcements that aren't applicable to you. (Gold partners only see Gold announcements).
- Announcements specifically defined for internal employees of your channel organization.

Create a Partner Saved Search

Channel managers and partners can create a saved search based on the current user for the Partner business object. They can use this saved search to search for partner records that they created or updated.

Create a Saved Search for the Current User

To create a saved search for the partner business object based on the current user:

1. Sign in with your channel manager or partner credentials.
2. Click **Partner Management** and **Partners**.
3. On the Partners page, click **Show Advanced Search**.
4. Click **Add**, and select **Created By** or **Last Updated By**.
5. In the Created By or Last Updated By search field, select **Current User**.
6. Click **Save**.
7. In the Create Saved Search dialog box, type a name for the new saved search, for example, Partners I Created or Partners I Last Updated.
8. (Optional) Select the **Set as Default** check box to make this search the one that loads when a user first displays the page.
9. (Optional) Select the **Run Automatically** check box to run the search automatically when this search is loaded.
10. Click **OK** to save your search.

Create a Saved Search for the Site or for a Specific Role

To create a current user saved search with Page Composer for your entire site or for a specific job role:

1. Sign in with your channel manager or partner credentials.
2. Ensure that you're in a sandbox.
3. From the Settings and Actions menu, click **Edit Pages**.
4. Either select the option to edit pages at the **Site** level or select the option to edit pages at the **Role** level, choose the specific job role, and click **OK**.
5. Click **Partner Management** and **Partners**.

6. On the Partners page, click **Show Advanced Search**.
7. Click **Add**, and select **Created By** or **Last Updated By**.
8. In the **Created By** or **Last Updated By** search field, select **Current User**.
9. Click **Save**.
10. In the Create Saved Search dialog box, type a name for the new saved search, for example, Partners I Created or Partners I Last Updated.
11. (Optional) Select the **Set as Default** check box to make this search the one that loads when a user first displays the page.
12. (Optional) Select the **Run Automatically** check box to run the search automatically when this search is loaded.
13. Click **OK**.
14. To close Page Composer, click **Close**.
15. Test your new saved search.
16. Publish your sandbox to make the saved search available.

Saved Search in Workspace

Workspace is a single, unified work area that improves searches and makes key information available, thus accelerating user productivity. If enabled, then you do all your work in Workspace, instead of in individual work areas. To learn more about saved searches in Workspace, refer to the topics in the Related Topics section.

Related Topics

3 Manage Your Leads

Manage Leads

Partner sales representatives can access the channel organization's applications to view and manage leads assigned to them, and to create and manage new leads for the channel organization.

Accept or Reject Existing Leads

As a partner sales representative, you can follow these steps to accept or reject leads assigned to you by the channel sales team:

1. Sign in with your partner sales representative credentials and click **Leads**.
2. From your list of open leads, select the lead or leads you want to accept or reject.
3. If you are accepting the lead, you can click **Accept** or from the Actions list, choose the action you want to take on the leads you selected.
4. Click **OK**.

Note: If you choose to reject a lead, you can provide a reason and details about why you rejected it. You provide this information so the channel account manager can more accurately assign you leads in the future.

Create New Leads

As a partner sales representative, you can follow these steps to create new leads with your channel organization:

1. Sign in with your partner sales representative credentials and click **Leads**.
2. From your Leads list page, click **Create Lead**.
3. On the Create Lead page, provide the necessary lead details.
4. Click **OK**.

Accept or Reject Leads

If actionable email is enabled, when channel organizations assign you a lead, you receive an email notification about the lead. You can accept or reject the lead by selecting the appropriate action directly from the email notification.

You only see email notifications for leads you haven't already accepted. You can also select to review the lead before deciding to accept or reject it. When you select Review, the Lead Overview page opens, showing details about the lead. You can accept or reject the lead from the Lead Overview page as well.

Accepting or rejecting a lead from an email notification is the same as accepting or rejecting it from the Leads pages, except you do not provide a reject reason when rejecting a lead from email. The lead is handled in the same way as any other lead. By default, the actions you can select are:

- Review, opens the Overview page for the lead.
- Accept, sends a reply email indicating that you accepted the lead.

- Reject, sends a reply email indicating that you rejected the lead.

Convert Leads to Deal Registrations

Partner users who own the lead or are on the lead team can use the Deal Registrations subtab on the Leads pages to convert a lead into a deal registration.

When a partner registers the lead as a new deal, the lead details such as the Account, Contact, Owner, and Deal Size information copy over to the deal registration.

The mapping of the Lead to Deal Registration fields can be modified, however the following information appears on the deal registration by default:

- If the lead doesn't have an owner, the partner user who registers the deal becomes the owner. All of the partner members on the lead team are copied to the Deal registration team with the same access they had on the Lead team, with the exception of the Owner, who has Full access.
- If the lead already has a partner, then that partner is also added to the deal.
- If the lead does not have a partner, then the partner company that the partner user who registers the new deal works for becomes the partner for the deal.
- The Channel Manager field on the deal registration shows the internal resource who owns the partner account.
- If a partner program is involved in the lead, the program is copied over from the Lead Partner Program field.
- If the lead contains product information, that information is copied over to the deal.
- The deal registration status is set to Draft.
- The name of the associated lead appears in the Lead field on the Edit Deal Registration page. The partner can click the lead name to open the Lead Summary page.

Note: Partner users can remove the lead to deal association by clicking the Remove icon next to each deal listed on the Deal Registrations subtab. When a partner clicks Remove, only the association between the lead and the deal is removed. Clicking Remove does not remove the deal itself.

Convert a Lead to a Deal Registration

Partner users can follow these steps to convert a lead to a deal registration.

1. Sign in with your Partner Sales Representative, Partner Sales Manager, or Partner Administrator credentials.
2. From your springboard, click **Sales**, then click **Leads**.
3. From your list of leads, search for and select the lead you want to convert to a deal registration.
4. On the Edit Lead page, click the **Deal Registrations** subtab.
5. Click **Register New Deal**.

Convert Leads to Opportunities

Partner users who own the lead or are on the lead team can convert a lead into an opportunity by selecting the lead, and clicking Convert from the Actions menu.

Note: This capability is available to partner users only if implemented by an administrator.

Use these steps to convert a partner lead into an opportunity.

1. Sign in with your partner user credentials.
2. From the Sales work area, click **Leads**.
3. Search for and select the lead you want to convert.
4. From the Actions menu, select **Convert**.
5. On the Convert Lead to Opportunity page, ensure the lead shows the correct opportunity name, owner, primary contact, and account.
6. Click **Submit**.

4 Manage Your Deal Registrations

Overview of Deal Registrations

Deal registration is the process partners use to request exclusive rights to a deal from their channel organization.

This process provides partners with the means to inform the channel organization about a deal, and by being first to register that deal, the partners receive priority for the opportunity if their deal registration is approved. Deal registrations are less speculative than leads, but more speculative than opportunities.

Channel managers can use the Deal Registration pages to more easily manage their deal registrations and partners can register deals with their access to the channel organizations applications.

Partners can register deals and these submitted deal registrations are routed to channel sales managers for approval. In turn, channel sales managers can reject or return deal registration requests to partners, asking for additional information and justification. Before approving the deal, the channel sales managers can check for duplicate opportunities to avoid channel conflicts. Once a deal registration is approved, an opportunity is automatically created to track it in the pipeline. Channel managers can decide when to add a partner opportunity in the forecast. If a deal registration is approved or rejected by mistake, users with administrator rights can revert the status of the deal registration from Approved or Rejected to Pending Approval by resubmitting it.

If any account or contact associated with the deal registration is purged, then the reference to the account or contact is removed and the attribute is blanked out. In such cases, you can select new accounts or contacts only if the deal registration is editable.

Partner users and channel managers can also mark their favorite deal registrations using the **Add to Favorites** icon on the Edit Deal Registration page. For more information, see "Overview of Favorites" in the Implementing Sales guide.

This topic covers the following:

- Deal Registration Process
- Deal Registration Benefits
- Deal Registration Roles and Associated Actions

Deal Registration Process

A partner can create or accept a lead, then convert the lead into a deal registration. Partners can also create a deal registration directly (without starting with a lead). The deal registration goes through an approval process with the channel team. Once the channel team approves the deal registration, the partner gets priority for the deal and has a set period of time (on a case-by-case basis) to close the sale. During this time other channel members, or even the channel organization's own sales team, aren't allowed to work the deal. If the time period expires before the partner can close the sale, the channel team can give the opportunity to another partner or to its internal sales team.

Deal Registration Benefits

Deal registration lowers the chance of channel conflict, which is a situation where channel partners compete against one another, or compete against the channel organization's internal sales department. With deal registration, partners can work with a client without having to worry about another company trying to offer the same product at a lower price. Some brand owners and channel organizations also offer to help partners in the selling cycle, and deal registration lowers the chance of the channel organization taking the lead once the partner has brought them into the discussion.

Even with deal registration in place, a channel organization may occasionally give a lead to another partner or to its internal sales team, such as when the lead requests another partner.

Deal Registration Roles and Associated Actions

It's helpful to know which job roles are responsible for what actions in the deal registration life cycle. When both internal and external resources are added to the equation, this knowledge becomes even more crucial.

The following table shows the job roles and the deal registration actions allowed, including the specific actions permitted for the partner job roles and the specific actions permitted for the channel job roles.

Roles	Actions
Partner Sales Representative, Partner Sales Manager, and Partner Administrator	Create a deal registration and submit it for approval.
Partner Sales Representative, Partner Sales Manager, and Partner Administrator	If you're the submitter of the deal registration, you can withdraw the deal registration if it's still in pending approval status.
Partner Sales Representative and Partner Sales Manager	Edit a deal registration if they're on the team with full or edit access and the deal registration is in draft, return or withdrawn status. The partner attributes on the deal registration become those of the company the partner user belongs to and these attributes can't be changed by the partner user. However, a channel account manager or channel sales manager can pick or change the partner company when they're creating or editing a deal registration.
Partner Sales Representative and Partner Sales Manager	View deal registration product details if they're a resource on the deal team and they have view, edit, or full access.
Partner Sales Representative and Partner Sales Manager	Edit, add, or remove deal registration product details if they're a resource on the deal team with edit or full access, and the deal registration is in Draft, Returned or Withdrawn status.
Partner Sales Representative and Partner Sales Manager	View deal registration team details if they're a resource on the deal team and they have view, edit, or full access.
Partner Sales Representative and, Partner Sales Manager	Edit deal registration team members if they're a resource on the deal team with edit or full access.
Partner Sales Representative and Partner Sales Manager	Edit, add, or remove deal registration team members if they're a resource on the deal team and they have full access. Partner users can only add resources that belong to their own partner company.
Partner Administrator	View or edit all deal registrations belonging to the partner company the administrator works for. Partner Administrators can also view or edit the Team tab and products section. Partner administrators can also revert the status of an approved or rejected deal registration to Pending Approval by resubmitting it to allow correction of any submissions made in error.
Partner Sales Representative, Partner Sales Manager and Partner administrators	Add or modify notes, activities and add team members to the deal team regardless of the status the deal registration is in.
Channel Sales Manager and Channel Account Manager	Have all the functional privileges as the Partner Sales Representative and Partner Sales Manager. They can also approve, return, or reject a deal registration if they're a designated approver for the deal

Roles	Actions
	registration. They can do a duplicate check on the deal registration, they can convert a deal registration to an opportunity, and they can access the social tab.
Sales Administrator and Channel Operations Manager	<p>Have all the privileges as the Channel Sales Manager, but they have access to all deal registrations in the enterprise. Their update and manage capabilities are restricted based on the deal registration status, however, they can see all deal registrations even if they're not on the sales team or territory.</p> <p>Sales administrators and Channel Operations Managers can also revert the status of an approved or rejected deal registration to Pending Approval by resubmitting it to allow correction of any submissions made in error.</p>
All roles	Mark a deal registration as their favorite.

Deal Registration Management

Partners can manage their deal registrations in the channel organization's applications.

This topic discusses the following:

- Deal Registration Landing Page and List Views
- Creating and Submitting a Deal Registration for Approval
- Editing a Deal Registration
- Withdrawing (Recalling) and Resubmitting a Deal Registration
- Resubmitting an Approved or Rejected Deal Registration
- Deal Registration Approval Information and Approval History Region
- Deal Registration Expiration

Deal Registration Landing Page and List Views

Partners have direct access to their deal registrations and to access the most relevant deal registrations through the use of predefined lists, so they don't have to search for a deal registration each time they sign in.

Partners access the Deal Registrations page by clicking the Deal Registrations icon on their desktop. All partners see the same preconfigured sort for all Deal Registration lists - Submitted Date descending (oldest to newest submissions). Partners also see the same preconfigured Deal Registrations table column layout and the same preconfigured saved search run on the Deal Registrations page. Partners can use the advanced search capabilities to search for the following attributes:

- Registration Number
- Account Name
- Contact Name
- Contact Email
- Contact Phone

- (Deal Registration) Name
- Deal Expiration Date
- Channel Manager
- City
- State
- Postal Code for Account
- Deal Size
- Estimated Close Opportunity Name

Partners can filter their list of deal registrations using the following:

- My Open Deal Registrations: all deal registrations in Returned, Pending Approval, Draft, or Withdrawn status where the partner is the Owner.
- My Approved Deal Registrations: all deal registrations in Approved status where the partner is the deal registration owner.
- My Rejected Deal Registrations: all deal registrations in Rejected status where the partner is the deal registration owner.
- Deal Registrations Expiring Soon: all approved deal registrations that will expire within the selected day range where the partner is the deal registration owner.

Create and Submit a Deal Registration for Approval

Partners can create and submit a deal registration for a deal that they're working on so they can get exclusive access to pursue the deal and any special promotions offered by the channel organization for registering the deal. To create a deal registration, partners select the Create Deal Registration action on their Deal Registrations page.

When a partner selects the Create Deal Registration action on the Deal Registrations page:

- The deal registration status becomes Draft.
- The deal registration type becomes New.
- The partner becomes the Partner Owner for the deal registration.
- The partner account becomes the company that the partner represents.
- The channel manager becomes the channel manager who owns the partner account.

Note: Partners must save their deal registration before they submit it for approval.

When a partner selects the Submit for Approval action on the Deal Registration Profile page:

- The partner sees a confirmation message that the approval request has been sent to the channel company for approval.
- The deal registration request status changes to Pending Approval.
- The deal registration Summary page becomes read-only.
- The submission date becomes the current date and time.
- The deal registration approval workflow is triggered.

- An email notification for approval is sent to the appropriate approver or approvers.

After a partner has submitted a deal registration for approval, the partner can do the following:

- Create notes or activities for the deal registration.
- Add team members to the deal registration team.
- Withdraw the deal registration if it's still in Pending approval status.

Partner users who are able to create deal registrations can use the Copy action on the Edit Deal Registration page to use an existing deal registration as a template when creating a new deal registration. If you have Read Only access to the deal registration, you can't use the Copy action. Your sales administrator must first use Application Composer to expose the Copy action on the Edit Deal Registration pages before you can see it.

When you copy a deal registration:

- You can copy all exposed standard attributes, including all header attributes, Product table information, and Deal Team members.
- You can copy all custom attributes of the object that's being copied.
- The status of the new copied deal registration is Draft.
- You become the Owner of the new deal registration.
- You can copy only the Deal Team Members that you have security access to.

The following objects aren't copied:

- Attachments
- Activities
- Notes
- Territories
- Approval history
- Custom child objects

Note: The Copy action doesn't appear for SOAP and REST Web Services.

To use the Copy action:

1. Sign in with your partner user credentials.
2. Navigate to your deal registrations.
3. Search for and select the deal registration that you want to use as a template for your new deal registration.
4. From the Actions menu, click **Copy**.
5. In the confirmation message dialog box, click **Yes**.

The Edit Deal Registration summary page appears with a new deal registration number.

6. You can make further edits to the copied deal registration before saving it.

Edit a Deal Registration

Partners can edit a deal registration that has been returned or rejected by the channel manager. The following table shows what actions partners can take on the Summary page when a deal registration is in each possible status.

Deal Registration Status	Partner Actions	Summary Page/Field Behavior
Draft	Submit for Approval	<p>Editable.</p> <p>Approval information region isn't displayed.</p> <p>Approval History region isn't displayed.</p>
Pending Approval	Withdraw	<p>Read Only (Summary Tab).</p> <p>Approval Information region displays the following fields: Submitted By and Submitted Date.</p> <p>Approval History region is displayed.</p>
Returned	Submit for Approval or Withdraw	<p>Editable.</p> <p>Approval Information region is displayed with the following fields: Submitted by, Submitted Date, Returned by, Returned Date, Returned Reason, Returned Comments.</p> <p>Approval History region is displayed.</p>
Rejected	No Action	<p>Read Only (Summary Tab).</p> <p>Approval Information region is displayed with the following fields: Submitted by, Submitted Date, Rejected by, Rejected Date, Rejected Reason, Rejected Comments.</p> <p>Approval History region is displayed.</p>
Approved	No Action	<p>Read Only (Summary Tab).</p> <p>Approval Information region displays the following fields: Submitted By and Submitted Date.</p> <p>Approval History region is displayed.</p>
Withdrawn	Submit for Approval	<p>Editable.</p> <p>Approval Information region is displayed with the following fields: Submitted by, Submitted Date, Withdrawn By, Withdrawn Date.</p> <p>Approval History region is displayed.</p>
Expired	No Action	<p>Read Only (all tabs).</p> <p>Approval Information region is displayed with the following fields: Submitted by, Submitted Date, Approved by, Approved Date.</p> <p>Approval History region is displayed.</p>

Withdraw (Recall) and Resubmit a Deal Registration

Partners can withdraw a deal registration submission if they have submitted the Deal registration in error or to supply additional information. After partners withdraw a deal registration, they can continue to update it and resubmit the deal registration for approval.

The deal registration approver can return a deal registration to the partner owner if the approver requires additional information. In such cases, the approver must specify a reason for the return. If the deal registration is in Returned or Withdrawn status, the partner can edit it and resubmit the deal registration for approval.

Resubmit an Approved or Rejected Deal Registration

Users with administrator rights can revert the status of a deal registration from Approved or Rejected to Pending Approval by resubmitting it. If a deal registration has been rejected or approved by mistake, administrators can resubmit the deal. When resubmitted, the approval process re-initiates and the deal is assigned to the first approver or approvers who can take any approval action. An approved or rejected deal can be reverted multiple times. All re-submissions can be tracked on the Approvals subtab of the Edit Deal Registration page.

Deal Registration Approval Information and Approval History Region

On the Approvals subtab of the Edit Deal Registration page, channel managers can view the approval information and the approval history for a submitted deal registration, so they can see who approved or rejected the deal registration and at what stage in the approval workflow. The approval history information can also be exposed to partners. Approval history provides real-time visibility of the complete approval flow, from submission to final approval action.

When a deal registration is in Rejected, Pending Approval, Approved, Returned, or Expired status, partners can see the following information:

- Submitted By: The name of the user who submitted the deal registration.
- Submitted Date: The date on which the deal registration was submitted.
- Approved/Rejected/Returned by: The name of user who performed the Approve, Reject, or Return action.
- Approved/Rejected/Returned Date: The date on which the Approve, Reject, or Return action was performed and registration status changed.
- Rejected/Returned Reason: The reason codes selected for the Reject or Return action.
- Rejected/Returned Comments: The comments entered during the Reject or Return action.

After a deal registration has been submitted, partners can track the deal registration's approval history, including:

- Stage: the workflow description
- Date: the date the event occurred
- Approver: the user or users who are assigned the approval task in the workflow
- Status: the status of the deal registration at this stage in workflow.

Deal Registration Expiration

When a deal registration submitted by a partner or submitted on behalf of a partner is approved, the partner has a set number of days during which the deal registration benefits are valid. The Expiration Date field on the deal registration shows partners how long they have to close the sale. The preconfigured value is 90 days after the approval date. However, channel account managers can change this value.

If a partner's deal registration comes within a preconfigured day number of expiring, the partner owner receives a notification that the deal registration expires soon. The preconfigured value is 30 days. Partners can't request an extension before they receive this notification.

The partner receives a notification that the deal has expired. Partners can't reopen or resubmit an expired deal registration. Instead, partners must create a new deal registration.

Browse the Sales Catalog from Deal Registration Pages

The Sales Catalog provides comprehensive catalog navigation guidance and product/group information so that users can make informed decisions about which product group to select or which product to sell.

Channel users and partners can browse the sales catalog and view the product hierarchy directly from the Deal Registration pages. This feature must be enabled by your sales administrator before channel and partner users can access it.

Note: The Browse Catalog feature is only available for deal registrations that are in Draft status.

Use these steps to browse the sales catalog from Edit Deal Registration pages.

1. Sign in with your channel manager or partner credentials.
2. Click **Sales** and click **Deal Registrations**.
3. On the Deal Registrations page, select the appropriate deal registration in Draft status.
4. In the Products region of the Edit Deal Registration Summary page, click **Browse Catalog**.
5. On the Browse Sales Catalog page, you can click **Settings** and select to filter the catalog by territory.
6. If you have multiple catalogs, you can select the catalog you want to browse in the Browse region.
7. In the Catalogs region, you can click the name of the catalog to expand the catalog and browse its contents.

The Browse Sales catalog page updates to show the Product Groups and Products in the selected catalog.

8. In the Select column of the Product Groups and Products region, you can click the **Select** icon to add that product group or product to the deal registration
9. After you have selected all of the product groups or products you want to add to the deal registration, click **Done**.

You return to the Edit Deal Registration Summary page, where you can see that the selected product groups or products you selected in the catalog are now listed in the Deal Registration products region.

10. You can click **Save and Close** if you're done editing the deal registration or you can click **Save** to save the product groups or products you added and continue making edits to the deal registration, such as adding team members, activities or notes.

5 Manage Your Opportunities

Overview of Managing Opportunities

Partner salespeople can use the channel organization's applications to view and manage opportunities assigned to them and to create and manage new opportunities for the channel organization. The channel organization can control the visibility of the Opportunities icon for partners.

This control is useful when the supplier company requires that partners go through a registration process.

In the My Open Opportunities list, partner salespeople can review the opportunities they created and the opportunities where their channel account manager listed them as the opportunity owner. In the Open opportunities where I am on the team list, partner salespeople can review opportunities where their channel account manager has added them as a member of the opportunity team.

Create New Opportunities

Partner salesperson can follow these steps to create new opportunities with their channel organization.

1. Sign in with your partner sales representative credentials and click **Opportunities**.
2. From your Opportunities list page, click **Create Opportunity**.
3. On the Create Opportunity page, provide all of the necessary account, contact, and product details for the opportunity.
4. Click **OK**.

6 Manage Your MDF Requests and MDF Claims

MDF Request and MDF Claim Approval

Partners, channel account managers, and other designated marketing development fund (MDF) approvers can view the approval history of MDF claims and MDF requests that they have visibility into, so they can track who took an action, when and why the action was taken.

Users can view MDF request and MDF claim approval history either in a region on the Edit page, or in a separate subtab on the Edit MDF Request and Edit MDF Claim pages.

By default, approval history is available in a region of the Edit MDF Request and Edit MDF Claim pages. However, sales administrators can expose the Approval History subtab on these Edit pages instead.

View Approval History Information

The following table lists the information available on the Approval History region or subtab.

Type of Information Shown	Details
Current Assignee	<p>Assignee information includes both the current and future assignees.</p> <p>If the MDF request or MDF claim is assigned to one or more users, then the full person name for each assignee is shown, including the date and time.</p> <p>If the MDF request or MDF claim is assigned to one or more approval groups, then each user in the group is displayed.</p> <p>If the MDF request or MDF claim is assigned to one or more job roles, then the role name for each role is displayed separately, including the date and time.</p> <p>If an approval stage for the MDF request or MDF claim has multiple approvers, you can identify which approvers must approve in that stage.</p>
Actions Performed	<p>Actions performed information is displayed chronologically, starting with the latest action performed.</p> <p>Approval history tracks the following performed actions:</p> <ul style="list-style-type: none"> • Submitted by • Approved by • Returned by (Return reason and Comments if provided by approver) • Rejected by (Reject reason and Comments if provided by approver) • Withdrawn by • Delegated by • Escalated by

Type of Information Shown	Details
	<ul style="list-style-type: none"> Reassigned by
Future Approvers	<p>Future approvers can be either users, groups of users, or job roles.</p> <p>If the future approver is a user, then the full person name for each approver is shown. If the future approver is a job role, then the descriptive name of the role is shown. Users with the specified role won't be shown.</p>

Approve MDF Requests and MDF Claims

When the MDF request or MDF claim is submitted for approval, the human task flow is triggered and performs as it always has. However, approvers can also perform approval actions on the Edit pages for MDF requests and MDF claims.

First or final approvers can perform the following approval actions for MDF requests and MDF claims:

- Approve
- Reject
- Return

Note: The full list of approval actions is available to new customers by default. However, if you're an existing customer and you're using modified MDF request or MDF claim layouts, you only see the Submit, Delete, and Terminate actions. Your sales administrator must use Application Composer to add the other actions to your modified layouts.

The list of actions changes depending on the status of the request or claim and the user's role. For example, when an MDF request or MDF claim is in Draft status, partner and channel users can see the Submit and Delete actions. When an MDF request or MDF claim is in Pending status, approvers can see the Approve, Reject, and Return actions.

The following table shows all of the approval actions and provides a description of each.

Approval Action	Description
Approve	<p>This action is enabled for the assignee (whoever the approval task is assigned to, such as the specific user, users with a specific role, or all users in an approval group).</p> <p>If you're the final approver, the status of the MDF request or MDF claim changes to Approved after you approve it. If you're not the final approver, the status of the MDF request or MDF claim remains in Pending Approval after you approve it.</p>
Delete	<p>Channel operations manager, sales administrators (or any administrator roles you created), or any user on the team with edit or full access to the MDF request or MDF claim can delete it.</p> <p>The status of the MDF request or MDF claim must be Draft before it can be deleted.</p>
Reject	<p>This action is enabled for the assignee (whoever the approval task is assigned to, such as a specific user, users with a specific role, or all users in an approval group).</p> <p>After the MDF request or MDF claim has been rejected, its status changes to Rejected and no further actions are possible for the MDF request or MDF claim.</p>

Approval Action	Description
Return	<p>This action is enabled for the assignee (whoever the approval task is assigned to, such as a specific user, users with a specific role, or all users in an approval group).</p> <p>After the MDF request or MDF claim has been returned, its status changes to Returned. When users with edit or full access to the MDF request or MDF claim reopen the request or claim, only the Submit action is available.</p>
Withdraw	<p>Only the submitter of the MDF request or MDF claim can withdraw it.</p> <p>After the MDF request or MDF claim is withdrawn, its status changes to Withdrawn. When the submitter reopens the MDF request or MDF claim, only the Submit action is available.</p>
Terminate	<p>Partner users and channel users with edit or full access to the MDF request or MDF claim can terminate it.</p> <p>The MDF request or MDF claim must be in Approved status before it can be terminated.</p> <p>After the MDF request or MDF claim has been terminated, its status changes to Terminated and no further actions are possible for the MDF request or MDF claim.</p>

Create a MDF Request

Channel sales managers can use these steps to create a MDF request.

1. Sign in with your channel manager credentials.
2. On your Home page, click **MDF**.
3. On the MDF Requests page, click **Create Request**.
4. Provide information for the following fields:
 - Name - type a unique name for the MDF request.
 - Currency - select the type of currency for the request.
 - Requested Amount - type the amount of money you are requesting.
 - Type (optional) - select the type of expense you are requesting reimbursement for.
 - Partner - select your partner account for the request if it is not already provided.
 - Owner - select the user who owns the request if it is someone other than you.
5. Click **Save and Close** to save the request, or click **Save and Continue** if you want to add more information to the request such as:
 - A justification for the expense reimbursement.
 - Additional team members.
 - Notes about the request.
 - Activities tied to the request.
6. Click **Save and Close**.

7 Manage Your Partner Program Enrollments

Options for Renewing a Partner Program Enrollment

Partners can renew a partner program enrollment to continue enjoying the benefits associated with the program or to gain special renewal benefits available at the time of renewal.

Channel organizations can renew a partner's enrollment in a program when the enrollment isn't in the expiration term (the defined number of days before an enrollment expires) or when the partner enrollment is in Terminated status. This feature is only available to the channel organization.

Enrollment Renewal Process

Partner program enrollment renewal is available:

- Within the expiration term, to partners
- Outside the expiration term, or for Terminated programs, to the channel organization.

The process is the same for both instances: select **Renew** from the Action menu on the Enrollment Details page.

The renewal process is identical to the enrollment flow and is approved by the channel organization. When approved, the enrollment starts on the approval date, and remains in effect for the term specified in the program.

Terminated Programs

Partners can't enroll in or renew an enrollment in Terminated partner programs.

8 Manage Your Assets

Overview of Managing Assets

Partner sales managers and partner sales representatives can manage assets for their partner account from the channel organization's applications. Partners can access the assets pages directly from their home page by clicking Sales and then Assets.

Partners can use the Assets pages to do the following:

- Create assets or edit asset details for their partner account
- Add team members to an asset team
- Add contacts for an asset
- Create leads, opportunities, or service requests for an asset
- Export a list of their assets
- Delete an asset
- Reinstate an asset

Create and Edit Assets

Partner sales managers and partner sales representatives can use these steps to create or edit assets for their partner account.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.
3. To create an asset, click **Create Asset**. To edit an asset, click the **Asset Number** for the asset you want to edit.
4. Verify or edit information in the fields shown in the following table, including Asset Owner, Asset Number, Serial Number, Description, Status, Product Type, and Product.

Field Name	Description
Asset Owner	This field is automatically populated with the name of your partner account.
Asset Number	This field indicates a unique identification number for the asset. This number is automatically generated. However, it can be overwritten.
Serial Number	If the asset includes a serial number, you can type it in this field.
Description	Use this field to provide a description of the partner asset.

Field Name	Description
Status	Use this field to indicate the status of the asset. The valid values are Active and Retired. When you create an asset, the default value is Active.
Product Type	Use this field to indicate whether the asset is a product or product group. The default value is Product.
Product	Use this field to select the product or product group you're creating as the asset. The values in this field change depending on your selection in the Product Type field.

- Click **Save and Continue**.
- You see the additional fields shown in the following table, including Product Description, Price, Quantity, Start Date, End Date, and Attachments.

Field Name	Description
Product Description	This field provides a read only description of the asset.
Price	Use this field to provide a per unit price for the asset.
Quantity	Use this field to indicate the total number of this specific asset you have.
Start Date	Use this field to indicate the date on which you assume the asset.
End Date	Use this field to indicate the date on which the asset no longer belongs to you.
Attachments	Use this field to attach additional materials about the asset.

- Click **Save** or **Save and Close** to save your work.

Add Team Members to an Assets Team

Partner sales managers and partner sales representatives can use these steps to add team members to an asset team for their assets.

- Sign in with your partner sales manager or partner sales representative credentials.
- Click **Sales** and **Assets**.
- On the Assets page, click the **Asset Number** for the asset you want to add team members to.

4. On the Edit Asset page, click the **Team** subtab.
5. On the Asset Team page, select or create the account for the team member that you want to add to your asset.
6. Save your work.

Add Contacts to an Asset

Partner sales managers and partner sales representatives can use these steps to add a contact to one of their partner's assets.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.
3. On the Assets page, click the **Asset Number** for the asset that you want to add a contact to.
4. On the Edit Asset page, click the **Contacts** subtab.
5. On the Asset Contacts page, select or create the contact that you want to add to your asset.
6. Save your work.

Create Leads, Opportunities, or Service Requests for an Asset

Partner sales managers and partner sales representatives can use these steps to create a lead, opportunity, or service request for one of their partner's assets.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.
3. On the Assets page, click the **Asset Number** for the asset you want to create a lead, opportunity, or service request for.
4. On the Edit Asset page, click one of the following:
 - o Lead subtab
 - o Opportunity subtab
 - o Service Request subtab
5. Provide any required information for the lead, opportunity, or service request.
6. Save your work.

Export a List of Your Assets

Partner sales managers and partner sales representatives can use these steps to export a list of their partner's assets.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.

3. On the Assets page, click **Export**.
4. Indicate where you want to save the exported list of your assets.
5. Save your work.

Delete an Asset

When partner users delete an asset, they're deleting the relationship between the asset and their partner account. Partner sales managers and partner sales representatives can use these steps to delete an asset from their partner account.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.
3. On the Assets page, click the **Asset Number** for the asset that you want to delete.
4. From the **Actions** menu, select **Delete**.
5. Save your work.

Reinstate an Asset

Partner sales managers and partner sales representatives can use these steps to reinstate an asset for their partner.

1. Sign in with your partner sales manager or partner sales representative credentials.
2. Click **Sales** and **Assets**.
3. On the Assets page, click the **Asset Number** for the asset that you want to reinstate.
4. From the **Actions** menu, select **Reinstate**.
5. Save your work.

9 Manage Your Service Requests

Overview

Partner users can view and manage their service requests on Service Request pages in the channel organization's applications.

Note: The Service offering must be enabled for partners to see the Service Request icon on the channel organization's applications. Customers must have the appropriate license before sales administrators can enable the Service offering for them.

How Do Partners Use the Service Request Pages?

Partners can use the Service Request pages to request technical or sales support from the channel organization without needing to sign into a separate service application. Partners can use the Service Request pages to view a list of service requests, submit tickets to the channel organization and get resolution to questions, typically for sales support. Partners can also act as distributors or third-party business process providers who use service requests to raise an issue with the channel organization on behalf of an end customer.

Note: Channel account managers can also log and manage service requests on behalf of partners and the partner's end customers.

Create a Service Request

When partners create a service request, their partner company automatically becomes the partner on the service request, and the partner user becomes the contact for the service request.

Partners can use these steps to create a service request.

1. Sign in with your partner credentials.
2. On your home page, click **Service Requests** icon.
3. On the Service Request page, click **Create Service Request**.
4. Provide information for the fields shown in the following table.

Field Name	User Action
Title	Type a descriptive title for your service request.
Account	Provide the name of your customer account.

Field Name	User Action
Partner Account	Sales administrators can use Application composer to add a Partner Account field. This field shows the name of your partner company.
Primary Contact	The default value is your name.
Severity	Select a severity for the service request, such as Low , Medium , or High The default value is Low .
Critical	Click this check box if the service request you are creating is urgent.
Category	Select the appropriate category for your service request.
Product	If your service request pertains to a particular product, select it from this list.
Description	Type a description for your service request.

5. Click **Save and Close**.

10 Activities Management

Manage Your Activities

Partner salespeople can use the channel organization's applications to track appointments, create tasks, or add notes for their accounts, contacts, or transactions, such as leads or opportunities, that they own or have access to.

Activities created by partner users in the channel organization's applications are visible to the channel organization based on the user access level on the transactional objects. Similarly, Partners can view the activities created by the channel organization if they have been added to the activity team. These activities include:

- Appointments
- Tasks
- Logging calls

Schedule an Appointment

As a partner sales representative, you can use these steps to schedule an appointment with one of your accounts.

1. Sign in with your partner user credentials.
2. Click **Accounts**. Search for and select the account you want to schedule a meeting with.
3. Click the Activities tab and click **Create Appointment**.
4. Provide the appointment details.
5. Click **Save and Close**.

Schedule a Task

As a partner sales representative, you can use these steps to schedule a task for one of your accounts.

1. Sign in with your partner user credentials.
2. Click **Accounts**. Search for and select the account you want to schedule a task for.
3. Click the Activities tab and click **Create Task**.
4. Provide the task details.
5. Click **Save and Close**.

Add a Note

As a partner sales representative, you can use these steps to add a note to one of your accounts.

1. Sign in with your partner user credentials.
2. Click **Accounts**. Search for and select the account you want to add a note to.
3. Click the Notes tab and click **Create Note**.
4. Type your note.
5. Click **Save and Close**.

Create Partner Tasks from a Template

Channel managers and partner administrators can create tasks for partners from a task template.

If a valid task template has been created and the 'smart' Create Task button has been added to the Embedded Task List Overview page of the Activity object, then a Create Tasks from a Template option is available from the Create Task button. If no valid task templates have been created, then you do not see the Create Tasks from a Template option.

To create tasks from a task template:

1. Sign in with your partner administrator credentials.
2. From your springboard, click **Partners**.
3. Search for and select the partner you want to create a task for.
4. On the Edit Partner page, click the **Activities** subtab.
5. Click the arrow next to the Create Task button and select **Create Tasks from a Template**.

Note: If the administrator hasn't set up task templates and added the 'smart' Create Task button to the Activity object, then you do not see the Create Tasks from a Template option.

6. Select the template name from the available task templates.
7. (Optional) In the Owner field, enter the name of the owner of the task. If no owner is selected, the signed-in user becomes the default owner of the task.
8. (Optional) In the Start Date field, search for and select the date on which you want the task to appear for the partner. If you don't select a date, the Start Date defaults to the current date.
9. On the Create Tasks from a Template page, click **Save and Close**.

The tasks are created from the template.

11 Partner User FAQs

What's a partner profile?

Your partner profile contains partner specific information such as company phones, fax, web site, address, industry, geography coverage, partner company description, company number, and industries served.

Each channel organization has a different set of partner profile information that it would like to capture, for example, number of sales employees, tax ID, certifications, opportunities closed last year information, and so on.

How is partner profile information gathered?

Channel managers can enter partner profile information. The profile information helps channel managers understand and differentiate their partners to provide appropriate sales support and incentives to maximize channel sales.

Some partner profile information can also be derived from partner sales transactions, for example, closed partner opportunities revenue last year or partner data stored in external sources. Partner users and partner administrators can update some partner profile information.

Why am I unable to provision user accounts for the partner members I create?

Only users in approved or active partner companies can create user accounts. If you work for a prospective or registered partner company, you can create partner members but you can't create user accounts.

What's the difference between an MDF request and an MDF claim?

Partners can submit an MDF request for expense items that they plan to claim, before incurring the expense. The approver can decide whether or not to approve some or all of the expense.

Partners submit MDF claims for reimbursement of the approved expense after they have incurred the expenses.

What determines the level of access I have to MDF records?

Access to MDF records is based on team membership for both channel and partner users. However, by default, only partner users with either the Partner Sales Manager or the Partner Administrator role have access to MDF records.

The following table shows the three levels of access for team members, including Full, Edit, and View.

Access Level	What Team Members Can Do
Full	Team members with full access can edit the MDF record, and can add or remove team members and change the owner of the MDF record.
Edit	Team members with edit access can edit the MDF record, but they can't make changes to the team or change the record ownership.
View	Team members with view access can only view the MDF record.

What's a partner program?

Channel operations managers create partner programs to define program benefits and include tiers for partners to encourage the partners to enroll into programs.

You can design your partner program to generate revenue from an indirect channel for a product or a set of products, expand geographic reach (emerging markets), new product launch, or provide training. Your partner program can be in Draft, Published, Unpublished, or Terminated status.

A partner program can contain the following:

- Program objectives that are aligned with the channel strategy
- Program benefits that are aligned with the channel strategy and provide incentives to partners
- Legal terms and conditions as part of the program agreements that are crafted in collaboration with the channel operations and legal team
- Program measures against which the partner performance will be evaluated

What's a partner program enrollment term?

Partner programs can have terms with duration in days, months, or years. When partners enroll in a partner program, they must apply for renewal by the end of the program's term. An automatic enrollment renewal can be set up.

Optionally, an enrollment term can be null. A program enrollment term defined as null has no expiration.

