

Oracle Fusion Cloud Sales Automation

**Getting Started with Your Partner
Relationship Management
Implementation**



Oracle Fusion Cloud Sales Automation
Getting Started with Your Partner Relationship Management Implementation

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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

Some application pages have help icons  to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

Get Training

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We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide provides implementation users and channel sales users with the concepts and procedures necessary to configure your implementation for channel sales.

Since the assumption made in this guide is that you're building a channel sales branch for your existing direct sales organization, the Getting Started with Your Implementation guide is a prerequisite. This guide leverages the default settings provided by Oracle and doesn't provide detailed explanations of all available features. This guide also assumes all setup steps described in this guide pertain to features and functionality available to channel sales users and partners in the simplified user interface.

Related Guides

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

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

Title	Description
Getting Started with Your Implementation	Describes how to set up sales automation capabilities in your application using a case study to describe concepts and procedures.
Using Partner Relationship Management for Channel Managers	Describes user tasks to help channel sales managers, channel account managers, and channel operations managers perform day-to-day business tasks.
Using Partner Relationship Management for Partners	Describes user tasks to help partner sales managers, partner salespeople, and partner administrators perform day-to-day business tasks.
REST API for Sales and Fusion Service	Describes each REST API resource so that you can view and manage data stored in Oracle Engagement Cloud.
SOAP Web Services for Sales and Fusion Service	Describes SOAP web services to integrate with or extend Oracle Engagement Cloud.
Implementing Partner Finder	Describes how to set up your own custom Partner Finder using a predefined template on top of Oracle Partner Relationship Management.
Implementing Sales	Describes the tasks that you perform to configure and set up your sales applications.

Title	Description
Understanding Import and Export Management for Sales and Fusion Service	Describes how to import legacy and other data into your application using Import Management.
Creating and Administering Analytics	Describes how to create and modify application analytics and reports.
Configuring Applications Using Application Composer	Describes how to use Application Composer to modify and configure your applications.

Related Topics

- [Oracle Help Center](#)

2 Partner Relationship Management

Overview of Partner Relationship Management and Channel Sales

Partner relationship management functionality allows companies to use indirect or channel sales, where salespeople working for your partner sell your company's products or services.

What's the Difference Between Direct and Channel Sales?

In a direct sales environment sales representatives, who are employees of your company, sell your company's products and services.

The best way to understand channel sales is to think of it as a branch of your company tree that connects your internal sales team with teams of partner sales representatives who are external to your company.

In a channel sales scenario, members of your internal sales team, called channel managers, work with external partners to sell your products and services. Your channel managers work closely with these external partner sales representatives to make sure they have your most recent product and service information. Channel managers monitor the sales activities of your partners to prevent issues such as duplication of leads or opportunities between your internal sales team and your external partner sales force, or any other type of channel conflict. Channel managers also provide incentives for their partners to sell your products or services, or to increase recognition of your brand in new or expanding markets.

What Needs to be Done?

By default, your sales applications are configured for direct sales. Since channel sales expands your sales capabilities beyond your internal organization, sales administrators and channel managers must set up and secure the business objects they want to use to work with teams of external partner sales representatives. These objects include:

- Partner Accounts and Partner Contacts
- Customer Accounts and Contacts
- Partner Announcements
- Partner Activities
- Partner Programs
- Partner Program Enrollments
- Partner Business Plans and Objectives
- Leads
- Opportunities
- Deal Registrations
- Marketing Development Funds (MDF)
- Business Intelligence

How you configure your business objects depends on how you plan to use them for channel sales.

Beyond setting up the business objects, you must also configure other functionality for channel sales, such as sales territories and assignment so that your leads and opportunities go to the most appropriate partners.

How to Use This Guide

Here's how to use this guide:

- Use the Setup Task Overview chapter to get an overview of the tasks covered in this guide.
- Read the brief conceptual overviews at the beginning of each chapter to understand the setups the chapter covers.
- Use the Setup Overview as a guide to the setups you must perform. The remaining topics in the chapter provide the step-by-step details of how to perform each of those setups.
- Refer to the following guides for full explanation of the different features and options:
 - Getting Started with Your Sales Implementation
 - Implementing Sales
 - Understanding Import and Export Management for CX Sales and Fusion Service
 - Configuring and Extending Applications

Prerequisites

Since partner relationship management is a set of features within your sales applications, and since there is no need to duplicate content from guide to guide, this guide assumes the following:

- You have already implemented and configured your applications for direct sales as specified in the *Getting Started with Your Implementation* guide and the *Implementing Sales* guide.
- You are now ready to implement and configure partner relationship management functionality for channel sales as a branch of that existing direct sales organization.

Supported Business Use Cases

This guide provides general setup information about all of the partner relationship management features, and provides worked examples that support the following two business use cases:

- *A partner brings in new business:* This process starts when the partner creates and submits a deal registration. The default, but configurable, workflow routes the deal registration request to the channel manager for approval and notifies the channel manager that there is a pending deal registration to approve. The channel manager identifies the right account and runs a duplicate check against existing accounts, contacts, and opportunities. The channel manager can also request additional information from the partner if questions still exist. The channel manager then approves the deal registration. The approved deal registration becomes an opportunity that partner works on and hopefully closes.
- *The brand owner offers business to a partner:* This process starts when the brand owner sends a lead to the partner. The default, but configurable, workflow routes the lead to the partner for acceptance or rejection, and notifies the partner that there is a lead to review. The partner can accept the lead and become the owner of the lead, or reject the lead if the partner thinks it's not a good business fit. The channel manager can then reassign the rejected lead to another partner. When the partner accepts the lead there are two routes the partner can take. In the first route, the partner fully qualifies the lead and can then request the channel manager convert

the lead into an opportunity. In the second route, the partner can convert the lead to a deal registration. The channel manager then approves the deal registration and the lead is converted to an opportunity.

What's in Each Chapter?

The chapters in this guide are organized in the logical sequence you follow when implementing and configuring the various aspects of channel sales functionality.

The following table lists and describes the chapters in this guide.

Chapter Title	Description
About this Guide	Discusses starting point assumptions, the supported use cases, and a description of each chapter.
Understanding Partner Relationship Management Channel Sales	Describes channel sales and the user roles involved.
Channel Sales Setup Task Overview	Lists the high-level configuration tasks in order.
Creating Channel Sales Users	Discusses the ways to create channel sales users and provides steps for each creation method.
Configuring Your Sales Applications for Channel Sales	Describes the business objects that need to be configured to handle channel sales, including: <ul style="list-style-type: none">• Partner Accounts and Partner Contacts• Leads• Opportunities• Deal Registrations
Configuring Data Migration for Channel Sales	Discusses the import of partner relationship management objects and provides a worked example for Partner Accounts and Partner Contacts.
Setting Up Sales Territories and Assignment for Channel Sales	Discusses how to configure partner territories and territory assignment for channel sales.
Configuring Business Intelligence for Channel Sales	Describes how to configure audit reporting and how to expose the Reports tab on Channel Sales pages.
Expanding Your Channel Sales Capabilities	Provides steps to configure additional business objects for channel sales use.
Additional Learning Resources	Provides a list of locations to find additional documentation, tutorials, support articles, and other resources.

Overview of Channel Sales Roles

Channel sales involves a channel organization working to recruit channel partners and sell the channel organization's products and services through these partners to grow their business.

Both channel organizations and their partners use partner relationship management functionality to align their business practices so that they can more successfully close deals. Channel organizations can also use the functionality to analyze partner performance, thus optimizing their time and financial investments in their partners.

Channel Sales Job Roles

Job roles provide users with access to different functions and data so they can accomplish their jobs. Channel sales utilizes several distinct job roles to accomplish these goals.

The following table lists the job roles involved with channel sales and provides a description of the general responsibilities of each role.

Job Role Name	Job Role Description
Channel Operations Manager	Manages programs and business processes to improve the productivity of the channel sales team and their channel partners in context of the partner relationship management functionality. This role is also responsible for developing metrics and reports to track and measure the success of the overall channel business.
Channel Account Manager	Manages the business relationship between a channel partner and the brand owner. This role is responsible for planning and supporting collaborative sales, marketing, and business processes designed to increase partner productivity and engagement.
Channel Sales Manager	Manages and monitors the activities and the performance of the channel account managers.
Partner Administrator	Manages the company's profile and controls the users and their access to the channel organization's applications. This role is also responsible for maintaining and ensuring the company is leveraging partner programs and incentives that best suit their specific business needs.
Partner Sales Manager	Manages and monitors the activities and the performance of the partner sales representatives. This role is also responsible for managing key planning tools and programs. This role also manages business plans and marketing development funds.
Partner Sales Representative	Manages the sales relationship between the channel partner and the customer, and is primarily responsible for selling the brand owner's products or services. This role leverages functionality such as lead and opportunity management, and deal registration to maximize sales productivity.
Application Implementation Consultant/ Sales Administrator	Responsible for initial implementation and configuration. Manages sales and business processes to improve productivity of the sales team.

Access Groups and Access Extension Rules

Job roles provide users with access to different functions and data. In addition to job roles, you can use access groups to provide sales resources with additional access to sales object data. Access groups are an alternative way of granting data permissions to users. You use access groups to supplement the data access users receive through their job roles and other security mechanisms.

There are two types of access groups: custom access groups and system access groups. Custom access groups are groups you create to provide users with access to data according to the needs of your business. System access groups, meanwhile, are access groups that Oracle creates for you.

You can use access groups with these objects:

- Partner

If you have secured partners using access groups, then that same access automatically includes the partner contacts belonging to the partner. This means that all members of an access group with access to a specific partner can automatically access that partner's contacts.

- Deal Registration
- MDF Budget
- MDF Request
- MDF Claim
- Program Enrollment

Note: Access groups grant access to data, but users must also have the corresponding functional privileges to access objects.

Meanwhile, just as access groups give users access to sales object data, access extension rules give users access to related object data. This extended access greatly simplifies security configuration. For example, if you have secured access to an object such as Partner using access groups, then you can create an access extension rule to extend the access defined for the Partner object to a related object, such as Deal Registration. All members of an access group who can access the Partner data will then have the same access to Deal Registration data.

Using access extension rules, you can extend access group security defined on these objects to their related objects:

- Partner
- MDF Budget
- MDF Request

Note: Many objects support the use of access groups for data security, including the Product object. When using access groups with the Product object, note that it could result in a situation where users working with deal registrations might not have access to one, or even all, of the products included in those deals. In such cases, users can still remove such products from a deal registration, modify product attributes in the deal registration, and copy or approve the deal registration. However, if users don't have access to a product, then they can't add it to a deal registration.

To learn more about using access groups, see the topics in the Related Topics section.

Related Topics

- [Overview of Access Groups](#)
- [Overview of Managing System Access Groups](#)

3 Channel Sales Setup

Overview of Channel Sales Configuration

The following topic provides a high-level list of the steps you need to take to configure your application for channel sales, the setup task names for each step, and the name of the implementation project folder for each step.

To configure your application for channel sales, perform the following tasks:

The following table lists the configuration steps you must take to set up your implementation for channel sales, including channel user creation, configuration of the functional areas you want to use with channel sales, partner user creation and data migration, territory and assignment configuration, and business intelligence setup. This table also provides the associated setup task names where applicable.

Step Number	Step Description	Setup Task Name
Step 1.	<p>Sign in with your sales administrator credentials and create the following channel sales users:</p> <ul style="list-style-type: none">• Channel Operations Manager• Channel Sales Manager• Channel Account Manager <p>These users are part of your company. Since you already implemented your applications for direct sales, you don't need to create the root resource organization for your sales organization hierarchy. You only need to assign these users with the resource roles provided by Oracle.</p> <p>If you have customer-defined resource roles, you can use the Manage Role Provisioning Rules task to create role provisioning rules that assign these roles to your channel sales users.</p> <p>The best method to create channel sales users is to manually create a few users at the top of your channel sales hierarchy in the UI to test your setups and to make sure the provisioning rules work as you intend them to. You can then import the rest of the channel sales organization hierarchy by using the template provided by Oracle.</p>	<p>Creating channel sales users in the UI:</p> <ul style="list-style-type: none">• Users and Roles <p>Creating channel sales users with Import Management:</p> <ul style="list-style-type: none">• Manage File Import Mappings• Manage File Import Activities• Manage HCM Configuration for Coexistence
Step 2.	<p>Configure the functional areas you want to use for channel sales, including:</p> <ul style="list-style-type: none">• Partner Accounts and Partner Contacts (partner sales representatives)• Partner Programs	<p>Manage Partner Account Profile Options</p> <p>Manage Partner Contact Profile Options</p> <p>Manage Partner Program Profile Options</p>

Step Number	Step Description	Setup Task Name
	<ul style="list-style-type: none"> Partner Program Enrollments Leads Opportunities Deal Registrations Partner Business Plans and Objectives Marketing Development Funds (MDF) 	<p>Manage Partner Program Enrollment Profile Options</p> <p>Manage Lead Profile Options</p> <p>Manage Opportunity Profile Options</p> <p>Manage Deal Registration Profile Options</p> <p>Manage Partner Business Plan and Objective Profile Options</p>
Step 3.	Configure Oracle Social Network for channel sales.	Manage Oracle Social Network Objects
Step 4.	Migrate your data to Oracle. Create or import your partner accounts and partner contacts (partner sales representatives) and build your teams of partner contacts.	<p>Import Partner Users</p> <p>Define Sales Partners</p> <ul style="list-style-type: none"> Manage Partner Profile Options Manage Partner Lookups <p>Configure Partner Profile</p> <ul style="list-style-type: none"> Manage Partner Level Standard Lookups Manage Partner Status Standard Lookups Manage Partner Public Status Standard Lookups Manage Partner Compliance Status Standard Lookups Manage Partner Expertise Standard Lookups Manage Partner Certification Standard Lookups Manage Partner Channel Types Standard Lookups <p>Define Partner Tasks</p> <ul style="list-style-type: none"> Manage Partner Task Template Manage Partner Note Type Mapping Manage Partner Assessment Template
Step 5.	Configure sales territories and territory assignment for channel sales.	<p>Manage Administrator Profile Values</p> <p>Sales Leads and Deal Registration:</p> <ul style="list-style-type: none"> Manage Sales Lead Assignment objects Manage Sales Lead Assignment Rules <p>Opportunities and Partner Accounts:</p> <ul style="list-style-type: none"> Manage Sales Assignment Manager Objects

Step Number	Step Description	Setup Task Name
		<ul style="list-style-type: none">Manage Sales Assignment Manager Rules
Step 6.	Configure business intelligence for channel sales.	Not applicable

4 Create Channel Sales Users

Before You Create Channel Sales Users

What to Do Before Creating Channel Sales Users

When you create sales application users either in the UI or by importing them from a file, you not only provision the permissions the users need to do their jobs, but you also build the organization chart for your sales organization.

This means that you must set up not only the provisioning rules, but also the elements used to create the organization chart in the Resource Directory.

Each channel sales user must have:

- A resource role

You must assign a resource role, a name describing the role each resource plays in the organization, to each channel sales user you create. Resource roles display right underneath user names in the resource directory and elsewhere in the UI. They are also used as the primary condition in the role provisioning rules

- A resource organization

You must create a resource organization for every channel sales manager. Each individual contributor who is not a manager automatically inherits the manager's organization. The name of the resource organization need not be any formal department name, but you should avoid using manager names to accommodate hierarchy changes.

The resource organization hierarchy is built based on the management hierarchy you specify when you create your channel sales users. You must enter a manager for each user you create.

What Oracle Provides for You

Oracle provides you with the standard channel sales organization resource roles and the role provisioning rules that automatically assign users with the job roles and abstract roles required to do their job.

The following channel sales resource roles supplied by Oracle will trigger the automatic assignment of job and abstract roles:

- Channel Account Manager
- Channel Sales Manager
- Channel Operations Manager

Note: For each of the resource roles provided by Oracle, there is a corresponding job role with the same name.

For example, when you create a user as an employee with the provided Channel Sales Manager resource role, the application automatically provisions the Channel Sales Manager job role and the Resource abstract role. Because you are creating the user as an employee, the application also provisions the Employee abstract role.

Note: If you are implementing your sales applications in a Global Single Instance environment, then Oracle does not provide these role-provisioning rules for you. You must create them manually.

The following table lists the channel sales role-provisioning rules provided by Oracle, the condition which triggers the provisioning, and the job and abstract roles the rule provisions. You can obtain a description of each job and abstract role from the Security Reference guide for sales applications.

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned
Channel Operations Manager	HR Assignment Status is Active Resource Role is Channel Operations Manager	Channel OperationsManager Resource
Channel Sales Manager	HR Assignment Status is Active Resource Role is Channel Sales Manager	Channel Sales Manager Resource
Channel Account Manager	HR Assignment Status is Active Resource Role is Channel Account Manager	Channel Account Manager Resource

Overview of Channel Sales Users Setup

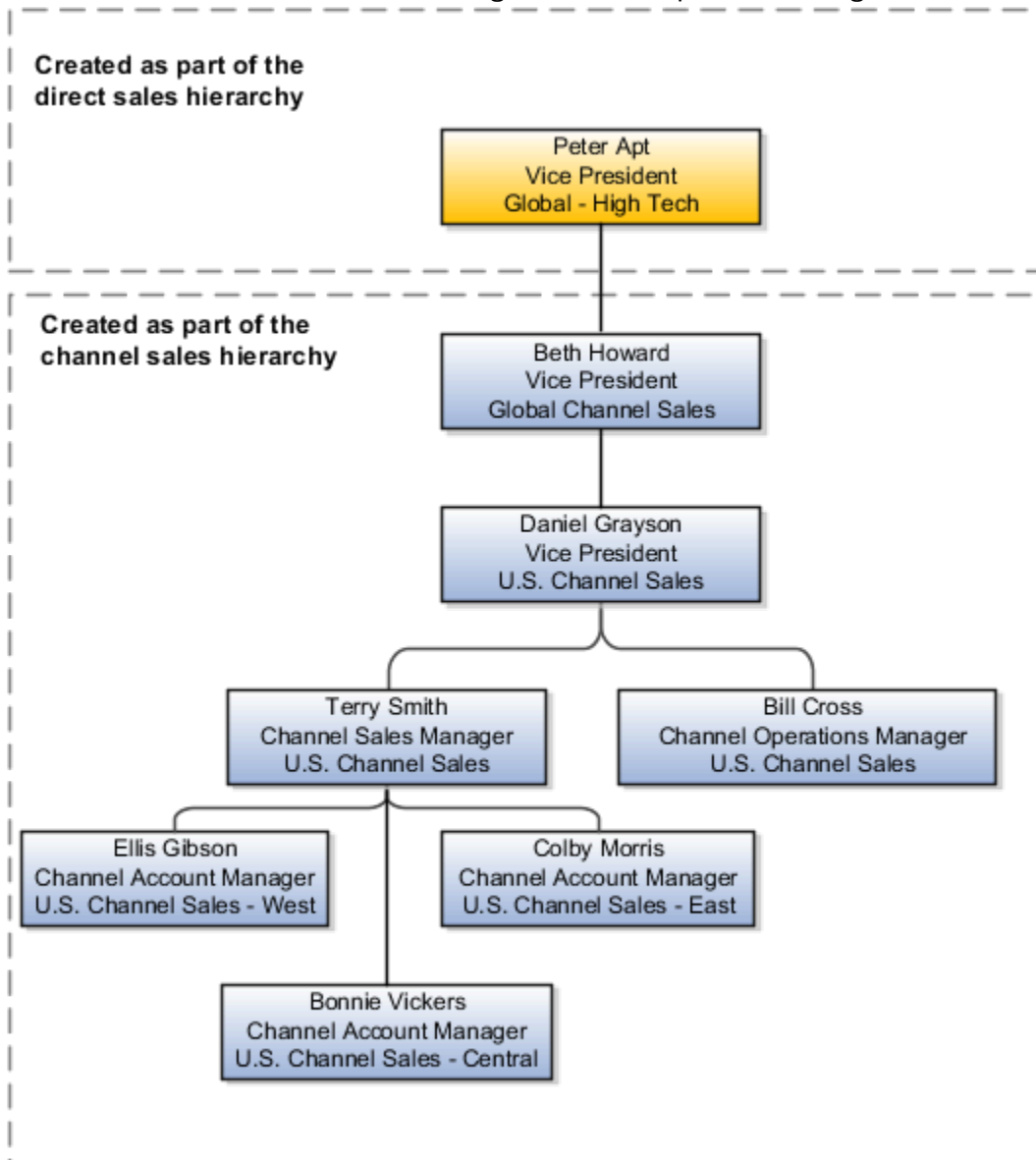
Because you must specify the manager for each channel sales user you create, start creating users from the top of the channel sales hierarchy and work your way down.

You create channel sales users in the Create User page, which you open from the Manage Users work area. You can navigate to the work area by clicking the Users and Roles task in the Create Sales Users folder in the implementation project.

Since channel sales is a branch of your existing direct sales organization, the channel sales branch must be tied to the organizational hierarchy of your direct sales team. The following figure shows how a channel sales branch fits with the direct sales hierarchy of Vision Corp.

This figure shows the organizational structure of an example channel sales team for Vision Corporation. The channel sales team branches out from the direct sales team at the Vice President of Global High Tech level and the channel sales team includes a Vice President of Global Channel Sales, a Vice President of U.S. Channel

Sales, and a team of Channel Sales Managers, Channel Operation Managers, and Channel Account Managers.



What to Do Before Importing Channel Sales Users

After you create several channel sales users in the UI to test your setup, you are ready to import the rest of the users from a text file.

The import creates the resource organizations for each manager, creates the channel sales organization hierarchy, and provisions the channel sales users with the job roles and abstract roles they need. To speed up your import, you can download a template provided by Oracle.

You can open the different import tasks directly from the **Create Sales Users** folder in the implementation project or by searching for the tasks by name from the Setup and Maintenance work area.

The following table provides the steps for importing channel sales users, including downloading the import template, replacing the sample data with your data, adding columns to the template for additional data and mapping the new data, importing the data, and testing the import results. This table also lists the task name for each step (where applicable).

Step	Description	Task Name
1	<p>Download the template from the Employee Resource Seeded Mapping - Comprehensive mapping.</p> <p>To display the mapping, search for the seeded mappings for the Employee Resource object.</p>	Manage File Import Mappings
2	<p>Replace the sample data in the template with your data, preserving the order of the columns.</p> <p>You must obtain some of the values for your import from the application itself. For example, you must include the names of the business unit and the legal entity as it appears in the application and you must include the codes for the resource roles you are using.</p>	This is a task you perform in your import file.
3	<p>Append to the last column in your import file any additional attributes you want to import.</p> <p>For example, to control which user records send you the emails with user credentials, append a column with the heading WorkerProfile_SendCredentialsEmail.</p> <p>By importing a value of Y or N for each user, you can specify which user records generate the email.</p> <p>Make sure that you obtain the sign-in information for a representative sample of users, so that you can use those users for testing. For example, to test opportunity assignment and forecasting, you can sign in as a salesperson and manager in each regional sales organization. To test forecasting and quotas, you must be able to sign in as the sales administrator. If you are importing the users, then you can indicate in your import file if you want to receive the credentials emails.</p>	This is a task you perform in your import file.
4	<p>If you added any additional columns to the original template, you must create a new mapping for your import. To do this, you copy the predefined mapping and add the additional import column to the copy.</p>	Manage File Import Mappings
5	<p>Import the file using the mapping you copied and modified.</p>	Manage File Import Activities
6	<p>Enable searching of the imported users.</p>	Manage HCM Configuration for Coexistence

Step	Description	Task Name
7	<p>Sign in as one of the sales users you created, and review the resource organization by navigating to the Resource Directory. The directory displays a graphical representation of the resource hierarchy.</p> <p>You can correct any minor errors that you find and upload user photos by signing in as a setup user again. You search for and edit the user records in the Manage Users work area.</p>	This task is not available in the implementation project. Instead, select Resource Directory in the Navigator.

Employee Resource Import Template

The following table describes the columns contained in the Employee Resource Seeded Mapping - Comprehensive import template and the values these columns expect.

The template file includes a header row with the key attributes for your import, including all the required fields. The attribute name in each column consists of two parts separated by a period. These correspond to selections you make for mapping the import file to the attributes in the application.

The file columns are arranged in the same order as a mapping Oracle provides for you. If you do want to add additional columns, then add them after the last column.

The following table lists the columns in the order they are included in the template and provides instructions for the values each attribute expects. You can get more detailed information about these attributes from the File Based Data Import guide available for sales applications on docs.oracle.com.

Template Header Column Name	Value to Import
WorkerProfile_BusinessUnit	Enter the name of the business unit created for you when you signed up for the service. You can obtain this value from the Business Unit field in the Employee Information region of Create User page, as described in this topic.
WorkerProfile_LegalEntity	Enter the legal entity created for you. You can obtain this value from the Legal Employer field in the Employee Information region of Create User page, as described in this topic.
WorkerProfile_FirstName	Enter the first name as you want it to appear in the sales application.
WorkerProfile_LastName	Enter the last name as you want it to appear in the sales application.
WorkerProfile_EmailAddress	<p>You must enter a unique email address. The application sends the initial sign-in credentials to this address unless you:</p> <ul style="list-style-type: none"> Redirect the email to an alternate user Delay the sending of the email. <p>These options are described in related topics.</p>
WorkerProfile_ManagerEmail	Enter the manager's email address. The application uses this address to build the management hierarchy.

Template Header Column Name	Value to Import
WorkerProfile_PersonType	<p>Indicates the type of worker you are importing. Because you are creating users who are employees, you can either enter EMP (for employee) or leave this column blank. The application supplies the EMP value by default.</p> <p>You can use other values, such as CWK (contingent worker), but doing so is useful only if you are building an integration with the Oracle HCM Cloud.</p>
ResourceProfile_RoleCode	<p>Enter the internal code for each resource role.</p> <p>For sales, the codes for the sales resource roles provided by Oracle include:</p> <ul style="list-style-type: none"> SALES_VP CHANNEL_SALES_MANAGER CHANNEL_OPERATIONS_MANAGER CHANNEL_ACCOUNT_MANAGER <p>Follow the procedure in this topic to obtain additional codes.</p>
ResourceProfile_RoleTypeCode	<p>Always enter CHANNEL_SALES (uppercase) in all rows for sales resource roles. For other types of resource roles this value is different. For example, for the customer data management role, the code is CUSTOMER_DATA_MANAGEMENT.</p>
ResourceProfile_CreateUserAccount	<p>Always enter a Y.</p>
ResourceOrganizationMembership_TreeCode	<p>Always enter GLOBAL_CHANNEL_SALES_MARKETING.</p>
ResourceOrganizationMembership_ParentTreeCode	<p>Always enter GLOBAL_CHANNEL_SALES_MARKETING.</p>
ResourceOrganizationMembership_OrganizationUsage	<p>Always enter CHANNEL_SALES_RESOURCE_ORG</p>
ResourceOrganizationMembership_OrganizationName	<p>For each manager, enter the name of his or her resource organization. Leave this column blank for the individual contributors.</p> <p>The organization names you enter here appear in the resource directory and elsewhere in the UI.</p>
ResourceOrganizationMembership_ParentOrganizationName	<p>Enter the organization name of the person's manager. You must make this entry both for the managers and individual contributors.</p> <p>The names must precisely match the names you entered for OrganizationName, so watch for capitalization and spaces.</p>

Add Channel Sales to Vision Corp.

To support the business use cases mentioned previously, we must create a channel sales branch of Vision Corp.

The channel sales team consists of the following:

- Beth Howard - VP Global Channel Sales
- Daniel Grayson - VP US Channel Sales
- Terry Smith - Channel Sales Manager
- Bill Cross - Channel Operations Manager
- Colby Morris - Channel Account Manager
- Bonnie Vickers - Channel Account Manager
- Ellis Gibson - Channel Account Manager

The following table shows the ResourceOrganizationMembership_OrganizationName and ResourceOrganizationMembership_ParentOrganizationName entries for each member of the channel sales branch of Vision Corp. listed above.

WorkerProfile_FirstName	WorkerProfile_LastName	ResourceOrganizationMembership_OrganizationName	ResourceOrganizationMembership_ParentOrganizationName
Beth	Howard	Global Channel Sales	Global High Tech
Daniel	Grayson	US Channel Sales	Global Channel Sales
Bill	Cross	US Channel Sales	US Channel Sales
Terry	Smith	US Channel Sales	US Channel Sales
Colby	Morris	US Channel Sales - East	US Channel Sales
Bonnie	Vickers	US Channel Sales - Central	US Channel Sales
Ellis	Gibson	US Channel Sales - West	US Channel Sales

Obtain the Names of the Business Unit and Legal Entity

1. Sign in as a setup user.
2. Open the task **Users and Roles** from the implementation project or search for the task by name in the Setup and Maintenance work area.
3. Click **Create**.

The Create User page appears.

4. In the Employment Information region, select **Employee** as the **Person Type**.
5. You can obtain the business unit and legal entity values for your file from the **Business Unit** and **Legal Entity** lists.
6. Click **Cancel**.

Obtain the Resource Role Codes

1. Sign in as a setup user.
2. Open the task **Manage Resource Roles** task from the implementation project. Alternately, search for the task by name in the Setup and Maintenance Work area.
The Manage Resource Roles page appears.
3. To obtain a list of resource roles for sales, select **Sales** from the **Role Type** list and click **Search**.
4. Click **Edit** for each resource role that you want to import. The value in the **Role Code** field is the value you must include in your file.

Create Channel Sales Users in the UI

To support the business use cases mentioned previously, we must create a channel sales branch of the Vision Corp. sales organization as depicted in the Getting Started with Your Implementation guide for sales.

In this guide Peter Apt is the vice president of Global High Tech sales for Vision Corp., so the top tier of our channel sales branch reports to him.

The following table lists the name of each resource to create, who they report to, their job title, and their department name.

Name	Reports To	Job Title	Department
Beth Howard	Peter Apt	Sales VP	Global Channel Sales
Daniel Grayson	Beth Howard	Sales VP	US Channel Sales
Terry Smith	Daniel Grayson	Channel Sales Manager	US Channel Sales
Bill Cross	John Dunbar	Channel Operations Manager	US Channel Sales
Colby Morris	Terry Smith	Channel Account Manager	US Channel Sales - East
Bonnie Vickers	Terry Smith	Channel Account Manager	US Channel Sales - Central
Ellis Gibson	Terry Smith	Channel Account Manager	US Channel Sales - West

Steps to Create Channel Sales Users in the UI

Use these steps to create channel sales users in the UI.

1. While signed in as a setup user, open the **Users, Roles and Delegations** task from the implementation project. You can also open this task by clicking **Users, Roles and Delegations** under the **My Team** heading in the Navigator, or you can search for the task by name in the Setup and Maintenance work area.

2. On the Users, Roles and Delegations page, click **Create**.

The Create User page appears.

3. Enter the user's name and a unique email address in the Personal Details region.

The application normally sends the initial sign-in credentials to this email address when you save the record.

4. The application provides the current day's date in the **Hire Date** field and uses that date as the start date for the resource.

If you are planning to use quotas, then you must make sure that the hire date is a date before the start of the first quota period. For example, if you are allocating monthly quotas for fiscal year July 01, 2015 to June 30, 2016, then you must enter a hire date of 7-1-2015 or earlier. You cannot change the hire date after you create the user.

5. In the User Details region, enter the user name.

If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the email as the user name.

6. In the User Notification region, select the **Send User Name and Password** option if you want the credentials email to be sent to an alternate user.

Tip: Make sure that you obtain the sign-in information for a representative sample of users, so that you can use those users for testing. For example, to test opportunity assignment and forecasting, you can sign in as a partner sales representative and channel account manager in each regional sales organization. To test quotas, you must be able to sign in as the sales administrator or channel operations manager. If you are importing the channel sales users, then you can indicate in your import file if you want to receive the credentials emails.

7. Make the following entries in the Employment Information region:

- o Select **Employee** from the **Person Type** list.
- o From the **Legal Employer** list, select the legal employer Oracle created for you using the information you provided when you signed up with Oracle. There should be only one value available: your company name followed by the suffix LE.
- o From the **Business Unit** list, select the business unit created for you when you signed up. There should be only one value available: your company name followed by the suffix BU.

Neither the legal employer name nor the business unit name are visible in the sales application, so the names do not need to correspond to actual entities in your company.

Note: The remaining fields in the Employment Information region are not used by your sales applications. These fields include: Job, Grade, Department, Location, Mail Stop, and Manager.

8. Make the following entries in the Resource Information region:

- a. From the **Resource Role** list, select the role the user plays in the resource organization.
For example, for the channel sales manager, select Channel Sales Manager as the resource role.
- b. From the **Reporting Manager** list, select the user's manager.
- c. If the user you are creating is a manager, and if you already created a resource organization for this manager, then select the resource organization from the **Organization** list. For the top of the hierarchy, select the resource organization you created earlier.

If you did not already create the resource organization, then:

- i. Click **Create** link at the end of the **Organization** list.

The Create Organization window appears.

- ii. Enter the organization name.
- iii. Make sure the **Sales** option is selected and click **OK**.
- d. If the user you are creating is not a manager then the resource organization is automatically copied from the manager.

9. Click **Autoprovision Roles**.

The application provisions the job and abstract roles according to the role provisioning rules.

10. Click **Save and Close**.

The application creates the channel sales user. Unless you deselected the **Send User Name and Password** option, the application also sends the e-mail with the user name and password.

Create Channel Sales Users Using Import Management

If you have a large number of channel sales users, then it's much faster to use import management to create them instead of creating them individually in the UI.

Use these steps to import the .csv file with your channel sales user data:

1. Sign in as a setup user.
2. Open the **Manage File Import Activities** task. You can search for the task by name in the Setup and Maintenance work area.

The Manage Import Activities page appears.

3. Click **Create**.

The Create Import Activity: Enter Import Options page appears.

4. In the **Name** field, enter a name to identify your import activity in the application.
5. From the **Object** list, select **Employee resource** to import channel sales users.
6. In the **Source File** region, select the **Desktop** option.
7. Keep the **File Type** as **Text file** and **File Selection** as **Specific file**.
8. Click **Browse** and select your data file.
9. Select **Comma separated** or another delimiter from the **Data Type** list.
10. Select the **Header row included** option because the file includes a header.

11. From the **Import Mapping** list, select the mapping you created.
12. Click **Next**.

Create Import Activity: Map Fields page appears displaying your mapping.

13. Click **Next**.

The Create Import Activity: Schedule page appears.

14. Click **Next**.

The Create Import Activity: Review and Activate page appears.

15. Click **Activate**.

16. The application returns you to the Manage Import Activities page where you can monitor the status of your import.

You may have to scroll to the right to see the import status and you must periodically refresh the page to see status changes.

An import activity with a status of **Completed** or **Completed with Errors** indicates that the import activity completed. To obtain error details, click the import status to see the logs.

5 Configure Your Sales Applications for Channel Sales

Partner Relationship Management for Channel Sales Setup

To take advantage of partner channel sales capabilities, you must perform some adjustments that enable various partner-related aspects of the user interface. Other setup tasks may be required depending on your business needs.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant.

The following table describes the high-level tasks to set up partner channel sales capabilities, including using Application Composer to modify UI labels, modify page layouts for fields tied to specific roles, and modify notification workflows. The table also includes channel sales setup tasks using Page Composer, such as modifying page layouts for standard fields that use validation logic, hiding fields from roles that don't need to see them, and creating their own saved searches. Refer to the related topics for more information.

Task	Description	Where Performed
Modify UI labels	Change field display labels for partner users.	Application Composer
Modify page layout for fields tied to specific roles	Use dynamic layout by role when you have fields that always need to be exposed for a role, and these fields aren't linked by validation logic.	Application Composer
Modify page layout for standard fields with validation logic	Use when you want to display hidden, standard fields that have linked logical dependencies.	Page Composer
Modify landing page for a role	Modify the list (landing) page layout for an object by adding fields or columns you want to expose for a specific partner role.	Application Composer
Turn off the new fields you added in Application Composer for every role that doesn't need them	Application Composer doesn't support editing object list (landing page) tables by role, so you must disable any new fields you added in Application Composer for every role that doesn't need them.	Page Composer
Create saved searches	Create your own saved searches (saved lists) for end users to speed and filter their searches.	Page Composer

Task	Description	Where Performed
Perform additional standard setups for Leads integration	Set profile options, confirm assignment rules, and set up assessment templates.	Setup and Maintenance work area, Lead Management offering
Perform additional standard setups for Opportunities integration	Set profile options, confirm assignment rules, and set up assessment templates.	Setup and Maintenance work area, Sales offering
Create your own workflow to notify users of partner opportunity actions	Create a customer-defined workflow that notifies partner users when an opportunity is acted upon.	Application Composer

Modify Additional Partner Relationship Management Objects for Channel Sales

While the content in this section doesn't directly support the two business use cases discussed in this guide, if you plan to use additional partner relationship management objects to modify your channel sales capabilities, then you must use the BPM Worklist to modify the approval workflow so that requests go to the correct resource for approval for the following business objects:

- Deal registration
- Partner program enrollment
- MDF

Use Workspace to Improve Productivity

Workspace is a single, unified work area that improves searches and makes key information available, thus accelerating user productivity. Channel managers and partner users can now do all of their work in Workspace, instead of in individual work areas.

To make the Workspace UI available for users, you must enable it first, and then select the objects to enable in the Workspace UI and index for Adaptive Search. You can enable these Partner Relationship Management objects for Workspace:

- Deal registration
- Partner
- Partner contact

Note: Partner users (except for partner administrators) won't have access to partners and partner contacts in Workspace, but they can access leads and opportunities, for example, if enabled.

Once enabled, users can click the Previous and Next buttons on record detail pages to navigate through their partner, partner contact, and deal registration records in Workspace. This new navigation significantly reduces the time spent going back and forth between edit and list pages.

In addition, users can access partner and partner contact data within dynamic tabs, if you enable them in Workspace. Users can access top-level dynamic tabs that support nested dynamic tabs, letting them act on multiple records

simultaneously. See "Use Dynamic Tabs and Nested Dynamic Tabs" in the Related Topics for more information about how these tabs work.

For a complete list of all objects that you can enable for Workspace, see "Enable Workspace" in the Related Topics.

Related Topics

Configure Pages for Channel Sales

Modify Pages for Channel Sales

Setting up channel sales functionality involves modifying the user interface. By default, partner relationship management UIs are configured for the partner roles, however you must modify these UI pages for the channel roles.

For example, a common modification is adding a Partner column to an object's landing page so that the channel account manager knows which partner the record belongs to.

This topic provides some examples of what you may want to modify. Your unique business requirements, of course, will dictate what you actually change for partner pages.

Create a Sandbox

Before you can make changes to standard objects, you must create a sandbox. Use these steps to create your sandbox.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
 2. Click your user name and from the Settings and Actions menu, click **Manage Sandboxes**.
 3. Click the **New** icon (+) or from the Actions menu, select **New**.
 4. In the Sandbox Name field, type a name for your sandbox.
 5. Click **Save and Close**.
- You should see your sandbox displayed in the list of available sandboxes.
6. Select your sandbox from the list and click **Set as Active**.

Modify Pages

You can add or hide fields or field groups (regions) in the Partner pages. Depending on what you're trying to do, you can use either Page composer or Application Composer to make changes to the UI.

The following table lists some modification scenarios, including creating dynamic layouts, exposing fields for particular roles, and renaming fields. This table indicates which tool you should use for each scenario, and it provides example steps to accomplish each scenario.

Scenario	Tool	Example
You have fields or field groups on a create page or edit (details) page that always need to be exposed for a specific role. You can create Dynamic Layouts to accomplish this.	Application Composer	<ul style="list-style-type: none">• On the Edit Lead page, you can expose the Channel Manager field for users with partner roles only.• On the Create Lead page, you can expose the Partner field for channel users only.

Scenario	Tool	Example
You want to show one or more Partner Information region fields for specific roles when Sales Channel is set to Partner on a lead.	Page Composer	<ul style="list-style-type: none"> In the Create Lead page, you want to show the Partner and Sales Channel fields, but you want Partner to appear only when the Sales Channel is set to Partner. In the Edit Lead page, you want to show Sales Channel field and the Partner Information field group. However, the Partner Information field group should only appear when Sales Channel is set to Partner. <p>Instead of using Page Composer, you can also accomplish the same scenarios by using dynamic page layouts in Application Composer.</p>
You want to rename fields.	Application Composer	Change Primary Partner to Partner in the Leads pages.

The following table shows examples of fields you may want to expose, and alternate labels you can consider for the field names. Renaming fields is done in the object's Fields page in Application Composer, and exposing or hiding fields is done in the desired page layout in Application Composer for the same object, under the Pages node.

Default Field Name	Modified Display Label
Primary Partner	Partner
Partner Type	Type
Partner Program	Program
PartnerLevelMeaning	Tier
PartnerOwnerName	Channel Manager

The following is a high-level procedure for exposing fields:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From the Navigator, click **Application Composer** under the Tools category.
3. From the list of Standard objects, select the object you want.
 - o For Opportunities: Click **Standard Objects, Opportunity, Pages**.
 - o For Leads: Click **Standard Objects, Sales Leads, Pages**.
4. Edit any modified page layout for the desired type of page, such as the creation page or details (edit) page.
5. From the list of available fields, select the fields you want to expose and move them to the Selected Fields list
6. Click **Save and Close** to save your changes.

The following is a high-level procedure for renaming fields:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. Ensure you're in your sandbox. You should see a small banner showing the name of your sandbox displayed across the top of the page.
3. From the Navigator, click **Application Composer** under the Tools category.
4. In the Application Composer tree, navigate to the Fields area for the object you're modifying:
 - Leads: Click **Standard Objects: Sales Lead: Fields**.
 - Opportunities: Click **Standard Objects: Opportunity: Fields**.
5. Click the **Standard** tab.
6. For each field you want to rename, select the row, click the **Edit** icon, and under Appearance, edit the **Display Label**.
7. Save your changes.

Modify the Landing Page

You can modify the partner landing page table fields and columns for specific partner roles. You can use Page Composer or Application Composer, depending on whether or not the fields are already preconfigured for the landing page table.

To modify page layouts in Application Composer, navigate to **Standard Objects: Sales Lead: Pages**.

The following table provides example field modifications you can make to the Partner landing page, including exposing hidden fields and table columns by using Application Composer and Page Composer. This table also indicates which tool to use for each scenario, and it provides example steps to accomplish each scenario.

Scenario	Tool	Example
Expose any hidden fields or columns that are available for selection in Page Composer in the landing page lists (summary table) for a specific role.	Page Composer	Add the Partner column to the Leads list page for channel user roles only.
Begin the process of adding any hidden fields or columns you want to expose in the landing page lists for specific roles, if the fields aren't available for selection in Page Composer.	Application Composer	<ul style="list-style-type: none"> Expose the Source and Accepted Date columns in the Leads list table in the Leads landing page. You must first add them to the Leads list table and then use Page Composer to add them as fields to the table. Add the Partner column to the Opportunities list table in the Opportunities landing page. You must first add them to the Opportunities list table and then use Page Composer to add them as fields to the table.
Complete the process of adding any hidden fields or columns you want to show in the landing page lists for specific roles, if the fields aren't available for selection in Page Composer.	Page Composer	<ul style="list-style-type: none"> You have exposed the Source and Accepted Date columns in the Sales Lead table, but you don't want them exposed for any users except regular partner end users. You must modify the landing page table layout in Page Composer for every job role that you don't want to expose the Source

Scenario	Tool	Example
		and Accepted Date columns. In other words, for all nonpartner roles, deselect these two columns on the Leads landing page table. (Note that deselecting these fields at the Site layer in Page Composer will make them unavailable at the Job Role layer, even if you have added them in Application Composer.)

Configure Default Search on Standard Subtabs for Partners

You can add default search criteria to standard subtabs for partners so that your channel managers can more easily find the subtab data that's relevant to their daily activities.

When a user opens the subtab at runtime, the records displayed are automatically filtered using the search criteria you added. Users can change the default search value, but they can't change the default search field. They can, however, further refine their search by adding additional search fields and values at runtime.

Adding a default search filter to a subtab is optional. If you skip this step, then no search fields are automatically added to the subtab, but users can still see the search region and perform their desired search.

Use this procedure to add a default search filter field, operator, and value for the Leads subtab search on the Edit Partner page.

Note: When adding a default search filter to standard subtabs, the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on a Partner details page layout. This means that the same search filter is added to the Lead subtab on an Opportunity details page layout.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **Partner**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the **Subtabs Region**, highlight **Leads** and click the pencil icon.
9. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
10. Select one default search filter to apply to the Leads subtab.

You can select from a list of both standard and custom Lead fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if this is a subtab that was added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab table.

For example, you want to create a search filter to search for all qualified leads for a partner. Select **Status** from the drop-down list and select **Equals** as the operator and then select the Qualified check box.

11. Click **Done** and ensure that the layout status for your Leads subtab layout is set to Active.
12. Test the changes: Navigate to **Sales > Partner Management > Partners** as a user with access to the partner pages, for example, as a channel manager. Edit a partner and confirm that the data that displays on the Leads subtab includes only qualified leads.
13. Publish the sandbox.

Related Topics

- [Overview of Subtabs](#)

Create Saved Searches for Specific Roles

You can create your own saved searches (also called saved lists) for specific roles.

For example, you can create a saved search for all users with the Partner Sales Representative role using criteria that these users would typically need, and another one for users with the Channel Sales Manager role using the criteria that they would typically need.

You use Page Composer to create the saved searches.

Related Topics

Set Up Partner Channel Sales in Leads

To fully use partner relationship management for channel sales execution in leads, you must perform several configuration procedures. Some of these procedures may include:

- Modifying page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields
- Enabling your partner users to convert leads to opportunities
- Creating assessment templates used to qualify leads
- Validating default assignment type used
- Defining assignment rules if you select rule-based mode.

The exact tasks depend upon your unique business requirements.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant.

Modify Page Layout for Leads

Following is a sample procedure for modifying the layout of the Leads pages for different user types.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. Navigate to Lead pages: Select **Standard Objects, Sales Lead**, and then click **Pages**.

3. Ensure that the **Simplified Pages** tab is active.
4. In the **Creation Page Layouts** section, edit any modified layout. If none exists, then duplicate the standard layout and edit the resulting modified layout.
5. Edit the **Fuse Lead Create** page region. Make the following changes to the layout:
 - o Add the field, **PartnerOwnerName**. (You will rename this field to Channel Manager later.)
 - o Reorder the fields so that **Attachments** is before **Status**.
6. Save your changes.
7. Associate the layout with the appropriate user roles. Select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - o Partner Administrator
 - o Partner Sales Manager
 - o Partner Sales Representative
8. Next, create a modified layout for the Edit Lead page. Ensure you're in the **Simplified Pages** tab. In the **Details Page Layouts** section, edit any user-defined layout. If none exists, then duplicate the standard layout and edit the resulting copy of the layout.
9. In the Summary subtab, edit the **Summary** region.
10. Make the following changes:
 - o Add the field **PartnerOwnerName**. (You will rename this field to Channel Manager later.)
 - o Reorder the fields so that **Attachments** is before **Status**.
11. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - o Partner Administrator
 - o Partner Sales Manager
 - o Partner Sales Representative
12. Make sure the new layout comes before the Standard Layout in the table.
13. Test your changes by signing in as a user with one of the roles you associated with the layout.
14. Publish the sandbox.

To modify the layout for channel account manager and channel sales manager:

1. Make a copy of the appropriate layouts you created or modified earlier and:
 - o Remove **PartnerOwnerName** in the Summary region.
 - o In the Sales Team subtab, add the **Organization** field to the Summary Table and move it directly after Team Member.
2. Make sure the new layout comes before the Standard Layout in the table but after the partner user layout.

Rename Field Labels

You can rename field names from their default values to new values, as needed.

1. In Application Composer, navigate to **Sales: Standard Objects: Sales Lead: Fields**.
 - a. Click the **Standard** tab.
 - b. For each field to be renamed, select the row, and click **Edit the Selected Field**.
 - c. Under **Appearance**, edit the display labels. Following is a sample of the fields you may want to change.

The following table shows some field names that you can rename for leads in channel sales, including PartnerLevelMeaning, PartnerOwnerName, and Primary Partner. This table also indicates modified display labels for those fields, including Partner Level, Channel Manager, and Partner.

Default Field Name	Modified Display Label
PartnerLevelMeaning	Partner Level
PartnerOwnerName	Channel Manager
Primary Partner	Partner

- d. Save your changes.

Additional Modifications in Page Composer

You may want to make additional changes in Page Composer for the Sales Lead object. This section presents some example modifications you would make for both channel and partner salesperson roles.

For Partner Sales Representative, Partner Sales Manager, and Partner Administrator roles:

- Modify the Leads landing page table layout by reordering, removing, or adding columns.

For the channel account manager and channel sales manager:

- Add the Partner column.
- Move the Age in Days column to the right of the Name column.

For partners:

- Add the Source and Accepted Date columns.

Create Saved Searches

You may want to your own saved searches for partner users. This section presents some example modifications you would make the both channel and partner salesperson roles.

To find opportunities for Channel Account Manager: "Opportunities where I am on the team" should be default.

To find leads for the Channel Account Manager, expose the following fields in the search:

- Pending Distribution
- Pending Acceptance
- Accepted Partner Leads

To find leads for partners, expose the following fields in the search:

- Brand Owner Assigned Leads
- My Open Accepted Leads

- All Accepted Leads

Enable Partner Users to Convert Leads to Opportunities

Depending on your company policy, you can configure custom partner roles to enable your partner users (and not just channel managers) to convert leads to opportunities. To do this, complete these steps:

1. Navigate to the Security Console and click the Roles tab.
2. Find the custom partner role that you want to modify, and click **Edit Role**.
3. On the Function Security Policies page, on the Privileges tab, click **Add Function Security Policy**.
4. Search for **Convert Sales Lead** and click **Add Privilege to Role**.
5. On the Data Security Policies page, click **Create Data Security Policy** and enter these values.

Data Security Policy Field	Value
Policy Name	Custom Grant on Sales Lead
Start Date and End Date	Enter your desired dates.
Database Resource	Sales Lead
Policy Description and Condition Names	See table below.
Data Set	Select by instance set
Actions	Convert Sales Lead

For policy descriptions and condition names, review the ones listed below and pick the ones you need.

Policy Description	Condition Name
Custom Partner sales representative can convert sales lead where they're the owner of the sales lead	Access the sales lead for table MKL_LM_LEADS where they're the owner of the sales lead
Custom Partner sales representative can convert sales lead where they're an administrator of the resource organization in the primary assignment of the owner	Access the sales lead for table MKL_LM_LEADS where they're an administrator of the resource organization in the primary assignment of the owner

Policy Description	Condition Name
Custom Partner sales representative can convert sales lead where they're a resource in the territory assigned to the sales lead	Access the sales lead for table MKL_LM_LEADS where they're a resource in the territory assigned to the sales lead
Custom Partner sales representative can convert sales lead where they're a resource in the lead sales team with full access	Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team with full access
Custom Partner sales representative can convert sales lead where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team	Access the sales lead for table MKL_LM_LEADS where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team

6. Navigate to the summary step and confirm that you can see the new function security policy and any new data security policies that you added.
7. Click **Save and Close**.
8. Confirm that these two ESS jobs are scheduled to run:
 - Import User and Role Application Security Data
 - Retrieve Latest LDAP Changes
9. Confirm that the Convert action is available in the Edit Lead page layout that's active for the custom partner role. You can check this in Application Composer.

To test your changes, sign back in as a partner user to try to convert a lead to an opportunity.

Additional Setup Steps

Additional setup steps may be required, depending on your business needs, as described below. To perform these setup steps, sign in to the Setup and Maintenance work area as a user with Application Implementation Consultant or Sales Administrator role. Use the Lead Management offering, with Sales Leads as your functional area.

The following table shows the task names and the specific changes to make for each task to configure leads for channel and partner roles. These tasks include creating assessment templates, configuring profile options for the assessment templates and copy map, and configuring assignment rules.

Task Name	What You Need To Do
Create assessment templates and set profile option for assessment templates	<p>Create assessment templates: Manage Sales Lead Assessment Template</p> <p>Set the following profile option: Advanced Lead Qualification Enabled - Indirect Leads. Specify the default sales lead assessment template to be used in lead qualification for leads with the Sales Channel set to Partner. The default value is blank.</p>

Task Name	What You Need To Do
Set copy map profile options	Profile display name: Partner Lead to Opportunity Mapping Change this value if you have customer-defined field mapping for partner lead conversion that differs from the default mapping. This applies for both partner and direct sales leads. The default value is Copy Lead To Opportunity Map.
Manage lead assignment rules	Ensure that automated lead assignment to partners is set up. If using territory-based assignment, you must set up Partner territories and Channel Sales Manager territories. See the territories topics for more information on territories setup.

Set Up Channel Sales in Opportunities

To fully use partner relationship management for channel sales execution in opportunities, you must perform several configuration procedures. These procedures include:

- Modifying page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields
- Creating assessment templates
- Validating default assignment type used
- Defining assignment rules
- Setting up channel territories
- Define the opportunity sales method using the Define Sales Methods task.

The exact tasks depend upon your unique business requirements.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on modifying the applications, see the Oracle Applications Cloud Configuring Applications Using Application Composer guide.

Modify Page Layout for Partner Users

Following is a sample procedure for creating your own layout for the opportunity details page for partner users, such as Partner Sales Representative and Partner Sales Manager.

1. With a sandbox active, navigate to Application Composer: **Navigators, Tools, Application Composer**.
2. Navigate to opportunity pages: Select **Standard Objects, Opportunities**, and then click **Pages**.
3. Ensure that the **Simplified Pages** tab is active.
4. In the **Details Page Layouts** section, make a copy of the Standard Layout. Name the copy something meaningful, like Partner User Layout.
5. Edit the layout.
6. Make following changes to the layout:
 - In the Summary subtab, edit the Summary region. Add the **Channel Manager** field.

- In the Summary subtab, edit the Summary region. Add the **Registered** field.
- In the Summary subtab, edit the Revenue Table. Add the **Discount** field.
- 7. Save your changes and click **Done**.
- 8. Next, associate the partner layout with the appropriate user roles. In the **Details Page Layouts** region, select the partner user layout and click the **Role** list of values to associate the following roles with the layout:
 - Partner Administrator
 - Partner Sales Manager
 - Partner Sales Representative
- 9. Test your changes by signing in as a user with one of the roles you associated with the layout.
- 10. Publish the sandbox.

Modify Page Layout for Channel Account Managers

Following is a sample procedure for creating your own layout for the opportunity details page for users with the Channel Account Manager role.

1. With a sandbox active, navigate to Application Composer: **Navigators, Tools, Application Composer**.
2. Navigate to opportunity pages: Select **Standard Objects, Opportunity**, and then click **Pages**.
3. Ensure that the **Simplified Pages** tab is active.
4. In the **Details Page Layouts** section, make a copy of the Standard Layout. Name it something meaningful, such as Channel Manager Layout.
5. Edit the layout.
6. Make following changes to the layout:
 - In the landing page, add the Partner column to the table.
 - In the Summary subtab, edit the Revenue Table. Add the **Discount** field.
7. Save your changes.
8. Next, associate the channel manager layout with the appropriate user roles. In the Details Page Layouts region, select the channel manager layout and click the **Role** list of values to associate the following roles with the layout:
 - Channel Account Manager
 - Channel Sales Manager
9. Test your changes by signing in as a user with one of the roles you associated with the layout.
10. Publish the sandbox.

Note: Without UI modification, users with the Channel Account Manager and Channel Sales Manager roles can already see the Primary Partner field in the opportunity details page, as well as the Partners subtab. These are implemented using security privileges.

Additional Setup Steps

Additional setup steps may be required, depending on your business needs, as described below. To perform these setup steps, sign in to the Setup and Maintenance work area as a user with Application Implementation Consultant or Sales Administrator role. Use the Sales offering, with Opportunity Management as your functional area.

The following table shows additional setup steps to configure opportunities for channel sales, including creating and activating assessment templates with the Manage Opportunity Assessment Templates task, and configuring partner team resource access levels and functions by using the Manage Opportunity Profile Options task to verify the values

of the Partner Resource Sales Team Access Level Default and Partner Resource Sales Team Function Default profile options.

Setup Step	Details
Create and activate assessment templates	<p>Task Name: Manage Opportunity Assessment Templates</p> <p>See the assessment topics for more information.</p>
Configure partner team resource access level and function	<p>Task Name: Manage Opportunity Profile Options</p> <p>Verify the values for the following profile options:</p> <ul style="list-style-type: none"> Partner Resource Sales Team Access Level Default (MOO_DEFAULT_PARTNER_ACCESS_LEVEL): Default access level for partner resources added to the opportunity team. The default is No Access. Partner Resource Sales Team Function Default (MOO_DEFAULT_PARTNER_TEAM_MEMBER_FUNCTION): Default function for partner resources added to the opportunity sales team. The default value is Integrator. <p>Ensure that automated opportunity assignment for partners is set up. If using territory-based assignment, you must set up Channel Sales Manager territories. See the territories topics for more information on territories setup.</p>

Configure 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.

Roles	Actions
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 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	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. 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.
All roles	Mark a deal registration as their favorite.

Deal Registration Setup

To configure deal registrations for use with Partner Relationship Management, you must perform several configuration procedures. Some of these procedures may include:

- Modifying page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields
- Reviewing the setting for the All Partner Contacts in Partner SOAP Service Enabled profile option

The exact tasks depend upon your unique business requirements.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on modifying the applications, see the Extending Sales guide.

Modify Page Layout for Deal Registrations

Following is a sample procedure for creating your own layouts for the Deal Registrations pages for different user types.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. Navigate to Deal Registration pages: Select **Standard Objects**, Deal Registrations, and then click **Pages**.
3. Ensure that the **Simplified Pages** tab is active.
4. In the **Creation Page Layouts** section, edit any user-defined layout. If none exists, then duplicate the standard layout and edit the resulting copy of the layout.
5. Edit the **Fuse Deal Create** page. Add the following fields:
 - Partner
 - Partner Level
 - Partner Type
6. Save your changes.
7. Associate the layout with the appropriate user roles. In the Creation Page Layouts section, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Channel Account Manager
 - Channel Operations Manager
 - Channel Sales Manager
8. Next, create your own layout for the Edit Deal Registrations page. Ensure that you're in the **Simplified Pages** tab. In the **Details Page Layouts** section, edit any user-defined layout. If none exists, then duplicate the standard layout and edit the resulting copy of the layout.
9. In the Summary subtab, edit the **Summary** region.
10. Add the following roles:
 - Partner
 - Partner Level
 - Partner Type
11. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Channel Account Manager
 - Channel Operations Manager
 - Channel Sales Manager
12. Make sure the new layout is above the Standard Layout in the table.
13. Test your changes by signing in as a user with one of the roles you associated with the layout.
14. Publish the sandbox.

To modify the layout for channel account manager and channel sales manager:

1. Make a copy of the appropriate layouts you created or modified above and:

- o Remove **PartnerOwnerName** in the Summary region.
 - o In the Sales Team subtab, add the **Organization** field to the Summary Table and move it directly below Team Member.
2. Make sure the new layout is above the Standard Layout in the table but below the partner user layout.

Rename Field Labels

You can rename field names from their default values to new values, as needed.

1. In Application Composer, navigate to **Standard Objects: Deal Registrations: Fields**.
 - a. Click the **Standard** tab.
 - b. For each field to be renamed, select the row, and click **Edit the Selected Field**.
 - c. Under **Appearance**, edit the display labels. Following is a sample of the fields you may want to change.

The following table shows the default field names for deal registrations, including PartnerLevelMeaning, PartnerOwnerName, and Primary Partner. The table also shows the modified display names for each field, including Partner Level, Channel Manager, and Partner.

Default Field Name	Modified Display Label
PartnerLevelMeaning	Partner Level
PartnerOwnerName	Channel Manager
Primary Partner	Partner

- d. Save your changes.

Review the Deal Registration-Related Profile Option

When a partner has more than 500 contacts, submission of deal registrations for that partner might not complete successfully.

If it's possible that your partners could have more than 500 contacts, then set the All Partner Contacts in Partner SOAP Service Enabled profile option (ZPM_ENABLE_ALL_PARTNER_CONTACTS_IN_SOAP) to **No** to ensure that deal registration submissions are successful. This means that SOAP web services will return only the preferred contact for the partner, not all 500+ partner contacts.

By default, this profile option is set to **Yes**.

Set Up Deal Registration for Channel Sales

Deal registration is a process by which partners request exclusive rights to an opportunity from the channel organization. It provides partners with the means to inform the channel organization about a potential opportunity, and then receive priority for that opportunity.

Partners can register deals using their access to the channel organization's applications. These deals are routed to designated channel account managers for approval. In turn, channel account managers can reject or return deal registration requests to partners, asking for additional information or justification. Before approving deals, channel account managers can check for duplicate opportunities to avoid channel conflicts. Once a deal registration is approved, an opportunity is automatically created to track the deal as it progresses through the pipeline.

Note: If you want to use the preconfigured deal registration flow, the only task you must perform is to add an approver's name to the default approver profile option `MKL_DEFAULT_DEAL_REGISTRATION_APPROVER`.

Preconfigured workflows are included for deal registration; however, to optimize deal registration for a channel sales environment, you can modify the relevant fields and pages for the applicable roles using Application Composer and Page Composer.

As well, activity management pages are optimized for direct sales. You can modify the activities pages to show deal registration attributes for indirect sales which have deal registration programs.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on modifying the applications, see the Oracle Applications Cloud Configuring Applications Using Application Composer guide.

Preconfigured Deal Registration Flow

The preconfigured deal registration process flow goes through the following steps:

1. Assignment adds team members and potential approvers to the deal team.
By default, assignment rules for deal registration are not included.
2. If no approver is identified or if the approver can't be identified on the team, the deal registration is routed to the default approver. The default approver is also identified by the profile option `MKL_DEFAULT_DEAL_REGISTRATION_APPROVER`.
3. The deal object is retrieved and sent to the human task.
4. The human task uses rules to determine approvers for the deal and then sends notifications.
5. The approvers then either approve, reject, or return the deal.
6. When a deal is approved, the deal is converted to an opportunity based on the copy map profile option `MKL_DEAL_TO_OPTY_MAPPING_NAME`.

Set Up the Preconfigured Deal Registration Workflow

Sales administrators and application implementation consultants must perform the following tasks to set up the preconfigured deal registration workflow:

1. Assign the preconfigured deal registration duty roles to the appropriate resources.
2. Configure your assignment rules.
3. Assign the preconfigured approver profile option to the appropriate deal registration approvers.

The following table provides the profile option names and codes, a description and preconfigured value for each profile option necessary for deal registration.

Profile Option Name and Code	Description	Preconfigured Value
Deal Registration Assignment Mode MKL_DEAL_DEFAULT_ASGN_MODE	This profile option determines if the default assignment mode is rule-based, territory-based, or both.	Rules-based Assignment Only/ORA_RBA
Resource Sales Team Access Level Default for Deal Registration MKL_DEAL_DEFAULT_SALES_TEAM_ACCESS_LEVEL	<p>This profile option determines the default access level that's granted to a resource added to the deal registration team. This can be changed later by people who have Full Access to the deal.</p> <p>The following values represent the access levels for resources added to the deal registration team:</p> <ul style="list-style-type: none"> • 100 - View only access • 200 - Edit access • 300 - Full access 	200
Assignment Rule for Rule-Based Deal Assignment MKL_DEAL_RBA_RULESETGROUP	This is the profile option you use with rule-based deal assignment.	NULL
Deal Registration Query Default Number of Days MKL_DEAL_SEARCH_LAST_UPDATED_RANGE_DEFAULT	This profile option determines the start and end dates for the Last Update Date search fields in Deal Registration Search UI.	90
Assignment Rule for Territory-Based Deal Assignment MKL_DEAL_TBA_RULESETGROUP	This is the profile option you use with territory-based deal assignment.	NULL
Deal Registration to Opportunity Mapping MKL_DEAL_TO_OPTY_MAPPING_NAME	This profile option is the name of the copy map used to convert a deal to an opportunity.	Copy Deal Registration To Opportunity Map
Use Default Deal Registration Approval Business Process MKL_DEAL_USE_DEFAULT_APPROVAL_PROC	This profile option determines if you will use the preconfigured deal registration business process flow, MklDealsApprovalProcess. Set this to No only if you're using a modified business process flow.	Yes
Deal Registration Default Approver MKL_DEFAULT_DEAL_REGISTRATION_APPROVER	This profile option contains the user name of a person to use as the default approver if the Human Task rules don't identify an approver.	NULL
Corporate Currency Default ZCA_COMMON_CORPORATE_CURRENCY	This profile option controls the type of currency you use in your organization	USD

Profile Option Name and Code	Description	Preconfigured Value
Exchange Rate Type Default ZCA_COMMON_RATE_TYPE	This profile option determines the exchange rate type you use in your organization.	Corporate
All Partner Contacts in Partner SOAP Service Enabled ZPM_ENABLE_ALL_PARTNER_CONTACTS_IN_SOAP	<p>This profile option determines if all partner contacts, or only the preferred contact, is returned for a partner by SOAP web services.</p> <p>To ensure that the deal registration submission is successful, set this profile option to No if you expect your partners to have more than 500 contacts.</p>	Yes

Set Up an Optimized Deal Registration Workflow

Sales administrators and application implementation consultants can optimize the deal registration approval and notification workflow to ensure a more robust integration of deal registration functionality. Sales administrators and implementation consultants must perform the following tasks to set up an optimized deal registration workflow for partner channel sales:

1. Import or create your partner users, create partner deal teams as appropriate for your business needs, and define partner owners (this task isn't specific to deal registration, but it's required for deal registration to function properly).
2. Define the deal registration assignment rules. There are two types of assignment profile options, rule-based and territory-based. The recommended approach is to use rule-based assignment for deal registration. You designate approvers for each partner deal team you have and assign the deal registrations to the partner on the deal team designated as owner. The rest of the team can also see the deal registration.
3. Define partner deal approvers within each partner deal team. There are preconfigured approval rules, however the recommended approach is to define rules that select the members from the team as approvers. If you want to have multiple approvers, then you must add each approver to the partner deal team as a part of assignment first.
4. Configure notifications for deal registration.
5. In Application Composer, configure dynamic page layouts for the channel account manager, partners, and approvers.
6. Add Reject and Return reason code lookups.
7. Identify duplicate opportunities.
8. In Application Composer, define the Copy Map for the deal to opportunity conversion.

Publish your sandbox.

Note: For more information on Approval Management, see the Approval Management chapter of the Implementing Applications guide.

Related Topics

- [Assign Channel Sales Manager Territories to Deal Registrations](#)

6 Create Partners

Create Partner Accounts and Partner Contacts for Channel Sales

This topic explains how you can create your partner accounts and partner contacts (partner sales users).

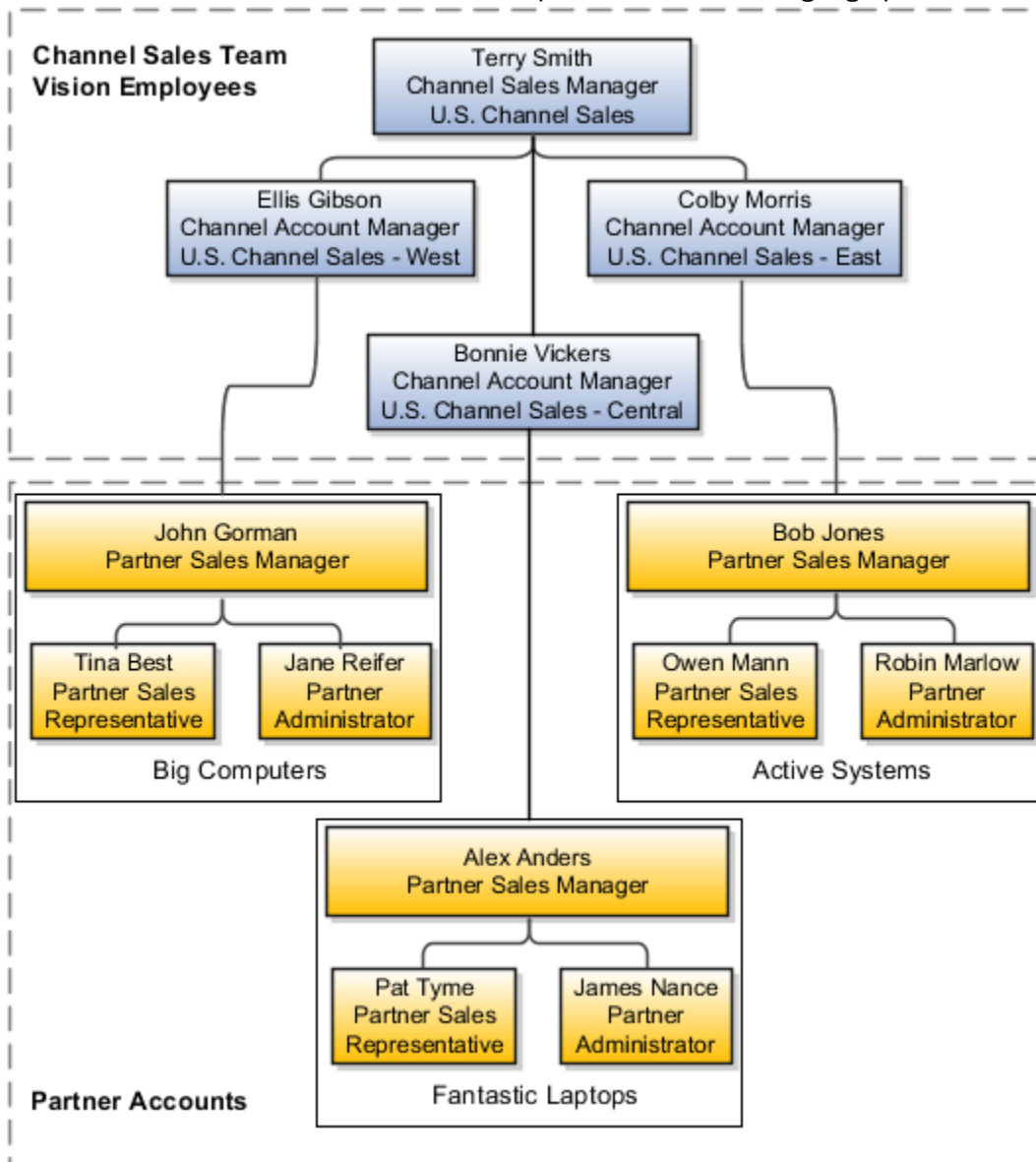
There are three ways to create partner accounts and partner contacts.

- You can create them manually in the UI.
- You can import them using import management.
- You can create them using the set of REST APIs that Oracle provides. For more information, see the Partners and Partner Contacts REST endpoints in the REST API for CX Sales and Fusion Service guide.

Your channel sales team consists of internal employees. Your partner accounts and partner contacts, meanwhile, are all external to your company. To support our business use cases, we need to create three partner accounts. The following figure shows how the three partner accounts exist outside the organizational hierarchy of Vision Corp.

This figure shows the channel sales team, which includes a Channel Sales Manager and three Channel Account Managers (one for each of the three geographical channel sales territories, East, Central, and West). The figure also shows the partner user team, which includes a Partner Sales Manager, a

Partner administrator, and a Partner Sales Representative, for each geographic channel sales territory.



Once you create partner accounts, you can mark partners as favorites from the Edit Partner page.

Create the Active Systems Partner Account in the UI

Since we are only creating one partner account to support the two business use cases, we can manually perform this procedure in the UI.

Use these steps to manually create the Active Systems partner account in the UI.

1. Sign in with your channel manager credentials.
2. From the landing page, click **Partner Management**, and click **Partners**.
3. Click **Create Partner**.

4. Provide the following information for the partner:

The following table shows the information you must provide for the Active Systems partner account, including Active Systems as the Name, Systems Integrator as the Type, Gold as the Tier, Active as the Status, United States as the Country, 431 Folsom St. as the Address Line 1, San Francisco as the City, CA as the State, and 94105 as the Postal Code.

Field Name	What to Type or Select
Name	Type "Active Systems".
Type	Select "Systems Integrator".
Tier	Select "Gold".
Status	Select "Active".
Country	Select "United States".
Address Line 1	Type "431 Folsom St.".
City	Type "San Francisco".
State	Type "CA".
Postal Code	Type "94105".

5. You can create the primary contact for this partner account at the same time we create the account. The primary contact is the person assigned to the business object team when that business object is assigned to the Active Systems partner account. The application automatically assigns the Partner Administrator role to the primary contact, which you can later change if necessary. A partner account must have a primary contact assigned before you can activate the partner account, unless you set the Partner Contact Required for Active Partners profile option (ZPM_PARTNER_CONTACT_MANDATORY) to **No**.

To create the primary contact for Active Systems, click the **Create Primary Contact** check box.

The first partner contact is automatically made the head of hierarchy.

6. Provide the following information for the primary contact:

The following table shows the information you must provide for the Active Systems primary contact.

Field Name	What to Type
First Name	Type "Robin".

Field Name	What to Type
Last Name	Type "Marlow".
Job Title	Type "Partner Administrator".
Email	Type "robin.marlow@noreply.com".

7. Click **Save and Close**.

At this point, the status of the partner account is Prospective. Before you can activate the partner account, you must change the partner account status to Registered, and you must select or create a primary contact for the partner account.

Note: You can activate a partner account without a primary contact if you set the Partner Contact Required for Active Partners profile option (ZPM_PARTNER_CONTACT_MANDATORY) to **No**.

Create Partner Sales Users

When you create partner sales users, you not only provision the permissions they need to do their jobs, but you also build the organization chart for each partner resource organization. This means that you must set up not only the provisioning rules, but also the elements that the application uses to create the organizational hierarchy for each partner resource organization.

Each partner sales user must have:

- A partner resource role

You must assign a partner resource role, a name describing the role each partner resource plays in the organization, to each partner sales user you create. Partner resource roles display right underneath user names in the resource directory and elsewhere in the UI. They are also used as the primary condition in the role provisioning rules.

- A partner resource organization

You must create a partner resource organization for every partner sales user. Each partner sales user who's not a manager automatically inherits the manager's organization. The name of the partner resource organization need not be any formal department name, but you should avoid using partner manager names to accommodate hierarchy changes.

Note: You can't delete a partner account's primary contact if the contact is the root of the partner resource organization. Also, if you delete any other partner contact from the partner object level, you can't add it back to the partner even if the relationship is reactivated. You will need to recreate the partner contact.

The organization hierarchy of the partner account is based on the management hierarchy you specify when you create your partner sales users. You must enter a partner manager for each partner sales user you create.

What Oracle Provides for You

Oracle provides you with the standard partner resource roles and the role provisioning rules that automatically assign users with the job roles and abstract roles required to do their job.

The following partner resource roles supplied by Oracle trigger the automatic assignment of job and abstract roles:

- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

Note: For each of the partner resource roles provided by Oracle, there is a corresponding job role with the same name.

For example, when you create a partner sales manager with the provided Partner Sales Manager resource role, the application automatically provisions the Partner Sales Manager job role and the Resource abstract role.

The following table lists the partner role-provisioning rules provided by Oracle, the condition which triggers the provisioning, and the job and abstract roles the rule provisions. You can obtain a description of each job and abstract role from the Security Reference guide.

Note: If you're setting up a Global Single Instance environment, then Oracle doesn't provide these role-provisioning rules for you. You must create them manually.

The following table shows the provisioning rule name, condition, and job or abstract role provisioned for each partner resource role, including Partner Administrator, Partner Sales Manager, and Partner Sales Representative.

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned
Partner Administrator	Resource Role is Partner Administrator	Partner Administrator
Partner Sales Manager	Resource Role is Partner Sales Manager	Partner Sales Manager
Partner Sales Representative	Resource Role is Partner Sales Representative	Partner Sales Representative

Grant Data Security Privileges to Partner Administrators and Other Users You Created

The following data security privileges that permit users to edit their partner hierarchy are included:

- Add Parent Node
- Add Child Node
- Remove Node

By default, these data security privileges are included as part of the channel sales manager, channel operations manager, and channel account manager roles; however, they're not included with the partner administrator role. If you want your partner administrators or any other users you created to have edit level access to their partner hierarchy,

you must add these privileges to those user roles. You add these privileges using the standard data security privilege addition process as defined in the Implementing Sales guide.

Who Are We Creating?

To support the two previously mentioned business use cases, we will need to create several partner contacts or sales users for the Active Systems partner account.

The following table shows the partner sales users for Active Systems, their job title, and the name of the partner account they belong to, including Robin Marlow as the Partner Administrator, Bob Jones as the Partner Sales Manager, and Owen Mann as the Partner Sales Representative.

Partner Contact Name	Partner Job Role	Partner Account
Robin Marlow	Partner Administrator	Active Systems
Bob Jones	Partner Sales Manager	Active Systems
Owen Mann	Partner Sales Representative	Active Systems

Create the Partner Contacts for Active Systems in the UI

Since we are only creating a few partner contacts for Active Systems to support the two business use cases, we can manually perform this procedure in the UI.

Note: The partner account to which the partner contact belongs must be in Active status before you can see the Create User Account check box on the Manage User Details page.

Use these steps to manually create the partner contacts for the Active Systems partner account in the UI.

1. Sign in with your channel manager credentials.
2. From the landing page, click **Partner Management**, and click **Partners**.
3. From your list of partners search for and select **Active Systems**.
4. On the Edit Partner page, click the **Contacts** subtab.
5. On the Edit Partner Contacts page, click **Create Partner Contact**.
6. On the Create Partner Contact page, create the following contacts:
 - Owen Mann - Partner Sales Representative
 - Bob Jones - Partner Sales Manager
7. Click **Save and Continue** after you create each contact. Then click **Manage User Details** and provide the following additional information:
 - Role
 - Manager Name
 - User Name
8. Select the **Create User Account** check box.
9. Click **Save and Close**.

Once you create a partner contact, you can mark it as a favorite on the edit page.

Note: If your partners could have 500+ partner contacts, then set the All Partner Contacts in Partner SOAP Service Enabled profile option (ZPM_ENABLE_ALL_PARTNER_CONTACTS_IN_SOAP) to **No** to ensure that deal registration submissions are successful. This means that SOAP web services will return only the preferred contact for the partner, not all 500+ partner contacts. By default, this profile option is set to **Yes**.

Import Partner Accounts and Partner Contacts for Channel Sales

This topics explains the process on importing partner accounts and partner contacts. You import the partner accounts and partner contacts in separate files, first the partner accounts and then the partner contacts.

For more information about importing data, see the Understanding Import and Export Management for CX Sales and Fusion Service guide.

The following table provides an overview of the steps to import your partner accounts and their partner contacts, including registering your source system with the Manage Trading Community Source Systems task, exporting the party IDs of the partner users with the Schedule Export Processes task, downloading and editing the import template, and creating the import activity with the Manage File Import Activities and the Manage File Import Mappings tasks. You can open the different import tasks directly from the Import Partner Accounts and Contacts folder in the implementation project. Alternately, you can search for the tasks by name from the Setup and Maintenance work area.

Step	Description	Task Name
1	<p>Register the application that's the source of your import data. This one-time setup creates the code that you enter along with the different reference IDs in all of your import files.</p> <p>Oracle permits you to import data from multiple sources, so the reference IDs alone don't guarantee uniqueness.</p>	Manage Trading Community Source Systems
2	<p>Export the Party ID for the partner users you have created. You must use the Party IDs to identify the partner resource you want to be the account owner for each partner account you import.</p> <p>Partner account owners see the partner account in the list of My Accounts and are automatically members of the partner account team with privileges to add others. Partner account owners aren't assigned using sales territories, so they must be either imported or set manually by the application users themselves.</p>	Schedule Export Processes

Step	Description	Task Name
3	In the Manage File Import Mappings work area, search for "Partner" to find the seeded mapping templates for partner accounts. Download the appropriate template for your business needs.	Manage File Import Activities
4	Review the template and the values each column in your file requires for import. For example, the address data must match the geography reference data you imported earlier. Populate the template with your data and save it as a .csv file.	This task is done in your import file.
5	Optionally, you can add additional columns to the import file.	This task is done in your import file.
6	If you added columns to your file, then you must copy the seeded mapping and edit the copy to map them.	Manage File Import Mappings
7	Create an import activity to import the file.	Manage File Import Activities
8	Import partner contacts using the same steps. This time you're using the template you download from the Partner Contact Create and Update Seeded Mapping.	Manage File Import Mappings Manage File Import Activities

Download the Mapping Template

Oracle provides predefined mappings for each import object. You can download the template for the mapping. The template file includes a header row with the names of the attributes you map. The columns are arranged in the same order as the default mapping for the business object. The template columns are attributes the application uses to uniquely identify the data you import.

Use this procedure to download templates for importing data with file import.

1. Sign in as a setup user and open the **Manage File Import Mappings** task from the implementation project. Alternatively, setup and sales administrator users can search for the task by name in the Setup and Maintenance work area and open it from there.
2. From the Object list on the Manage File Import Mappings page, select the object you want to import. For example:
 - For importing partners, select Partner.
 - For importing partner contacts, select Partner contact.
3. Select the **Seeded** option.
4. Click **Search**.
5. Click the name link of the appropriate mapping.

The following table shows the preconfigured mapping templates available for partner and partner contact import, including the templates for importing new partners and partner contacts, importing partners with

hierarchy information, importing partners and their child objects, importing partners with both hierarchy and child object information, and updating existing partners.

Mapping Template Name	Description
Oracle Fusion Hierarchical File Import Map for Partner - Includes Child objects	Use this template to import multiple CSV files, including the child objects of the partner object, and you want the parent and child objects imported in a hierarchical order.
Oracle Fusion Hierarchical File Import Map for Partner	Use this template when you import multiple CSV files for the partner object and you want the objects imported in a hierarchical order.
Oracle Fusion File Import Map for Partner - Includes Child Objects	Use this template when you import a single CSV file that includes the partner object and the child objects of the partner object.
Oracle Fusion File Import Map for Partner Update	Use this template when you import a single CSV file to update information for existing partner account.
Oracle Fusion File Import Map for Partner	Use this template when you import a single CSV file for the partner object.
Oracle Fusion File Import Map for Partner Contact	Use this template when you import partner contacts.

6. Click **Download Template**.
7. Save the template to your desktop or local drive.

Import Partners and Partner Contacts With Import Management

Sales Administrators can use import management to create new partner accounts, to update existing partner accounts, and to add partner contacts (partner sales representatives) to these partner accounts. Several seeded mapping templates for mapping your source file data are included.

Follow these steps to use import management to import partner accounts and partner contacts (partner sales representatives) for partner accounts.

1. Sign in with your sales administrator credentials.
2. From the navigator, select **Setup and Maintenance**.
3. Select the **Sales** offering, then search for and select **Manage File Import Activities**.
4. On the Manage Import Activities page, click **Create**.
5. On the Create Import Activity page, type a name for the import and select **Partner** or **Partner contact** from the **Object** list.
6. Indicate where the mapping template you downloaded in the previous task is stored, and select it.
7. Select the **Header row included** option.
8. Click **Next**.
9. Map your fields as shown in the following tables:

Partner Create

The following table shows the mapping values to use when you're creating new partners with import management. The information in this table is also provided as example data in the preconfigured import mapping templates.

Column Header	Example Value	Object	Attribute
ORGANIZATION_NAME	PNRORG1_8-03-1217	PartnerInterface	OrganizationName
PARTY_USAGE_CODE	PARTNER	PartnerInterface	PartyUsageCode
OS	CSV	PartnerInterface	PartyOrigSystem
OSR	PNRORG1_8-03-1217	PartnerInterface	PartyOrigSystemReference
TREE_CODE	PNRORG1_8-03-1217	PartnerHierarchy	TreeCode The number of characters in the TreeCode value must not exceed 30.
COUNTRY	US	PrimaryAddress	Country
ADDRESS1	40968.6011140046 Satellite	PrimaryAddress	Address1
CITY	Chattanooga	PrimaryAddress	City
STATE	TN	PrimaryAddress	State
POSTAL_CODE	37401	PrimaryAddress	PostalCode
PHONE_AREA_CODE	958	PrimaryPhone	PhoneAreaCode
PHONE_COUNTRY_CODE	1	PrimaryPhone	PhoneCountryCode
PHONE_NUMBER	7818081	PrimaryPhone	PhoneNumber
ZPM_TREE_STRUCTURE	PARTNER_ORG_TREE_STRU	ImpPartnerP	TreeStructureCode
ZPM_TREE_CODE	PNRORG1_8-03-1217	ImpPartnerP	TreeCode

Column Header	Example Value	Object	Attribute
			The number of characters in the TreeCode value must not exceed 30.
ZPM_OS	CSV	ImpPartnerP	OrigSystem
ZPM_OSR	PNRORG1_8-03-1217	ImpPartnerP	OrigSystemReference
ZPM_STATUS	ACTIVE	ImpPartnerP	Status
ZPM_PUB_STATUS	APPROVED	ImpPartnerP	Public Status

Partner Update/Partner Import for Existing Partner Account

The following table shows the mapping values to use when you're updating information for existing partners with import management. The information in this table is also provided as example data in the preconfigured import mapping templates.

Column Header	Example Value	Object	Attribute
PARTY_ID	100100032154464	PartnerInterface	PartyId
PARTY_USAGE_CODE	PARTNER	PartnerInterface	PartyUsageCode
TREE_CODE	CDRM_143053	PartnerHierarchy	TreeCode The number of characters in the TreeCode value must not exceed 30.
ZPM_PARTYID	100100032154464	ImpPartnerP	PartyId
ZPM_STATUS	ACTIVE	ImpPartnerP	Status
ZPM_PUB_STATUS	APPROVED	ImpPartnerP	PublicStatus
ZPM_PARTNER_ACCOUNT_ID	300100005239330	ImpPartnerP	PartnerAccountId

Column Header	Example Value	Object	Attribute

Partner Import With Attributes or Child Objects You Created

The following table shows the mapping values to use when you're importing partners that have customer-defined attributes or customer-defined child objects with import management. The information in this table is also provided as example data in the preconfigured import mapping templates.

Column Header	Example Value	Object	Attribute
partner_datetime	2016-07-04T12:08:56.235-0700	ImpPartnerP	partner_datetime_c
partner_longtext	test	ImpPartnerP	partner_longtext_c
partner_chil	partner child import	Partner_child_import_cWBIT	RecordName
partner_child_text	test	Partner_child_import_cWBIT	partner_child_text_c
partner_child_company_number	BCOMPANY	Partner_child_import_cWBIT	COMPANY_NUMBER
partner_company_number	BCOMPANY	ImpPartnerP	CompanyNumber
partner_child_datetime	2016-07-04T12:08:56.235-0700	Partner_child_import_cWBIT	partner_chile_datetime_c

Your customer-defined child object name and customer-defined field attributes will be different than what's shown in the preceding table.

Create Partner Contacts

The following table shows the mapping values to use when you're importing partner contacts with import management. The information in this table is also provided as example data in the preconfigured import mapping templates.

Column Header	Example Value	Object	Attribute
Partner_RelationshipOS	CSV	Partner	RelOrigSystem
Partner_RelationshipOSR	tina.best@bigcomputers.com_relationship	Partner	RelOrigSystemReference

Column Header	Example Value	Object	Attribute
Partner_RelType	CONTACT	Partner	RelationshipType
Partner_RelCode	CONTACT_OF	Partner	RelationshipCode
Partner_OS	CSV	Partner	ObjOrigSystem
Partner_OSOR	tina.best123	Partner	ObjOrigSystemReference
PersonProfile_FirstName	Tina	PersonProfile	PersonFirstName
PersonProfile_LastName	Best	PersonProfile	PersonLastName
PersonProfile_OS	CSV	PersonProfile	PartyOrigSystem
PersonProfile_OSOR	tina.best@bigcomputers.com_ person	PersonProfile	PartyOrigSystemReference
Email_EmailOS	CSV	Email	CpOrigSystem
Email_EmailOSOR	tina.best@bigcomputers.com_ email	Email	CpOrigSystemReference
Email_RelOS	CSV	Email	RelOrigSystem
Email_RelOSOR	tina.best@bigcomputers.com_ relationship	Email	RelOrigSystemReference
Email_EmailAddress	tina.best@bigcomputers.com	Email	EmailAddress
Email_EmailPrimaryFlag	Y	Email	PrimaryFlag
Phone_OS	CSV	PrimaryPhone	CpOrigSystem
Phone_OSOR	tina.best@bigcomputers.com_ phone	PrimaryPhone	CpOrigSystemReference

Column Header	Example Value	Object	Attribute
Phone_RelOS	CSV	PrimaryPhone	RelOrigSystem
Phone_RelOSR	tina.best@bigcomputers.com_ relationship	PrimaryPhone	RelOrigSystemReference
PhoneLineType	GEN	PrimaryPhone	PhoneLineType
Phone_RawPhoneNumber	6505061234	PrimaryPhone	RawPhoneNumber
PrimaryAddress_AddrOS	CSV	PrimaryAddress	LocationOrigSystem
PrimaryAddress_AddrOSR	tina.best@bigcomputers.com_ address	PrimaryAddress	LocationOrigSystemReference
PrimaryAddress_RelOS	CSV	PrimaryAddress	RelOrigSystem
PrimaryAddress_RelOSR	tina.best@bigcomputers.com_ relationship	PrimaryAddress	RelOrigSystemReference
PrimaryAddress_Address1	1234 InnovationWay	PrimaryAddress	Address1
PrimaryAddress_City	San Mateo	PrimaryAddress	City
PrimaryAddress_State	CA	PrimaryAddress	State
PrimaryAddress_Country	US	PrimaryAddress	Country
PrimaryAddress_Zip	94401	PrimaryAddress	PostalCode
ResProfile_CreateUserAccount	Y	ResourceProfile	CreateUserAccount
ResProfile_RoleCode	PARTNER_SALES_ REPRESENTATIVE	ResourceProfile	RoleCode
ResProfile_RoleTypeCode	PARTNER	ResourceProfile	RoleTypeCode

Column Header	Example Value	Object	Attribute
ResOrg_ManagerOS	Not applicable	ResourceOrganizationMembersh	ManagerPartyOrigSystem
ResOrg_ManagerOSR	Not applicable	ResourceOrganizationMembersh	ManagerPartyOrigSysRef
ResOrg_OrganizationName	Big Computers	ResourceOrganizationMembersh	OrganizationName
ResOrg_OrganizationUsage	PARTNER_RESOURCE_ORG	ResourceOrganizationMembersh	OrganizationUsage
ResOrg_TreeCode	PNRORG1_05-02-1234	ResourceOrganizationMembersh	TreeCode The number of characters in the TreeCode value must not exceed 30.
ResOrg_ParentTreeCode	Not applicable	ResourceOrganizationMembersh	ParentTreeCode
ResOrg_RoleCode	PARTNER_SALES_REPRESENTATIVE	ResourceOrganizationMembersh	RoleCode
ResOrg_RoleTypeCode	Not applicable	ResourceOrganizationMembersh	RoleTypeCode
Job_PrimaryFlag	PARTNER	Job	PrimaryFlag

10. Click **Next**.

11. On the Create Schedule page, select **Immediate** from the **Schedule** list and click **Next** to start the activity immediately.

If you want to schedule the activity for a future date, select **Specific Date** from the **Schedule** list, and select a date from the **Start Date** calendar.

12. On the Review and Activate page, check the import details, file details, import options, and schedule for your import.

13. If all of the information is correct for your import, click **Activate**.

After the import activity successfully completes, the Status column on the Manage Import Activities page displays **Completed**.

7 Configure Data Migration for Channel Sales

Overview of Channel Sales Data Migration

After you set up your channel sales branch and configure the business objects you want to use for channel sales, you can move your legacy data over to Oracle.

You can move this data by either manually recreating the data, or by importing the data using import management. If you only have a few records for a particular business object, such as partner programs, you can opt to manually recreate the records. However, if you have a large volume of records for a particular business object, then you're better off using import management to move the records over.

The types of data you can migrate using import management include:

- Partner accounts
- Partner contacts
- Partner programs
- Partner program enrollments
- Partner business plans and objectives
- Partner leads
- Deal registrations
- Marketing Development Funds (MDF)

You will need to designate a primary partner contact for some of these business objects, therefore you should begin your data migration by first moving over any existing partner accounts and the partner contacts for those accounts.

For more information about importing data, see the Understanding Import and Export Management guide.

Deal Registrations Import for Channel Sales

Partners use deal registrations to request exclusive rights, preferred pricing, or additional support for a deal from the channel organization.

Deal registrations permit partners to inform their channel organization about a deal and by being the first to do so, the partner receives priority for the deal. If you have existing deal registrations in your legacy system, you can either manually recreate them, or you can use the import management process to migrate these records. You can use import management to create new deal registrations or to update existing deal registrations.

Deal registration import involves following target objects:

- DealRegProduct, the product or products associated with the deal registration
- DealRegResource, the internal or external participants involved with the deal registration
- DealRegistration, the actual deal registration

Note: You can import deal registration products or resources that are associated to deals by using a .zip file containing CSVs for both the deal registration and the deal registration products or resources. However, if you plan to import deal registrations separately, you must either manually create or import the products and resources associated with the deal registrations before you submit the deal registration import activity.

Download the Mapping Templates for Deal Registration Import

Use these steps to download the mapping templates for the deal registration target import objects:

1. Sign in with your sales administrator credentials.
2. From the Navigator, select **Setup and Maintenance**.
3. In Setup and Maintenance, select the **Sales** offering.
4. Search for and select **Manage File Import Mappings**.
5. On the Manage file Import Mappings page, click **DEAL_REGISTRATION** and click **Download Template**.
6. Save the downloaded file to your local drive.

This file contains the mapping templates for the three deal registration target import objects. To import your existing deal registration data from your legacy system, you must populate these templates with the appropriate deal registration information from your legacy system.

Deal Registration Products Mapping

The only required import attribute for deal registration product import is DealProductNumber, however you also may want to map the following attributes:

The following table shows additional attribute to attribute name mappings for deal registration products.

Attribute	Attribute Name
Deal	DealNumber or DealId
Deal Product	DealProductNumber or DealProdId
Product Item	InventoryItemId or ItemNumber
Product Group	ProductGroupId or ProdGroupInternalName
Product Organization	InvOrgId or InvOrgCode

Deal Registration Resources Mapping

The only required import attribute for deal registration resource import is DealResourceNumber, however you also may want to map the following attributes:

The following table shows additional attribute to attribute name mappings for deal registration resources.

Attribute	Attribute Name
Deal	DealNumber or DealId
Deal Resource	DealResourceId or DealResourceNumber
Resource Party	ResourcePartyId or ResourcePartyNumber or ResourcePartyOrigSys/ResourcePartyOrigSysRef
Partner Organization	PartnerOrgOrigSys and PartnerOrgOrigSysRef or PartnerOrgId
Member Function	MemberFunctionCode

Deal Registrations Mapping

The only required import attribute for deal registration import is DealNumber, however you also may want to map the following attributes:

The following table shows additional attribute to attribute name mappings for deal registrations.

Attribute	Attribute Name
Deal	DealNumber or DealId
Owner	OwnerId
Partner	PartnerNumber or PartnerId or both PartnerOrigSys and PartnerOrigSysRef
Type	DealType
Status	DealStatus
Opportunity	OptyNumber or OptyId
Lead	LeadNumber or LeadId
Resource	ResourceOrigSys and ResourceOrigSysRef or ResourceNumber

Import Deal Registrations

Use these steps to import deal registration products, deal registration resources, and deal registrations.

1. Sign in with your sales administrator credentials.
2. From Navigator, click **Setup and Maintenance**.
3. Search for and select the **Manage File Import Activities** task.

4. On the Manage File Import Objects page, click **Create**.
5. In the Name field on the Create Import Activity page, type a name for your deal registration import activity.
6. Indicate where you stored the import mapping template.
7. Select the **Header row included** option.
8. Click **Next**.
9. Ensure the Select Import Mapping page, reflects the correct mapping for your selected import mapping template, and click **Next**.
10. On the Create Schedule page, select **Immediate** from the Schedule list, and click **Next**.
11. On the Review and Activate page, click **Activate**.

8 Set Up Sales Territories and Assignment for Channel Sales

Territories, Assignment, and Channel Sales

Assuming that you have already configured your sales applications for direct sales and now you want to add a channel sales branch to your direct sales organization, this section won't go into great detail about territories and assignment.

Instead, this section provides a brief explanation of territories and assignment, the territory types used in channel sales, the type or types of assignment allowed for each channel sales object, and what the high-level process is to configure territories and assignment for channel sales.

For more detailed information about territories and assignment, see the following guides:

- Getting Started with Your Implementation guide
- Implementing Sales guide

What are Territories?

Territories define the jurisdiction that channel managers have over their partner accounts, partner sales representatives, and their associated transactions. Territories provide the rules for automatically assigning channel sales users to partner accounts, leads, deal registrations, and opportunities. The territory hierarchy defines resource responsibilities and controls access to your sales data.

What Territory Types Does Channel Sales Use?

Channel sales utilizes two territory types:

- **Partner territory:** A Partner territory is for a specific partner. Partner territories define what the partner is authorized to sell and to what segment of the customer market. With partner territories, the territory type is Partner and there is a 1-to-1 relationship between partners and partner territories, so a partner organization has only one partner territory.
- **Channel Sales Manager territory:** Sales channel territories are for the (internal) channel sales team. With sales channel territories, the territory type is Channel Sales Manager. The owner and members of the territories get access to the object. Depending on the object, these members can have more than view access.

The following coverage models define channel sales manager type territories:

- **Sales Account-Centric:** This coverage type is defined by using the characteristics of the sales account, and specific inclusions and exclusions. For example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California.
- **Partner-Centric:** This coverage type is defined by the following characteristics or attributes of the partner organization:
 - Primary geographical location of the partner.
 - Organization Type of the partner (for example, private, public, government owned, nonprofit).
 - Size of the partner organization.

- Three auxiliary dimensions are available for partners based on the customer categories classification model.
- Individually Selected Partners. Select partners to directly assign to or exclude from a partner-centric territory. For example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

Partner account assignment and opportunity revenue line assignment matches against partner-centric territories first and then against sales account-centric territories, while lead, and deal registration territory based assignment matches against Channel Sales Manager territories with "Sales Account" coverage.

What are Dimensions?

Dimensions are attributes that define the jurisdictional boundaries of territories. For example, you can use the geography dimension to define territories by country, state, or postal code. Every partner that falls within the defined geography is assigned to the territory and to the channel sales team for that territory. You assign partners, leads, deals, and opportunity items to the correct territories using dimensions. If a lead has a partner, the lead is matched against partner-centric territories.

How to Expose Dimensions

Use these steps to expose dimensions you want to add to territories.

1. Sign in with your sales administrator credentials.
2. Ensure you're in a sandbox.
3. Search for and select the **Manage Territory Proposals** task.
4. On the Manage Territory Proposals page, click **Enable Dimensions and Metrics**.
5. On the Enable Dimensions and Metrics page, click **Edit**.
6. From the Actions menu under Dimensions, select **Add**.
7. Select the dimensions you want to expose, and click **OK**.
8. On the Edit Enable Dimensions and Metrics page, click **Save and Close**.
9. From the Actions menu on the Enable Dimensions and Metrics page, select **Load and Activate**.

Note: The Process Status on the Enable Dimensions and Metrics page displays **Load scheduled**, then **Load in progress**. You must wait for the load to complete before you can see the new dimensions on the Manage Territory Proposals page. You can select **Refresh Status** from the Actions menu to check on the load process. The load is finished when the Process Status displays **Activation completed successfully**.

How to Add Dimensions to a Territory

Use these steps to add dimensions to a selected territory.

1. Sign in with your sales administrator credentials.
2. Ensure you're in a sandbox.
3. Search for and select the **Manage Territory Proposals** task.
4. On the Manage Territory Proposals page, click the name of the territory proposal that contains the territory you want to edit.
5. From the list of territories in that territory proposal, click the name of the territory you want to edit.
6. In the Details area, click the **Coverage** tab.
7. Click the **Add** icon or, from the Actions menu, select **Add**.
8. On the Edit Coverage page, select the dimension you want to add from the Dimensions list.

9. Move the dimension members you want to add to the territory from the **Available Dimension Members** list to the **Selected Dimension Members** list.
10. Click **Save and Close** to save your work.

Note: If you're adding these dimensions to a parent territory and you want the child territories to also use these dimensions, you must add the dimensions to each child territory. For example, if you add a customer size dimension to a parent territory and you want the child territories to use the same customer size dimension, then you must add the same customer size dimensions to each child territory.

What's Assignment?

Assignment is the process of deciding what goes where or to whom. There are three categories of territory assignment:

- rule-based assignment
- territory-based assignment
- territory-based assignment + rule filtering

What are Mappings and Mapping Sets?

Mappings and mapping sets drive territory-based assignment. Mappings identify the dimensions, attributes, and territory filtering used during assignment processing.

There are three types of mappings:

- **Dimension Mapping:** You use dimension mapping when the work object and candidate object attributes in the comparison are dimension attributes, such as Product.
- **Attribute Mapping:** You use attribute mapping to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. You use attribute mapping when the work object and candidate object attributes in the comparison are non-dimensional attributes.
- **Literal Mapping:** You use literal mapping to filter the candidate objects. This form of mapping enables the comparison of candidate attributes against a specific value you selected. The assignment engine compares the mapped candidate object attribute against the specified literal value.

You use mapping sets to group mappings so that you can create more than one mapping for each combination of work object and candidate object. Mapping sets determine which mappings are used, and their sequence of use in territory-based assignment. You only use mapping sets with territory-based assignment and territory-based assignment with rule filtering. Mappings sets are predefined for accounts, leads, opportunities, partner accounts, and deals. However, you can define additional mapping sets for each combination of work object and candidate object.

Where do I Find the Mapping Sets for Channel Sales Objects?

The mapping sets for each object are located in the following setup tasks:

The following table shows the channel sales objects and the name of the setup task used to configure mapping for each, including the Manage Sales Assignment Manager Objects task for Partner Accounts, the Manage Sales Lead Assignment Object task for Leads and Deal Registrations, and the Manage Sales Assignment Manager Objects task for Opportunities and Revenue.

Channel Sales Object Name	Setup Task Name
Partner Account	Manage Sales Assignment Manager Objects
Lead	Manage Sales Lead Assignment Object
Opportunity	Manage Sales Assignment Manager Objects
Revenue	Manage Sales Assignment Manager Objects
Deal Registration	Manage Sales Lead Assignment Object

How do I Configure Channel Sales Territories?

The following steps provide an overview of the territory configuration process for channel sales.

1. Configure the types of sales territories you plan to create:
 - a. If you're setting up channel sales territories based on geography, you must enable the geographical elements you plan to use during territory setup for the countries for which you imported geography reference information. Optionally, you can organize the geography elements into zones.
 - b. You must enable the territory dimensions you plan to use in your channel sales territories.
2. Set up the channel sales territories themselves. This step involves:
 - a. Creating a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup, so it becomes useful when you want to readjust your territories in the future. When you change territories, your changes become active immediately.
 - b. Create the hierarchy of channel sales territories in the territory proposal starting with the top territory and working your way down.
 - c. Activate the territory proposal.
3. Configure your assignment options. Assignment behavior is controlled by a set of system profile options. By default, your sales applications do the following:
 - o Automatically assigns sales territories to accounts whenever an account is created or updated.
 - o Assignment of opportunities is manual: partner salespeople can either trigger the assignment process while editing an individual opportunity or the opportunities are assigned by the Sales Account Assignment Process which you set up to run periodically. Oracle sets manual assignment for opportunities as the default behavior to prevent performance issues for companies with large number of opportunities (100,000 and up). However, if your organization doesn't have such a large volume, you can have the application assign the opportunity automatically by setting the Assignment Submission at Save Enabled profile option to Yes.
4. Run the following assignment processes to assign account and opportunities respectively:
 - o Request Account Assignments
 - o Revenue Territory Territory Based Assignment

Note: You must run these processes immediately after you activate your territories and then set them to run on a regular basis, to handle ongoing assignments. How frequently you run these processes depends on your business needs.

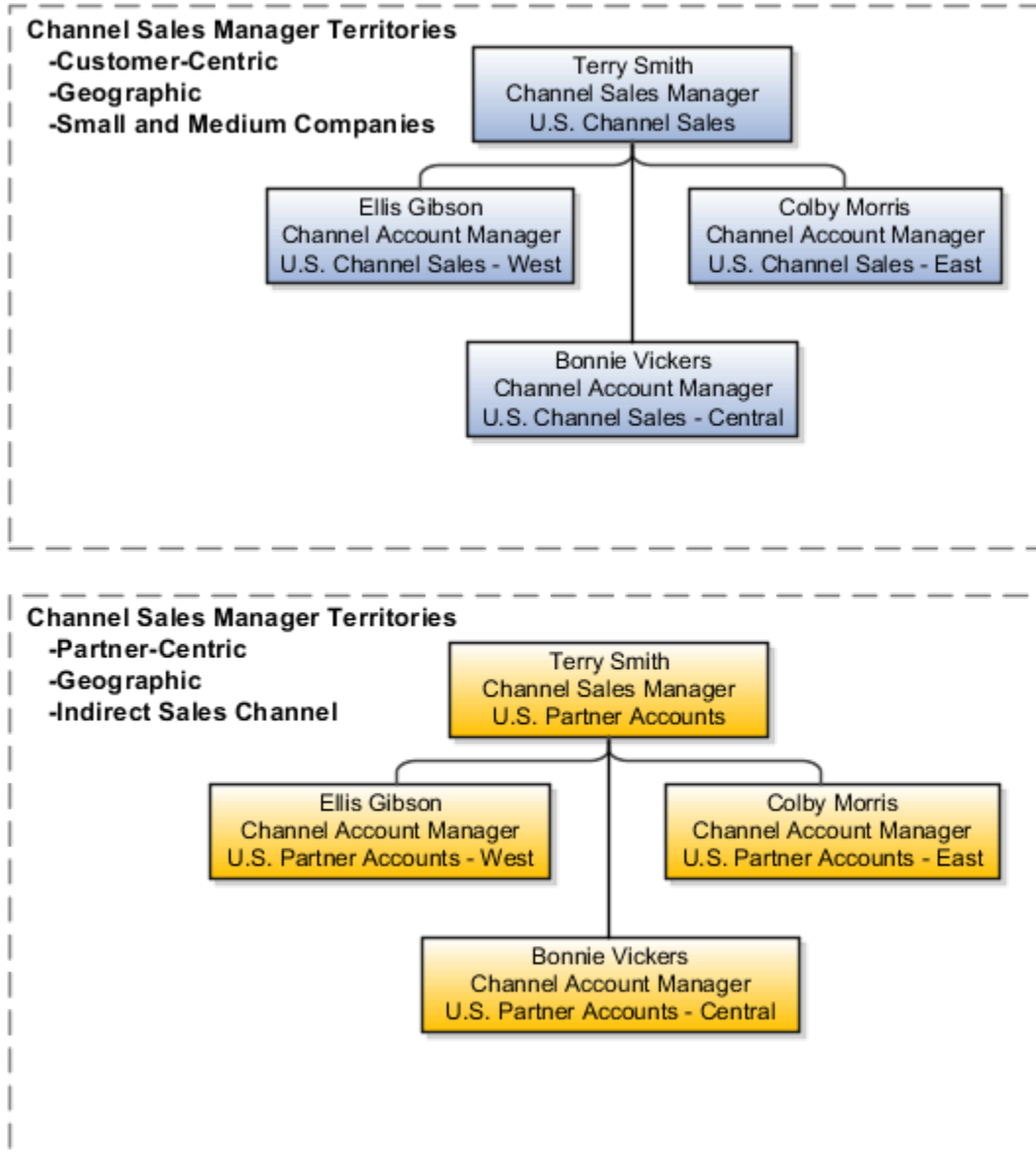
Example of Channel Sales Manager Territory

The following figure provides an example of a basic set of channel sales manager territories to support the two business use cases discussed throughout this guide. This example builds on the direct sales territory hierarchy established in the Getting Started with Your Implementation guide.

The channel sales manager territories are split geographically between Eastern, Central, and Western U.S. states. However, this example also uses the Company Size dimension to determine if the sales object should be assigned to the appropriate direct sales territory or to the appropriate channel sales manager territory. In this example, all objects where the company size is Large are assigned to direct sales, and all objects where the company size is Medium or Small are assigned to channel sales.

This figure shows the two sets of channel sales manager territories created to support the two business uses cases in this guide. The first set of channel sales manager territories are customer-centric, geographically split between East, Central, and West, and they're targeted at small to medium companies. The customer-centric channel sales manager territory for each geographic region has its own channel account manager. The second set of channel sales manager territories are partner-centric, geographically split in the same way as the first set of channel sales manager territories, and they're only for the indirect sales channel. The partner-centric channel sales manager

territory for each geographic region includes the same channel account manager as its customer-centric counterpart.



Configure Channel Sales Territory Assignment for Partner Accounts

This topic explains how to set up channel sales territory assignment for partner accounts.

Configure Channel Sales Territories for Partner Accounts

You can assign territories to partner accounts based on certain partner attributes. The attributes used for assignment are governed by a set of mappings between two objects, the work or assignment object, and the candidate object. Your

sales applications are preconfigured for Partner Account Territory Based Assignment. This process matches partner attributes with territory definitions and is controlled by the Manage Sales Assignment Manager Objects task. With territory based assignment for partner accounts, the work object is Partner Account, the candidate object is Partner Account Territory, and the child work objects are:

- Geography
- Customer Size
- Industry
- Organization Type

Map the Work Object to the Candidate Object

To configure territory assignment for partner accounts, you must set up a series of mappings, including:

- Belongs To attributes
- Serves To attributes (inactive by default)

The following table shows the values you need to map the Belongs To Partner Account work objects to the Partner Account Territory Candidate objects, the coverage model needed, and the territory type needed.

Partner Account Work Object	Partner Account Territory Candidate Object
Primary Address of the Partner	Geography
Organization Size	Customer Size
Industry	Industry
Organization Type	Organization Type
Auxiliary 1 (Disabled)	Auxiliary 1 (Disabled)
Auxiliary 2 (Disabled)	Auxiliary 2 (Disabled)
Auxiliary 3 (Disabled)	Auxiliary 3 (Disabled)
NA	Coverage Model: Partner Centric
NA	Type: Channel Sales Manager

The following table shows the values you need to map the Serves Partner Account work objects to the Partner Account Territory Candidate objects, the coverage model needed, and the territory type needed.

Partner Account Work Object	Partner Account Territory Candidate Object
Geographies Served	Geography
Industries Served	Industry
Product Specialties	Product
Partner Type	Sales Channel: Partner
NA	Coverage Model: Account Centric
NA	Type: Channel Sales Manager
NA	Rule Type Code: Regular

Assign Channel Sales Manager Territories to Leads

This topic lists the profile options you can configure for lead assignment, and it explains how to assign channel sales manager territories to leads and how to assign resources to leads.

Depending on your business needs, you can use either rule based assignment or territory based assignment to assign channel sales manager territories to leads, however all leads must use rule based assignment for resources. Leads are assigned to the appropriate territories based on matching lead attributes to territory dimensions. You can start lead assignment by the following means:

- When you schedule a batch assignment process. To use batch assignment, you must first configure it for leads.
- When you activate territory realignment.

What Profile Options Control Lead Assignment?

Several profile options govern assignment processing for leads. To find these profile options, you can use the Manage Sales Lead Profile Options task and search for profile options containing "MKL%ASSIGN". The Profile Values for the profile options are the Rule Set Groups created through the Manage Sales Lead Assignment Rules setup task.

The following table shows the profile options to configure for lead assignment, including MKL_LEAD_ASSIGNMENT_RULE for filtering matching territories for territory based lead assignment, MKL_LEAD_ASSIGNMENT_MATCHING_RULE for assigning resources to the lead team for rule based lead assignment, MKL_LEAD_ASSIGNMENT_SCORE_RULE for scoring leads, MKL_LEAD_ASSIGNMENT_RANK_RULE for ranking leads, MKL_LEAD_ASSIGNMENT_QUAL_RULE for qualifying leads, and MKL_LEAD_DEFAULT_ASGN_MODE for determining the type of assignment to be used.

Profile Option Name	Description
MKL_LEAD_ASSIGNMENT_RULE	The assignment rule set group for territory based lead assignment, which assigns territories to the lead territory team. The rule set group containing the rules that are used to filter matching territories

Profile Option Name	Description
	following territory matching. This profile option is optional, and if not set, rule filtering will not be performed and all matching territories will be assigned.
MKL_LEAD_ASSIGNMENT_MATCHING_RULE	The assignment rule set group for rule based lead assignment which assigns resources to the lead sales team.
MKL_LEAD_ASSIGNMENT_SCORE_RULE	The assignment rule set group for scoring leads. This computes and designates a score for each lead. For example, it assigns a value between 0 and 100 to the lead based on your business criteria.
MKL_LEAD_ASSIGNMENT_RANK_RULE	The assignment rule set group for ranking leads, which determines the value of the rank based on the business criteria defined in the rules.
MKL_LEAD_ASSIGNMENT_QUAL_RULE	The assignment rule set group for qualifying leads, which determines the value of the lead status based on the business criteria defined in the rules.
MKL_LEAD_DEFAULT_ASGN_MODE	Determines whether TBA, RBA or BOTH will be used.

How Does Territory Based Assignment to Leads Work?

The following steps provide a high-level overview of territory based assignment to leads.

1. The assignment process automatically identifies matching territories based on:
 - The associated sales account (includes most matching attributes)
 - Values unique to the lead, such as product, sales channel, and partner
2. If you use rules to filter identified territories, then assignment manager returns a subset of matching territories that satisfy your rule conditions.
3. Assignment manager then assigns the territories to the lead.
4. The sales team members on the lead gain full access to the lead.
 - The Owner fields does not change
 - Assignment does not impact the sales team

Note: If a lead has a partner, then the mapping set "Primary Partner Identifier (Partner Centric)" is matched against the lead.

How Does Rule Based Assignment of Leads Work?

All leads go through rule based assignment to resources. You can create rules to:

- Calculate and assign a score to leads
- Identify and assign a rank to leads
- Identify and assign a qualification status for leads

The following steps provide a high-level overview of rule based assignment of resources to leads.

1. The assignment process automatically identifies matching resources using rules that you set up.
2. Assignment manager then assigns the resources to the lead sales team.
3. The sales team members on the lead gain full access to the lead.

Map Objects to Candidate Objects for Leads

You must map the lead work object attributes to the lead candidate object attributes. You use the Manage Sales Lead Assignment Objects task to configure the mapping.

The mapping sets for leads are:

- Object: Sales Lead
- Candidate Objects:
 - Sales lead resource
 - Sales lead territory
 - Mapping Set 1: Sales Account Indicator
 - Mapping Set 2: Primary Partner Identifier
 - Mapping Set 3: Prospect Account Indicator
 - Sales lead rank
 - Sales lead qualification status

Assign Channel Sales Manager Territories to Opportunities

You use the Manage Sales Assignment Manager Objects task to configure territory assignment to opportunities.

This topic lists the profile options you can configure for opportunity team assignment, and it explains how to territory assignment to revenue items works, how rule based assignment of opportunities to resources works, and how to assign channel sales manager territories to opportunities.

You can't explicitly add territories to an opportunity. Rather, assignment manager automatically assigns territories to opportunity revenue items by matching the attributes of revenue items to territory dimensions, such as product or sales channel. When assignment manager assigns territories to opportunity product lines, the territory owner is also copied to the opportunity team.

What Profile Options Control Opportunity Team Assignment?

The following profile options control opportunity team assignment and other opportunity team functionality.

The following table shows the profile options that control opportunity team assignment and other opportunity team functionality and provides a description of each.

Profile Option	Description
Opportunity Assignment Mode	Determines the types of assignment modes allowed during opportunity assignment.
Opportunity Resource Deal Protection Period	Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment. The default value is 0.
Partner Resource Sales Team Access Level Default	Determines the default access level for partner resources added to the opportunity sales team. The default value is No Access.
Partner Resource Sales Team Function Default	Determines the default function for partner resources added to the opportunity sales team. The default value is Integrator.
Territory Based Resource Assignment Style	Determines whether to copy all territory resources to the opportunity team or just the territory owner during territory assignment. The default value is All.
Sales Team Member Assignment Rule Set Group	Specifies the rule set name that is used during rule-based assignment triggered by assignment manager.
Sales Team Member Recommendation Rule Set Group	Specifies the rule set name used during rule-based assignment when a user uses the team recommendations functionality.
Assignment Submission at Save Enabled	Determines whether the assignment engine is started automatically when an opportunity is saved. The default value is No.

How Does Territory Based Assignment of Revenue Items Work?

The following steps provide a high-level explanation of territory based assignment of revenue items.

1. The assignment process automatically identifies matching territories based on the following two mapping sets:
 - Sales Account mapping set (Sales account centric)
 - Partner mapping set (partner centric)
2. Opportunity Management then assigns the territories to the revenue line items while taking into consideration deal protection settings you have configured.
 - The territory owner and team members gain full access to the opportunity.
3. Opportunity Management adds the revenue items to the Opportunity team. The Owner field does not change, but the assignment process expands the visibility of the record.

How Does Rule Based Assignment of Opportunities to Resources Work?

The following steps provide a high-level explanation of rule based assignment of opportunities to resources.

1. The assignment process automatically identifies matching resources based on the rules you configured.
2. Assignment manager assigns the resources to the opportunity as team members.
3. Each team member gains access to the opportunity. The Owner field does not change.

How to Start the Assignment Process

To start the assignment process, from the Actions menu on the Edit Opportunity page, you select the Save and Assign Opportunity action.

Assign Channel Sales Manager Territories to Deal Registrations

This topic lists the profile options you can configure for deal registration assignment, and it explains how to assign channel sales manager territories to deal registrations.

What Profile Options Control Deal Registration Assignment?

Use the following profile options to configure deal registration assignment.

The following table shows the profile options used to configure deal registration assignment and provides a description of each.

Profile Option Name	Description
MKL_DEAL_DEFAULT_ASGN_MODE	Controls the type of assignment used for deal registrations. The default value is Rule-Based Assignment Only. You can change this value to Territory-Based Assignment Only or to Both.
MKL_DEAL_TBA_RULESETGROUP	Controls the deal resource rule category. This profile option is set at the site level for Deal resource Rule Category. If you create a rule for Manage Sales Lead Assignment Rules - Deal Resource Rule Category, the matching resources are added to the deal registration team.
MKL_DEAL_TBA_RULESETGROUP	Controls the deal territory rule category for territory based rule filtering. This profile option is set at the site level for Deal Territory Rule Category.

What is Deal Territory Mapping?

To assign territories to deal registrations, you must set the MKL_DEAL_DEFAULT_ASGN_MODE profile option to the type of assignment you want to use. You must define deal territories as **channel Sales Manager**-type territories and they must have a **customer Centric** coverage type.

The following table provides the Candidate Deal Territory to Deal Registration mapping sets for deal registrations, including Geography for Account Geography, Product(s) for Products, and Literal for **CHANNELSALESMANAGER**.

Candidate: Deal Territory	Deal Registration
Geography	Account Geography
Product(s)	Products

Candidate: Deal Territory	Deal Registration
Literal	CHANNELSALESMANAGER

How Does Territory Based Assignment to Deal Registrations Work?

The following steps provide a high-level explanation of the territory based assignment process for deal registrations.

1. When assignment manager runs, all matching territories are added to the Deal Registration Team tab.
2. When the human task is invoked, the first rule searches for channel sales manager in the territory and adds them to the deal registration team. The channel sales manager gains access to the deal registration, but the rest of the territory team members do not gain access to the deal registration.

9 Configure Business Intelligence for Channel Sales

Overview of Business Intelligence for Oracle Partner Relationship Management

Oracle Partner Relationship Management provides various analytics for your users. In most cases, you must first enable these analytics before your users can leverage these tools.

This chapter provides you with an introduction to all the places where your sales users can access and leverage business intelligence. You will also learn how to turn on and modify those analytics.

What's Available?

Your sales users can access business intelligence in many places.

The following table shows all of the locations where users can access business intelligence and it provides a description of what is available from each area, including using the Sales Infolet Page for on-the-go snapshots of key data, using the Analytics Tabs to access business intelligence specific to the business object where you see the tab, and using the Analytics Work Area to view and launch any report that is available to the user.

Area	What's Available
Sales Infolets Page	<p>This page, which users get to by navigating from the Welcome springboard using the white navigation dots just below the search field, provides infolet summaries modified for the roles in your organization. These infolet analyses are available on mobile, tablet, or laptop. Use this page for on-the-go snapshots of key data. Clicking an infolet drills down to more detail.</p> <p>For Channel Account Managers, this Sales Infolets page is already visible and automatically displays with prepackaged infolets. You can further modify this page, if you need to.</p> <p>For all other users, you must first enable the Sales Infolets page, and then add infolets to them.</p>
Analytics Tabs	<p>Many work areas, including the Analytics work area, provide additional Analytics tabs in context for easier access to business intelligence. These tabs appear along the side of the page.</p> <p>Typically, administrators or the Channel Operations Manager modify these tabs for users.</p> <p>For example, the Marketing Development Fund (MDF) work area provides three Analytics tabs that you can add. You must add the tabs to the work area first, then use Page Composer to add the reports.</p>
Analytics Work Area	<p>From the springboard, click Sales and then click Analytics. Analyses are managed on this page.</p> <p>The landing page in the Analytics work area is available by default. This is the one area which end users personalize for themselves:</p> <ul style="list-style-type: none">Users can search and launch any report available to them. The list of reports that users can search and see is controlled by administrators or the Channel Operations Manager.

Area	What's Available
	<ul style="list-style-type: none">Users can view Favorites (which they designate as such, themselves), or recently viewed analyses. There are also tools to print or e-mail analyses, as well as search for analyses.

Enable Business Intelligence

In some cases, business intelligence is already set up for your users. For the most part, however, you must first enable analytics for each role. The general steps are listed below.

1. Assign the right privileges to each role. Users with each role can then view the various analytics that you provide, or so they can add it themselves.
2. Optionally change the currency for each of your users, so that data appears correctly in reports.
3. For partners only:

Enable partner access to BI content.

(Channel users already have access to BI content.)

4. Finally, add BI content to sales pages.

Related Topics

- [Manage Access to Business Intelligence](#)
- [Display Partner Data in Reports](#)
- [Enable Partner Access to BI Content](#)
- [Sales Infolets](#)
- [Enable Analytics Tabs in the MDF Work Area](#)

Manage Access to Business Intelligence

Oracle Partner Relationship Management provides many locations where your sales users can access business intelligence. In most cases, you must first enable these analytics before your users can leverage these tools.

This topic is meant for the administrator who manages security for all users, including users with the Channel Operations Manager role. As the administrator, you must grant the right permissions so that your users can access the analytics made available to them, or so that they can add their own.

Manage Page Composer Access for the Channel Operations Manager

The Channel Operations Manager is typically the role who enables analytics for all Partner Relationship Management roles. Assign the right level of access so that the user assigned with this Channel Operations Manager role can modify analytics for others using Page Composer.

1. In OIM, assign the Channel Operations Manager role to your users who modifies analytics.

You must also assign the required external job roles for whom the channel operations manager is modifying analytics. Assign the required external job roles so that these users can enable analytics for those roles.

For example, if a certain user typically modifies BI content for partners, then you must assign all partner external job roles to that user. Once assigned, that user can access the Edit Pages option on a page enabled for Page Composer, select a partner external job role, and change BI content for that page and role.

Tip: After the modification of analytics is completed, you can remove the partner external job roles from the channel operations manager. Or, you can keep this user with all roles for the purposes of future modification needs, and create a separate user with only the Channel Operations Manager role who can execute true channel operations manager activities.

2. Grant Page Composer access to the Channel Operations Manager role.

Enable the Add Content button so that users with the Channel Operations Manager role can use Page Composer to embed analytics on a page.

To make the Add Content button visible, navigate to APM or the Security Console and assign the functional security policy (privilege) to the Channel Operations Manager.

The user with the Channel Operations Manager role can now see the Add Content button when entering into Page Composer mode on any Analytics side tab, or on the Sales Infolets page.

Grant Access to the Sales Infolets Page

The Sales Infolets page isn't automatically visible to most of your users. Instead, you must grant access to the specific roles who will use the Sales Infolets page.

To make the Sales Infolets page visible, navigate to APM or the Security Console and assign the functional security policy to the roles who need access to this page.

For Channel Account Managers, this Sales Infolets page is already visible and automatically displays with prepackaged infolets.

Manage Access for Customer-Defined Partner Roles

If you created your own partner roles or need to create them, then review these steps to ensure that your unique partner roles have the correct privileges to view BI content.

Partner Relationship Management provides the below roles for partners.

The following table shows the partner external job roles that are delivered, including the Partner Administrator, Partner Sales Manager, and Partner Sales Representative job roles and application roles. Both the Partner Organization Transaction Analysis BI duty role and the BI Consumer BI application role are assigned to each of these partner roles.

Job Role (External)	Application Role	BI Duty Role	BI Application Role
Partner Administrator	Partner Administrator	Partner Organization Transaction Analysis Duty	BI Consumer
Partner Sales Manager	Partner Sales Manager	Partner Organization Transaction Analysis Duty	BI Consumer
Partner Sales Representative	Partner Sales Representative	Partner Organization Transaction Analysis Duty	BI Consumer

If you need to create your own partner roles, then you should follow these steps:

1. Create an external job role in Oracle Identity Management and assign it to users.
2. Create a CRM application role in the Security Console.
 - a. In the Security Console, map this application role to the external job role.
 - b. In the Security Console, map this application role to the required duty role.

The duty role selection depends on what you need this unique role for.

3. Create an OBI application role In the Security Console.
 - a. In the Security Console, map this application role to the external job role.
 - b. In the Security Console, map this application role to a BI Duty Role.

For example, to create a customer-defined partner external job role, map this application role to the Partner Organization Transaction Analysis Duty role.

- c. In the Security Console, map this application role to one of these roles:
 - Transactional Business Intelligence Worker
 - Business Intelligence Applications Worker

If you already have a customer-defined CRM application role created In the Security Console, perform the below steps so that the OBI application role is mapped to the same external job role that the existing CRM application role is mapped to.

1. Create an OBI application role In the Security Console.
 - a. In the Security Console, map this application role to the external job role.
 - b. In the Security Console, map this application role to a BI duty role.

For example, to create a customer-defined partner external job role, map this application role to the Partner Organization Transaction Analysis Duty role.

- c. In the Security Console, map this application role to one of these roles:
 - Transactional Business Intelligence Worker
 - Business Intelligence Applications Worker

You can now use this new OBI application role to secure BI content in OTBI. Securing BI content means:

1. Only partners can see BI content meant for partners.
2. Partners can see only partner content related to their respective partner organizations, and nothing else.

That process is described in "Enabling Partner Access to BI Content: Explained."

Related Topics

- [Enable Partner Access to BI Content](#)
- [Sales Infolets](#)

Display Partner Data in Reports

To ensure that partner data is displayed in the right currency on reports, each end user should optionally set up their own reports currency. If this step is skipped, then reports will display data in the default currency.

Work with your end users to be sure they set up their own reports currency, if desired.

Set Up Your Reports Currency

This step is completed by each end user, so that Business Intelligence reports can properly display partner data in the desired currency.

To set up your reports currency:

1. Navigate to Business Intelligence.
2. Click **Reports and Analytics** in the navigator menu.
3. Click **Browse Catalog**.
4. Click the drop-down list arrow and select **My Account**.
5. Go to the **Preferences**.
6. Select your choice in **Currency**.

Related Topics

Enable Partner Access to BI Content

Oracle Partner Relationship Management provides business intelligence analyses and KPIs. You must make these analytics accessible to partners before they can view them.

Typically, the Channel Operations Manager or Sales Administrator manages partner access to analytics.

Making analytics accessible to partners is a two-step process.

1. First, move the intelligence content to a BI directory that's visible to partners.
2. Next, add the intelligence content to sales user interface pages.

Partners can't create and add their own analytics to sales pages.

Create Your Own BI Directories for Partner Content

Oracle Partner Relationship Management delivers business intelligence in a default location. However, partners can't access anything inside this default location. Instead, you must copy partner content to a directory you create, before adding the content to user interface pages. This ensures that whenever partners log in, they can search only the BI content made available to their specific role, such as Partner Sales Manager or Partner Sales Representative.

To create your own BI directories for partner content:

1. Sign in to BI Answers as a user with the Channel Operations Manager external job role.
2. Create your own directory under `/Shared Folders/Custom/Custom Customer Relationship Management`. For example:
`/Shared Folders/Custom/Custom Customer Relationship Management/Partner Admin`
3. Select this directory and, in the right pane, open the Permissions dialog by navigating **More > Permissions**.
4. Add the Partner Administrator role and select **Open (Read, Traverse)** access to allow partner administrators to run this directory's reports from the partner pages.
5. If the BI Consumer external job role is already assigned to this directory, then delete it.
6. For each partner-related external job role, repeat these steps:
 - a. Create a dedicated directory for each external job role (for example, Partner Sales Manager and Partner Sales Representative).
 - b. Assign the role to your directory.

Hide Unnecessary Content from Partners

In the previous section, you created your own directories for partner content. Adding content to these directories makes that content available to your partners. At the same time, you want your partners to see only that BI content, nothing else. To achieve this, remove partner access from other directories for all partner external job roles.

OTBI delivers one or more of the following directories directly under `/Shared Folders/Custom`:

- Customer Relationship Management
- Financials
- Functional Setup
- Human Capital Management
- Incentive Compensation
- Procurement
- Projects
- Supply Chain Management

To remove partner access from these directories:

1. Sign in to BI Answers as a user with the Channel Operations Manager external job role.
2. Navigate to `/Shared Folders/Custom`.
3. Select a directory (other than the Customer Relationship Management directory) and, in the right pane, open the Permissions dialog by navigating **More > Permissions**. For example:
`/Shared Folders/Custom/Financials`
4. In the Permissions dialog, add the role and select .
5. Repeat steps 3 and 4:
 - For all objects (directories and reports) directly under the directory.

- For all objects (directories and reports) under the Customer Relationship Management directory, except the partner-specific directories you previously created.

Do not update the permissions for any objects other than those objects in `/Shared Folders/Custom`.

Make Content Available to Partners

In the previous two sections, you created partner-specific directories and you have hidden all other BI content from partners. Next, copy partner content to your new directories so that partners can access that content from the application UI.

Partner content is delivered in this location:

`/Shared Folders/Sales/Embedded Content/`

Follow these instructions to copy content to your new directories.

1. Oracle-Provided Partner BI Content

Partner reports that Oracle provides are placed here:

`/Shared Folders/Sales/Embedded Content/`

Partners can't access this directory.

To make this content accessible to partners:

a. Reports

Copy the reports from the Embedded Content directory to your new directory. For example:

`/Shared Folders/Custom/Customer Relationship Management/Partner Sales Representative`

These reports are now accessible by partners.

Note: If the report uses a saved filter, then you must move the saved filter as well. Then, edit the report to ensure that it uses the new saved filter, now located in your new directory.

b. Dashboards

A dashboard includes one or more components, such as reports, prompts, images, and so on. This requires some additional configuration when moving to your directory. For example, a dashboard can point to a report. This means that when you copy a dashboard to a Dashboards directory that you created, you should also copy the underlying reports.

If a dashboard uses more than one item, such as reports and prompts and saved filters, then you must move all objects within the dashboard to the appropriate partner directory and add permissions.

Let's look at an example:

- Copy the Stalled Opportunities for Partner Representative dashboard from `/Shared Folders/Sales/Embedded Content/Partner Sales Representative/Dashboards` to `/Shared Folders/Custom/Customer Relationship Management/Partner Sales Representative/Dashboards`.
- This dashboard points to the **Stalled Opportunities for Partner Representative** report, which is a hidden report (displayed after checking "Show Hidden Items" check box). Copy this report as well

from /Shared Folders/Sales/Embedded Content/Partner Sales Representative to /Shared Folders/Custom/Custom Relationship Management/Partner Sales Representative.

- iii. Next, in your Dashboard directory, edit the dashboard so that the dashboard points to the report in partner directory you created.
 - a. On the dashboard, delete the existing Drill To: Stalled Opportunities for Partner Representative from section 1.
 - b. Expand the Catalog section from the bottom left.
 - c. Pull the hidden report from /Shared Folders/Custom/Custom Relationship Management/Partner Sales Representative.
 - d. Save the dashboard.

The dashboard is now configured to point to the report which is also in the directory that partners have access to.

Note: Remember to add partner roles to both the dashboard and its corresponding reports, so that partners can access and run all reports on the dashboard.

2. Customer-Defined Partner BI Content

In BI Answers, the Channel Operations Manager has access to a predefined set of subject areas, which can be used to create your own analytics, such as dashboards and reports, for partners.

The Channel Operations Manager can create this BI content and place it in the respective partner directory. For example:

/Shared Folders/Custom/Custom Relationship Management/Partner Sales Manager

Add Content to Partner Pages

Once you have moved partner BI content to directories that are accessible to partners, you can add that content to partner pages.

When partners sign in, they can access this content.

Related Topics

- [Manage Access to Business Intelligence](#)
- [Sales Infolets](#)
- [Enable Analytics Tabs in the MDF Work Area](#)
- [View MDF Reports in the Analytics Work Area](#)
- [How Subject Areas Work](#)

Add Analytics to Oracle Engagement Cloud Pages

Sales Infolets

The Sales Infolets page provides infolet summaries modified for the roles in your organization. Use this page for on-the-go snapshots of key data. These infolet analyses are available for the simplified UI on mobile, tablet, or laptop browsers.

Clicking an infolet drills down to more detail. To navigate to the Sales Infolets page, click the white navigation dots just below the search field on the Welcome springboard.

Note: For Channel Account Managers, this Sales Infolets page is already visible and automatically displays prepackaged infolets. You can further modify this page for your Channel Account Managers, if you need to. To see what infolets are available for the Channel Account Manager, see "Channel Account Manager Infolet Page: Explained." For all other users, you must first enable the Sales Infolets page, and then add infolets to them. For example, see "Channel Sales Manager Infolet Page: Explained."

The Sales Infolets page can be tailored for a specific user, such as the Channel Sales Manager, Partner Sales Manager, or Partner Sales Representative.

Enabling the Sales Infolets page involves three steps:

1. A user with the IT Security Manager role must enable the Sales Infolets page for display to Channel Operations Managers and other users.
2. Channel Operations Managers must copy the analytics to folders they created for all partner users.
3. Using Page Composer, the Channel Operations Managers can now display the analytics on the Sales Infolets page for partner users.

For Channel Account Managers and Channel Sales Managers, however, they can add/update/remove their own infolets using Page Composer.

Display the Sales Infolets Page

Channel Operations Managers and partners can't see the Sales Infolets page until the IT security manager provides them with access.

To do this, a user with the IT Security Manager role must give them the **View Sales Representative Dashboard** functional security policy in the Security Console.

Make Reports Visible to Partner Users

Reports are available in the Embedded Content directory.

Before partners can see these reports, Channel Operations Managers must copy them from the Embedded Content directory to a directory they created.

See: "Enabling Partner Access to BI Content: Explained" for more information.

Add Infolets to the Sales Infolets Page

Use Page Composer to add infolets to the Sales Infolets page.

You must have the role for which the infolets are being exposed. For example, if you're exposing an infolet for a Partner Sales Representative, then you must also have the Partner Sales Representative role, yourself.

Channel Sales Manager Infolet Page

You can tailor the Sales Infolets page for Channel Sales Managers. First, you must enable the Sales Infolets page and add infolets to it.

Then, Channel Sales Managers can use this page to get a quick snapshot of opportunities and team performance, and see where they need to focus for best results.

Below are the infolets available for Channel Sales Managers, as well as instructions on how to add infolets to the Sales Infolets page.

Channel Sales Manager Infolets and Detailed Reports

The following table lists the Channel Sales Manager analytics that you can add to the Sales Infolets page. This table also includes the location of the infolets and the corresponding detail reports (dashboards) that are used for these infolets.

Infolet Title	Infolet Contents	Location
Actual vs. Quota	<p>Tile: Actual vs. Quota:</p> <p>For the current quarter, this infolet shows the total quota assigned to the logged-in Channel Sales Manager and his subordinates, along with the actual revenue won by the partners of the Channel Sales Manager.</p> <p>Detail: Actual vs. Quota for Channel Sales Manager</p> <p>The detail report includes a gauge that displays the percentage of quota attained in the current quarter.</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>
Top Open Opportunities	<p>Tile: Top Opportunities</p> <p>This infolet shows the top open opportunities (Win Probability > 70%) in the pipeline by count and amount. This analysis is filtered to display opportunities with partners owned by the logged-in Channel Sales Manager and his subordinates.</p> <p>Detail: Top Open Opportunities for Channel Sales Manager</p> <p>The detail report uses key information such as Win %, Name, Customer, Partner, Sales Stage, Close Date, Amount, and Resource (name of subordinate).</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>
Stalled Opportunities	<p>Tile: Stalled Opportunities</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p>

Infolet Title	Infolet Contents	Location
	<p>This infolet shows opportunities expected to close in the current quarter that are stuck in the pipeline. Stalled is defined as open for a time period longer than the average duration of the sales stage. This infolet also filters opportunities with partners owned by the logged-in Channel Sales Manager or any of his subordinates.</p> <p>Detail: Stalled Opportunities for Channel Sales Manager</p> <p>The detail report uses key information such as Win %, Name, Account, Sales Stage, Days (stalled), Close Date, Amount, and Partner.</p>	<p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>
Open Pipeline	<p>Tile: Open Pipeline</p> <p>This infolet shows the total revenue and the number of open opportunities closing in the current and next quarter from partners owned by the logged-in Channel Sales Manager or any of his subordinates.</p> <p>Detail: Open Pipeline for Channel Sales Manager</p> <p>The detail report displays a chart of opportunities closing in the current quarter grouped by sales stage. The Channel Sales Manager can see open opportunities closing in the next quarter and grouped by partner, and can click each bar on the chart to obtain a detailed list of the related opportunities.</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>
Deals	<p>Tile: Deal Registration</p> <p>This infolet shows "pending approval" deal registrations that are submitted by partners who the Channel Sales Manager has access to.</p> <p>Detail: Deal Registration for Channel Sales Manager</p> <p>The detail report uses key information such as Submitted Date, Partner, Customer Deal Size, Close Date, and Deal Number.</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>
Team Performance	<p>Tile: Team Performance</p> <p>This infolet shows the name of the top performing resource (subordinate) and the percentage of the quota the resource has attained quarter-to-date.</p> <p>Detail: Team Performance for Channel Sales Manager</p> <p>The detail report displays a chart showing quarter-to-date won revenue and quota, by</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>

Infolet Title	Infolet Contents	Location
	resource or subordinate. The Channel Sales Manager can choose to compare attainment percentage against quota.	
MDF	<p>Tile: MDF Requests for CSM</p> <p>This infolet shows "pending approval" MDF requests submitted by partners owned by the logged-in Channel Sales Manager or any of his subordinates.</p> <p>Detail: MDF Detail Report for CSM</p> <p>The detail report uses key information such as Submitted Requests (Amount), Requests Pending Approval (Amount), Approved Requests (Amount), Claims Pending Approval, Approved Claims, and Settled Amount. The Channel Sales Manager can drill down into each amount to obtain a list of the related MDF requests.</p>	<p>Tile: /Shared Folders/Sales/Embedded Content/Channel Sales Manager</p> <p>Detail: /Shared Folders/Sales/Embedded Content/Channel Sales Manager/Dashboards</p>

Add Infolets for the Channel Sales Manager

To add infolets to the Sales Infolets page for Channel Sales Managers:

1. Activate a sandbox, logged in as the Channel Sales Manager.
2. On the landing page, click the Sales Infolet dot and, on the top right corner, click **Edit Pages** under your user name.
3. Select the Job Role option, and click **Channel Sales Manager**.
4. Click the Infolet Repository icon on the top right of the page and create or select the infolets to show or hide.
You can also add any infolets that you already created for the Channel Sales Manager.
5. Click **Create Infolet**.
6. Update the title of the infolet and then click **Save**. A new infolet appears on the page.
7. Click **Add Content**.
8. Navigate to the report location (see table above) and click **Add**.
9. On the top right corner of the infolet, click the arrow and select **Link Detailed Report**.
10. Click **Add Content** and navigate to the detailed report (see table above). Click **Add**.
11. To add additional infolets, repeat the steps above.

Related Topics

- [Sales Infolets](#)

Enable Analytics Tabs in the MDF Work Area

Three analytics tabs are provided for Channel Sales Managers in the Oracle Partner Relationship Management's Marketing Development Funds (MDF) work area, along the side of the page on the landing page. However, these three tabs are not automatically exposed to your users.

Before Channel Sales Managers can see these tabs, you must first enable them.

Note: This topic is applicable for all object work areas, not just the MDF work area, where you can add Analytics tabs to the object's landing page.

Display the MDF Analytics Subtabs

To expose a tab on an object's landing page, or on the Analytics work area itself:

1. The Channel Operations Manager should log in as an administrator.
2. Navigate to **Tools**, then **Structure**.
3. Under Partner Management, click **MDF**.
4. Set the drop-down list value under the Visible column to **Yes**.

The Analytics tabs are blank until you add content to them.

Tip: You can also add Analytics tabs on an object's details page (edit page). To do this, use Application Composer.

Add Content to Analytics Subtabs

Once you have enabled the display of these tabs to your users, you must now add content to them. Use Page Composer to add content to the Analytics tabs in the MDF work area.

Before you can add content using Page Composer, you must have the **Configure Sales UI** functional security policy (privilege).

1. From the Home page, click **Partner Management**, then **MDF**.
2. In the Settings and Actions menu under your name, click **Edit Pages**.
3. Select the external job role who should see this content.
4. Click **Add Content** to add the desired reports to the Analytics tab.

Related Topics

- [Enable Partner Access to BI Content](#)
- [Manage Access to Business Intelligence](#)

View MDF Reports in the Analytics Work Area

Business intelligence is available to view on the Analytics work area, but your Channel Sales Managers, Channel Account Managers, and budget owners will have to search for this content themselves to view it.

For example, Oracle Partner Relationship Management delivers Marketing Development Fund (MDF) reports, but your users must first manually search for these reports on the Analytics work area before they can view them.

About the Marketing Development Fund Reports

Two MDF reports are available to your users:

- MDF Summary

For Channel Account Managers and Channel Sales Managers

- MDF Budget Summary

For budget owners

Add MDF Reports to the Analytics Work Area

To view these reports on the Analytics work area, your users must first search for and then select the reports they want to view.

1. Your users should first click the Analytics icon under the Sales cluster.
2. Then, they can search for and select the report.

This report will remain in the work area for the duration of the user's session.

3. Optionally, mark the report as a favorite. Reports that are marked as favorites always appear on the Analytics work area.

10 Expand Your Channel Sales Capabilities

Create Your Own Workflows and Notification for Channel Sales

Create Your Own Workflows for Channel Sales

You can create your own approval workflow so that all partner opportunities can be registered and submitted for approval by channel managers, to avoid channel conflict.

You can use the registration status of an opportunity to keep track of where the partner opportunity is in the overall registration process.

Use case: The channel manager is notified (by email or notifications) when a partner user submits an opportunity for registration approval. The partner user (who is the opportunity owner) is notified when the channel manager takes approval action (approve/reject/return) on the opportunity.

Use the following procedure.

1. Sign in as a user with setup privileges, such as Sales Administrator or Application Implementation Consultant.
2. Ensure you are not in your sandbox.
3. From the Navigator, click **More** and from the Tools menu, select **Application Composer**.
4. Under Common Setup, click **E-Mail Templates**.
5. On the E-Mail Templates page, click the **Create** icon.
6. On the Create E-Mail Template page, do the following:
 - Select **Opportunity** from the Objects list.
 - Type a name for your template.
 - In the E-Mail Subject region, select the **Name** field from the Select Fields list and click **Insert**. This populates [\$Name\$] into the subject line. Add "submitted for approval" after the [\$Name\$] syntax.
 - In the E-Mail Body region, select the **Name** field from the Select Fields list and click **Insert**. This populates [\$Name\$] into the body. Add "submitted for approval" after the [\$Name\$] syntax.
 - Click **Save and Close**.
7. From the Settings and Actions menu, click **Manage Sandboxes** and select and activate the sandbox you created earlier.
8. When you are back in your sandbox, from the Navigator, click **More** and from the Tools menu, click **Application Composer**.
9. Under the Common Setup region in the tree, click **Object Workflows**.
10. From the Actions menu, click **Create**.
11. In the Create Object Workflow page:
 - Select **Opportunity** as the object.
 - Enter a name for the workflow.
 - Under Event Point and Condition, select the radio button for **When record is updated**.
12. Under conditions, click the Create icon for the Groovy editor/builder.

13. In the Expression Builder window, in the free-form text area at the bottom of the window, enter the following Groovy condition:

```
def secCtx = adf.context.getSecurityContext()

if (secCtx.isUserInRole("ZPM_PARTNER_SALES_MANAGER_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_SALES_REPRESENTATIVE_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_ADMINISTRATOR_JOB"))

    {if (isAttributeChanged('RegistrationStatus') && RegistrationStatus=='OPTY_SUBMITTED') return true;}
```

14. Click **OK** to save your changes.
15. In the Create Object Workflow page, in the Actions region, click the **Create** icon for E-mail Notification.
16. In the Create Action: E-Mail Notification page, type a name for your notification.
17. In the Create Action: E-Mail Notification page, in the E-Mail Details region, select the template you created at the beginning of this procedure.
18. In the Create E-Mail Template page:
 - o Enter a name for the email template.
 - o In the E-Mail Subject region, select the **Name** field from the Select Fields list of values and click **Insert**. This populates [\$Name\$] into the subject line. Add "submitted for approval" after the [\$Name\$] syntax.
 - o In the E-Mail Body region, select the Name field from the Select Fields list of values and click Insert. This populates [\$Name\$] into the body. Add "submitted for approval" after the [\$Name\$] syntax.
 - o Click **Save and Close**.
19. Back in the Create Action: E-Mail Notification page: Under Recipient Type, select **Specific users** to retrieve the Add More Recipients page. Remove the following: Manager of Owner, Opty Team Member - Function: Channel Manager.
20. Click **OK**.
21. Save changes in the Create Action: E-Mail Notification page.
22. In the Create Object Workflow page, in the Actions region click the **create** icon for Business Process Flow.
23. In the Create Action: Business Process Flow page:
 - o Enter a name for the flow.
 - o Click the search icon next to the Project Name field. Search for and select the project **ExtnBusinessProcessComposite**.
 - o Under Inputs, provide the following within single quotes:
 - Approver: provide the ID of the Channel Sales Manager
 - Held EntityStatus field: provide the registration status
 - E-mail Address: provide the e-mail address for the partner user to receive notification once it is approved or rejected.
 - o Save your changes.
24. To verify that the approval workflow has been configured correctly, sign in to the Partners UI with your partner user credentials and edit an opportunity.
25. Create and update the opportunity partner registration status to Submit.
26. Click **Save and Close**.
27. Search for the same opportunity to refresh. Verify you receive an e-mail notification.
28. Sign out. Sign back in with your Channel Sales Manager credentials.

You see the opportunity waiting for approval in the work list area of your dashboard.
29. Select the opportunity and click **Approve** or click **Reject**.

30. Sign out. Sign back in with your partner user credentials and navigate to same opportunity. Drill-down to see if the Registration field shows a status of Approved. Check for an email notification.
31. Close the opportunity, updating status and related fields.

Configure Approval Workflow for Deal Registration

The deal registration process involves several decision points. Sales administrators and application implementation consultants can configure the approval workflow so that each request is routed to appropriate person or persons for approval.

Sales administrators and application implementation consultants can use Approval Manager to configure deal registration approval workflow to support the following use cases:

1. Route deal registration approval notification simultaneously to a central group of approvers with the same role, such as an operational group consisting of users who are not channel account managers.
2. Route deal registration approval notifications sequentially to a hierarchy of users with approval authorization, such as channel account managers and the channel sales managers to whom they report.
3. Route deal registration approval notifications in parallel to users with different roles such as channel account managers and sales operations.
4. Route deal registration approval notification to a single or list of approvers for situations when no one else is identified through other rules.

Sales administrators and application implementation consultants can use these steps to configure approval workflow for partner deal registrations.

1. Sign in with your sales administrator or application implementation consultant credentials.
2. From Navigator, select **Setup and Maintenance**.
3. Search for and select the **Manage Administration Profile Options** task.
4. Change the profile option MKL_DEAL_USE_DEFAULT_APPROVAL_PROC from **Yes** to **No**.
5. From Navigator, click **Tools, Application Composer**.
6. Under Common Setup, select **Business Processes**.
7. Copy the default MKLDealsApprovalProcessComposite and create a new one, using the default as your template.
8. Click Editing the Project, make your changes and save it with a different title - such as "Deal Registration Modified Approval Process".
9. Under the Common setup region in the tree, click **Object Workflows**.
10. Click the **Create** icon.
11. In the Create Object Workflow page:
 - Select **Deal Registrations** as the object
 - Enter a name for the workflow.
 - Under Event Point and Condition, select the radio button for **When record is updated**.
12. Under conditions, click the green icon for the Groovy editor/builder.
13. In the Expression Builder window, in the free-form text area at the bottom of the window, enter the following Groovy condition:

```
def secCtx = adf.context.getSecurityContext()

if (secCtx.isUserInRole("ZPM_PARTNER_SALES_MANAGER_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_SALES_REPRESENTATIVE_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_ADMINISTRATOR_JOB"))
```

```
{if (isAttributeChanged('RegistrationStatus') && RegistrationStatus=='DEAL_SUBMITTED') return true;}
```

14. Click **OK** to save the changes.
15. In the Create Object Workflow page, in the Actions region click the **create** icon for Business Process Flow.
16. In the Create Action: Business Process Flow page:
 - o Enter a name for the flow.
 - o Click the search icon next to the Project Name field. Search for and select the new project you created.
 - o Under Inputs, provide the following within single quotes:
 - Approver: Channel Sales Manager ID
 - Held EntityStatus field: Registration status
 - E-mail Address: Partner user e-mail address to receive notification once it is approved or rejected.
17. Save your changes.

Configure Notifications for Deal Registration

Communication between partners and their channel team is crucial during the deal registration process. Sales administrators or other setup users, such as application implementation consultants must set up notifications between partners and the channel organization for each stage of the deal registration process.

Create a Notification for the Human Workflow Task

If email notifications are turned on, the email notification should provide the following information:

- Subject line: <Action><Object type><Object name/id><(Main Value)><for value if 'from' is different from 'for'>"Approve Deal Registration <Deal Reg Num> from <Partner Name> for <Account Name>, (<Deal Size with currency>)"
- Body: "<Submitted By> from partner <Partner Name> has submitted a deal registration for your approval.
- Account: <Account Name>
- Deal Size: <Deal size with currency>"

Sales administrators or application implementation consultants can use Object Workflow to modify the email notification template by changing the text and fields included in the Subject line and email body. They can also include or remove deep links to other sales application pages in the email body.

Sales administrators and application implementation consultants can use these steps to configure notifications for partner deal registration.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From Navigator, click **Tools, Business Processes**.
3. Select the new business process you created for deal registrations.
4. Under the Common setup region, click **Object Workflows**.
5. Click the **Create** icon.
6. In the Create Object Workflow page, in the Actions region, click the **Create** icon under Email Notification.
7. In the Create Action: Email Notification page, enter a name for the notification.
8. In the Create Action: Email Notification page, in the Email Details region, next to the Email Template field, click the create icon to create a new email template.
9. In the Create Email Template page:

- Enter a name for the email template.
 - In the Email Subject region, select the **Name** field from the Select Fields list of values and click **Insert**. This populates [\$Name\$] into the subject line. Add "submitted for approval" after the [\$Name\$] syntax.
 - In the Email Body region, select the Name field from the Select Fields list of values and click Insert. This populates [\$Name\$] into the body. Add "submitted for approval" after the [\$Name\$] syntax.
 - Click **Save and Close**.
10. Back in the Create Action: Email Notification page: Under Recipient Type, select **Specific users** to retrieve the Add More Recipients page. Remove the following: Manager of Owner, Deal Reg. Team Member - Function: Channel Manager.
 11. Click **OK**.
 12. Save your changes in the Create Action: Email Notification page.

Configure the Default Notification Layout

Sales administrators can use Application Composer to configure the default deal registration notification layout. The modifications sales administrators can make to the deal registration notification layout include:

- Adding standard and custom attributes.
- Removing standard and custom attributes.
- Hiding the "Products" region.
- Creating dynamic layouts, such as including Approve, Return, and Reject actions.
- Creating field groups.

Sales administrators and setup users can follow these steps to configure the Deal Registration Notification layout.

1. Sign in with your setup user credentials.
2. Ensure you are in an active sandbox.
3. From the Configuration menu in the Navigator, click Application Composer.
4. From the list of standard objects in Application Composer, expand Deal Registration.
5. Under Deal Registration, click Pages.
6. In the list of Deal Registration pages, scroll to the Deal Registration Notification section.
7. From the Actions menu, select Duplicate to duplicate the standard layout for deal registration notifications and edit the resulting copy of the layout.
8. On the Edit Layout page, you can see a list of fields for deal registration notification. If you want to add or remove fields on the Deal Registration Notification region, click the Edit icon and move the appropriate fields between the Available Fields list and the Selected Fields list.
9. After you have made your changes, click Save and Close.
10. If you want to hide the deal registration products region, click Hide next to Deal Registration Notification Products.
11. If you want to add or remove fields on the Deal Registration Notification Products region, click the Edit icon and move the appropriate fields between the Available Fields list and the Selected Fields list.
12. After you have made your changes, click Save and Close.
13. When you are satisfied with your changes to the Deal Registration Notification layout, click Done.
14. Verify that the notifications now include your configuration changes and publish your sandbox.

Change Security to Enable Notifications Using Email Templates

When an approver approves or rejects a partner self-registration request, a web service operation changes the partner record from Prospective to Registered or Rejected status and the approver also sends an email notification that alerts the partner to this status change.

Note: The partner status values are defined by the standard ZPM_PARTNER_STATUS lookup type. You can't edit these values or add to them.

The web service operation utilizes a special user, FUSION_APPS_CRM_SELFSERVICE_ADF_APPID, to initiate this operation during the partner self-registration process. If email templates have been configured for these notifications regarding the registration request status change, the special user must initiate the process. However, by default, this special user doesn't have the necessary functional security permissions to access these email templates.

Follow these steps to add the functional security policy to the FUSION_APPS_CRM_SELFSERVICE_ADF_APPID user.

1. Sign in to APM with your sales administrator credentials.
2. On the left side of the page, specify the search filter as **Search for Users in Global Scope** and the user name as **FUSION_APPS_CRM_SELFSERVICE_ADF_APPID**.
3. Click **Search**.
4. Select the row returned in the search results table and click **Open**.
5. On the User Details page, click the **Application Role Assignments** subtab.
6. Click **Map (+)**.
7. On the dialog that appears, select the Application Name **IDCCS**.
8. Specify **CRMRead** as the display name for the application role, and click **Search**.
9. In the search results table, select the row that's returned, and click **Map Roles**. The Map Application Roles to User dialog window closes and you return to the User Details UI.
10. Verify your changes.
11. Sign out of APM for your changes to take effect.

Configure Partners

Partner Types

Partner type describes what type of business the partner engages in and, subsequently, what role the partner company will play in the partnership. There are many different types of partners, such as distributors, resellers, service providers, solution providers, and so on.

A number of default partner types are included. Sales administrators can add new partner types or disable existing partner types with the ZPM_PARTNER_CHANNEL_TYPES lookup type in the Manage Partner Lookups task.

The table below lists the default partner types.

Partner Type	Description
Business process owner	Partners that are responsible for managing business processes within an organization, typically by using key performance indicators to measure how successfully the organization meets its business process objectives.
Certification and compliance provider	Partners that ensure companies have the appropriate qualifications and are in compliance with all necessary policies or regulations. They also offer preparation for and assistance during certification and review process.
Education services provider	Companies that contract to sell education services as a product.
Independent software supplier	Companies that provide complimentary solutions on top of the supplier products.
Original equipment manufacturer	Companies that include the software or hardware components of a supplier in their own products. For example, a computer manufacturer could buy storage disks from a storage supplier and sell them as part of their own desktops. These relationships are very complex. Usually suppliers have specialized pricing and products for specific original equipment manufacturers.
Reseller	Partners can be direct resellers, who buy from suppliers and sell to end customers, or indirect resellers, who have a relationship with the supplier but do all buying through distributors.
Support services provider	Companies that provide hardware or software services, such as consulting or technical support, for the channel organization's products.
Systems integrator	Consulting companies that usually provide services.
Value added distributor	Partners that add features or services to existing products, maintain supplier stock, and sell to customers and to other partners of the supplier.

Configure Partners for Channel and Partner Roles

To fully use partner relationship management for channel sales execution, you must perform several configuration procedures. The following sections provide steps to configure pages for Partners and Partner Contacts in Application Composer.

Configure Pages With Application Composer

The following Application Composer steps are not mandatory configuration steps. However, in cases where the brand owner company must provide a different page layout to the partner administrator, you must configure the following pages:

- Edit Partner: Profile page
- Create Partner Contact page
- Edit Partner Contact: Profile page

Note: Partner and partner contact list Summary Table pages are also configurable using Application Composer, but Summary Table pages are not configurable based on role. Any configurations done to the list pages are applicable across all user roles.

Configure the Partner Profile Page

Application implementation consultants and sales administrators can use these steps to configure the Partner Profile page for channel and partner roles.

1. In your active sandbox, click **Navigator**.
2. Click **Tools**, and click **Application Composer**.
3. Navigate through tree: Standard Objects: Partner: Pages.
4. Select the Default layout under Details Page Layouts.
5. Click **Duplicate Layout**.
6. Give the new layout a meaningful name like Partner Administrator Layout.
7. Click **Save and Edit**.
8. Now you can edit details in the Partner profile tab based on what attributes you want to expose to partner users.
Note: Other subtabs like Opportunities, Contact, and Activities are also available for modification from here.
9. After you make all of your layout changes, click **Done**.
You see the new layout in the Details Page Layouts table.
10. Ensure that you select the right role (Partner Administrator) you want to apply for the layout.

Configure the Create Partner Contact Page

Application Implementation Consultants and Sales Administrators can use these steps to configure the Create Partner Contact page for channel and partner roles.

1. In your active sandbox, click **Navigator**.
2. Click **Tools**, and click **Application Composer**.
3. Navigate through tree: Standard Objects: Contact: Pages
4. Select the Default layout under Creation Page Layouts - Create Partner Contact.
5. Click **Duplicate Layout**.
6. Give the new layout a meaningful name like Partner Administrator Layout.
7. Click **Save and Edit**.
8. Now you can edit details in the Create Partner contact page based on what attributes you want to expose to partner users
9. After you make all of your layout changes, click **Done**.
Note: You see the new layout in the Details Page Layouts table.
10. Ensure that you select the right role (Partner Administrator) that you want to apply for the layout.

Configure the Partner Contact Profile Page

Application Implementation Consultants and Sales Administrators can use these steps to configure the Partner Contact Profile page for channel and partner roles.

1. In your active sandbox, click Navigator.

2. Click **Tools**, and click **Application Composer**.
3. Navigate through tree: Standard Objects: Contact: Pages
4. Select the Default layout under Details Page Layouts - Edit Partner Contact.
5. Click **Duplicate Layout**.
6. Give the new layout a meaningful name like Partner Administrator Layout.
7. Click **Save and Edit**.
8. Now you can edit details in the Partner contact profile tab based on what attributes you want to expose to partner users.
9. After you make all of your layout changes, click **Done**.
Note: You see the new layout in the Details Page Layouts table.
10. Ensure that you select the right role (Partner Administrator) that you want to apply for the layout.

Create Partner Task Templates

A task template is a group of tasks associated with a business object, such as Partners.

Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use the Manage Partner Task Template setup task to create task templates for partners. Channel managers and partner administrators can then use these templates to quickly create multiple tasks with a single click. The tasks generated from the template are accessible to users in the Activities subtab on Partner pages.

By default, this feature is hidden, however sales administrators can use Application Composer to expose a 'smart' Create Task button on the Embedded task list of the Activity object. When a valid task template has been created, a Create Tasks from a Template option is available from the Create Task button. If no valid task templates have been created, then the Create Task button functions as it always has.

The process of creating task templates and making them available to channel managers and partner administrators involves the following:

1. Create the task template and create the individual tasks for the template.
2. Expose the 'smart' Create Task button on the Embedded task list of the Activity object.

Create a Partner Task Template

Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use these steps to create task templates for partners.

1. Sign in with your Customer Relationship Management Application Administrator or Application Implementation Consultant credentials.
2. Navigate to the Sales offering in Setup and Maintenance.
3. Search for and select the **Manage Partner Task Template** setup task.
4. On the Manage Partner Task Template page, click the **Create** icon.
5. On the Create Template pop-up, provide information in the following fields:

The following table lists the fields available on the Create Template pop-up and provides a description for each field.

Field	Description
Template Name	Enter the name of the template.

Field	Description
Description Template Set	Enter a brief description about the template name, if required.
Active	Selecting this check box indicates that the template is active. The check box is selected by default.
Template Type	The business object to which the task template is associated is set as default. For partner task templates, the template type is Partner Profile.
Subtype	The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank.
Template Set	Select the template set (Set ID) that you want to associate with your business unit.

6. On the Create Template pop-up, click **OK**.
7. To create tasks for the task template, click the **Create** icon in the Details section.
8. On the Create Task pop-up, provide information in the following fields:

The following table lists the fields available on the Create Task pop-up and provides a description for each field.

Field	Description
Subject	Provide a subject for the task.
Description	(Optional) Describe the task.
Lead Time	(Optional) Enter the lead time for the task.
Type	(Optional) Select a type for the task.
Template Duration	(Optional) Define the due date for the task. The due date is calculated based on the template duration value and the task start date. If the duration is blank in the template task, the task is created without a due date.
Priority	(Optional) Select a priority for the task.

9. On the Create Task pop-up, click **OK**.
10. Click **Save and Close** to save your work

Add the Smart Create Task Button to Activity Pages

Use these steps to replace the Create Task button with the 'smart' Create Task button on Activity pages.

1. Sign in with your Sales Administrator credentials.
2. Ensure you are in a sandbox.
3. From the Navigator, click **Application Composer**.
4. From the list of Standard objects, expand **Activity**.
5. Click the **Pages** link.
6. In the Activity Pages list, scroll down to the Embedded Task List Overview page.
7. Duplicate the standard layout and click **Create and Edit**.
8. On the Edit Layout page for your duplicate layout, click the **Edit** icon for the Embedded Task List Overview Table.
9. In the Configure Detail Form: Buttons and Actions area, move the **Create Task + Create Task From Template** button from the Available Buttons column to the Selected Buttons column.
10. In the Configure Detail Form: Buttons and Actions area, move the **Create Task** button from the Selected Buttons column to the Available Buttons column.
11. Click **Save and Close** and click **Done** to save your work.
12. Publish your sandbox.

Review an Impersonation Audit Record

Sales administrators can review audit records for all changes made while impersonating a partner user.

Sales administrators can use these steps to review all of the changes made during a partner user impersonation.

1. Sign in with your Sales Administrator credentials.
2. From the Tools menu in Navigator, select **Audit Reports**.
3. In the Date field on the Audit Reports page, provide the date on which the impersonation took place.
4. Provide at least one of the following search criteria:
 - User - provide the name of the partner user who was impersonated.
 - Product - select **Sales**.
5. Optionally, from the Event Type list, you can select the type or types of impersonation events you want to see, such as Object Data Insert, Object Data Update, and Object Data Delete.
6. From the list of business object types, select the type of record you want to want to review. You can from select the following:
 - Accounts
 - Contacts
 - Leads
 - Opportunities
 - Activities
7. Optionally, you can select the Include Child Objects option if you want to include child objects in your search.
8. Click **Search**.

The Search Results region displays the results of your search.

9. You can select the Show Impersonator option to see the user name of the user who impersonated the partner use.
10. You can select the Show Attribute Details option to see more details about your search results.
11. You can select the Show Extended Object Identifier Columns to see additional ID information.
12. You can click the Export to Excel icon to create a .CSV file for your search results.

Configure Leads

Set Up Partner Channel Sales in Leads

To fully use partner relationship management for channel sales execution in leads, you must perform several configuration procedures. Some of these procedures may include:

- Modifying page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields
- Enabling your partner users to convert leads to opportunities
- Creating assessment templates used to qualify leads
- Validating default assignment type used
- Defining assignment rules if you select rule-based mode.

The exact tasks depend upon your unique business requirements.

Note: These tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant.

Modify Page Layout for Leads

Following is a sample procedure for modifying the layout of the Leads pages for different user types.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. Navigate to Lead pages: Select **Standard Objects, Sales Lead**, and then click **Pages**.
3. Ensure that the **Simplified Pages** tab is active.
4. In the **Creation Page Layouts** section, edit any modified layout. If none exists, then duplicate the standard layout and edit the resulting modified layout.
5. Edit the **Fuse Lead Create** page region. Make the following changes to the layout:
 - Add the field, **PartnerOwnerName**. (You will rename this field to Channel Manager later.)
 - Reorder the fields so that **Attachments** is before **Status**.
6. Save your changes.
7. Associate the layout with the appropriate user roles. Select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Partner Administrator
 - Partner Sales Manager

- Partner Sales Representative
- 8. Next, create a modified layout for the Edit Lead page. Ensure you're in the **Simplified Pages** tab. In the **Details Page Layouts** section, edit any user-defined layout. If none exists, then duplicate the standard layout and edit the resulting copy of the layout.
- 9. In the Summary subtab, edit the **Summary** region.
- 10. Make the following changes:
 - Add the field **PartnerOwnerName**. (You will rename this field to Channel Manager later.)
 - Reorder the fields so that **Attachments** is before **Status**.
- 11. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Partner Administrator
 - Partner Sales Manager
 - Partner Sales Representative
- 12. Make sure the new layout comes before the Standard Layout in the table.
- 13. Test your changes by signing in as a user with one of the roles you associated with the layout.
- 14. Publish the sandbox.

To modify the layout for channel account manager and channel sales manager:

1. Make a copy of the appropriate layouts you created or modified earlier and:
 - Remove **PartnerOwnerName** in the Summary region.
 - In the Sales Team subtab, add the **Organization** field to the Summary Table and move it directly after Team Member.
2. Make sure the new layout comes before the Standard Layout in the table but after the partner user layout.

Rename Field Labels

You can rename field names from their default values to new values, as needed.

1. In Application Composer, navigate to **Sales: Standard Objects: Sales Lead: Fields**.
 - a. Click the **Standard** tab.
 - b. For each field to be renamed, select the row, and click **Edit the Selected Field**.
 - c. Under **Appearance**, edit the display labels. Following is a sample of the fields you may want to change.The following table shows some field names that you can rename for leads in channel sales, including PartnerLevelMeaning, PartnerOwnerName, and Primary Partner. This table also indicates modified display labels for those fields, including Partner Level, Channel Manager, and Partner.

Default Field Name	Modified Display Label
PartnerLevelMeaning	Partner Level
PartnerOwnerName	Channel Manager
Primary Partner	Partner

Default Field Name	Modified Display Label

- d. Save your changes.

Additional Modifications in Page Composer

You may want to make additional changes in Page Composer for the Sales Lead object. This section presents some example modifications you would make for both channel and partner salesperson roles.

For Partner Sales Representative, Partner Sales Manager, and Partner Administrator roles:

- Modify the Leads landing page table layout by reordering, removing, or adding columns.

For the channel account manager and channel sales manager:

- Add the Partner column.
- Move the Age in Days column to the right of the Name column.

For partners:

- Add the Source and Accepted Date columns.

Create Saved Searches

You may want to your own saved searches for partner users. This section presents some example modifications you would make the both channel and partner salesperson roles.

To find opportunities for Channel Account Manager: "Opportunities where I am on the team" should be default.

To find leads for the Channel Account Manager, expose the following fields in the search:

- Pending Distribution
- Pending Acceptance
- Accepted Partner Leads

To find leads for partners, expose the following fields in the search:

- Brand Owner Assigned Leads
- My Open Accepted Leads
- All Accepted Leads

Enable Partner Users to Convert Leads to Opportunities

Depending on your company policy, you can configure custom partner roles to enable your partner users (and not just channel managers) to convert leads to opportunities. To do this, complete these steps:

1. Navigate to the Security Console and click the Roles tab.
2. Find the custom partner role that you want to modify, and click **Edit Role**.
3. On the Function Security Policies page, on the Privileges tab, click **Add Function Security Policy**.
4. Search for **Convert Sales Lead** and click **Add Privilege to Role**.
5. On the Data Security Policies page, click **Create Data Security Policy** and enter these values.

Data Security Policy Field	Value
Policy Name	Custom Grant on Sales Lead
Start Date and End Date	Enter your desired dates.
Database Resource	Sales Lead
Policy Description and Condition Names	See table below.
Data Set	Select by instance set
Actions	Convert Sales Lead

For policy descriptions and condition names, review the ones listed below and pick the ones you need.

Policy Description	Condition Name
Custom Partner sales representative can convert sales lead where they're the owner of the sales lead	Access the sales lead for table MKL_LM_LEADS where they're the owner of the sales lead
Custom Partner sales representative can convert sales lead where they're an administrator of the resource organization in the primary assignment of the owner	Access the sales lead for table MKL_LM_LEADS where they're an administrator of the resource organization in the primary assignment of the owner
Custom Partner sales representative can convert sales lead where they're a resource in the territory assigned to the sales lead	Access the sales lead for table MKL_LM_LEADS where they're a resource in the territory assigned to the sales lead
Custom Partner sales representative can convert sales lead where they're a resource in the lead sales team with full access	Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team with full access

Policy Description	Condition Name
Custom Partner sales representative can convert sales lead where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team	Access the sales lead for table MKL_LM_LEADS where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team

6. Navigate to the summary step and confirm that you can see the new function security policy and any new data security policies that you added.
7. Click **Save and Close**.
8. Confirm that these two ESS jobs are scheduled to run:
 - Import User and Role Application Security Data
 - Retrieve Latest LDAP Changes
9. Confirm that the Convert action is available in the Edit Lead page layout that's active for the custom partner role. You can check this in Application Composer.

To test your changes, sign back in as a partner user to try to convert a lead to an opportunity.

Additional Setup Steps

Additional setup steps may be required, depending on your business needs, as described below. To perform these setup steps, sign in to the Setup and Maintenance work area as a user with Application Implementation Consultant or Sales Administrator role. Use the Lead Management offering, with Sales Leads as your functional area.

The following table shows the task names and the specific changes to make for each task to configure leads for channel and partner roles. These tasks include creating assessment templates, configuring profile options for the assessment templates and copy map, and configuring assignment rules.

Task Name	What You Need To Do
Create assessment templates and set profile option for assessment templates	<p>Create assessment templates: Manage Sales Lead Assessment Template</p> <p>Set the following profile option: Advanced Lead Qualification Enabled - Indirect Leads. Specify the default sales lead assessment template to be used in lead qualification for leads with the Sales Channel set to Partner. The default value is blank.</p>
Set copy map profile options	<p>Profile display name: Partner Lead to Opportunity Mapping</p> <p>Change this value if you have customer-defined field mapping for partner lead conversion that differs from the default mapping. This applies for both partner and direct sales leads. The default value is Copy Lead To Opportunity Map.</p>
Manage lead assignment rules	<p>Ensure that automated lead assignment to partners is set up. If using territory-based assignment, you must set up Partner territories and Channel Sales Manager territories. See the territories topics for more information on territories setup.</p>

Manage Actionable Email

If actionable email has been enabled, brand owners and channel companies can automatically notify a partner user when they assign that partner to a lead.

Their partner user or users receive an email notification about the lead if they haven't previously accepted the lead, and they can accept or reject the lead directly from the email notification.

Whether a partner user accepts or rejects the lead directly from the email notification or from the Lead pages, the lead is handled in the same manner. If you have implemented your own logic for how to process the accepted or rejected lead, it will execute as it would for other leads.

Channel managers can:

- configure which partners receive the email notification about the lead.
- add partner users to a lead sales team.
- send email notifications to one or more partner users when a partner company or a partner contact is assigned to a lead.
- assign leads in several ways:
 - Manually - add a partner to a lead and the partner administrator is added to the lead sales team.
 - Directly - add one or more partner users to the lead sales team. The partner users can be from different partner companies.
 - Automatically - associate partner territories to the lead where each territory belongs to one partner.
 - Automatically - assign one or more partner users to the lead sales team.

Note: By default, actionable email is not enabled. This feature must be enabled before partners can accept or reject leads from email notifications.

Configure Lead Notification for Partner Users Only

Sales administrators and application implementation consultants can use these steps to configure lead notification for partner users only when the partner is assigned to a lead.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From Navigator, click Setup and Maintenance.
3. Search for and select the following profile option: Use Default Lead Notification Process
4. Change the value for this profile option from No to Yes, and save the change.

Now, when channel managers assign a lead to a partner user, either manually or by rule based assignment, an email notification goes out to the specified partner user. However, if that partner user is part of a lead sales team, internal sales representatives who are also part of that lead sales team are not notified of the lead.

Configure Lead Notification for Partner Users and Sales Representatives

Sales administrators and application implementation consultants can use these steps to configure a lead notification to go out to both the partner and to any sales representatives who are also on the partner's sales lead team when that partner is assigned to a lead.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.

2. From Navigator, click **Setup and Maintenance**.
3. Search for and select the task you use to determine who is notified during lead assignment.
4. Remove the "Partner Contact Equals Y" filter in the rule, and save the change.

Now, when channel managers assign a lead to a partner user, either manually or by rule based assignment, an email notification goes out to the specified partner user. If that partner user is part of a lead sales team, internal sales representatives who are also part of that lead sales team are also notified of the lead.

Configure Lead Notification for Sales Representatives Only

Sales administrators and application implementation consultants can use these steps to configure a lead notification to go out to both the partner and to any sales representatives who are also on the partner's sales lead team when that partner is assigned to a lead.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From Navigator, click **Setup and Maintenance**.
3. Search for and select the task you use to determine who is notified during lead assignment.
4. Change the value for the filter "Partner Contact Equals Y" from "Y" to "N", and save your work.

Now, when channel managers assign a lead to a partner user, only the internal sales representatives who are also part of the partner user's lead sales team are notified of the lead.

Configure Deal Registrations

Configure Deal Registration Assignment Rules

The Business Process Management (BPM) flow invokes the preconfigured assignment workflow for deal registration. The assignment workflow cannot be run in an ad-hoc fashion or through any other means like an ESS job or a web service call.

Assignment identifies resources to be added to deal team who can later be processed to evaluate approvers for the deal registration. The resources identified by Role-Based Assignment or Territory-Based Assignment (RBA/TBA) serve as the initial pool of resources who can be made approvers for the deal registration. You can turn off RBA/TBA and replace it with an exclusively Human Workflow Rules based implementation of approver identification. However RBA/TBA provide for a rich capability of identifying approvers by way of writing rules based on deal, deal product work objects, and resource or territory candidate objects.

If you want to use the preconfigured MklDealsApprovalTask Human Task, you do not need to configure assignment rules. However, if you choose to use Rule-Based Assignment or Territory-Based Assignment, then you must create your own assignment rule group, your assignment rules. You select the value corresponding to the type of assignment you want to use for the MKL_DEAL_DEFAULT_ASGN_MODE profile option, then you select the rule group you created as the value for either the MKL_DEAL_RBA_RULESETGROUP or the MKL_DEAL_TBA_RULESETGROUP profile option depending on which type of assignment you want to use

Configure Assignment Rule Profile Options for Deal Registration

Sales Administrators and Application Implementation Consultants can use these steps to configure their deal registration assignment rule profile options for Rule-Based Assignment:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From Navigator, click **Setup and Maintenance**.

3. Search for the **Manage Profile Options** task.
4. Click the Go to Task icon for Manage Profile Options.
5. Ensure the profile options are set as shown in the following table.

Profile Option Name	Value to Select
MKL_DEAL_DEFAULT_ASGN_MODE	Rules-based Assignment Only/ORA_RBA
MKL_DEAL_RBA_RULESETGROUP	(Select the name of the rule set group you created)
MKL_DEAL_TBA_RULESETGROUP	NULL

6. Save your work.

Configure Assignment Rules for Deal Registration

Sales Administrators and Application Implementation Consultants can use these steps to configure their deal registration assignment rules:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From Navigator, click **Setup and Maintenance**.
3. Search for each of the following tasks:
 - Manage Sales Lead Assignment Rules
 - Manage Sales Lead Assignment Objects
4. For each task, click the Go to Task icon.
5. If you are using Rule-Based Assignment only, ensure the active rule set Category is associated to the profile option MKL_DEAL_RBA_RULESETGROUP.
6. Save your work.

Set Up Reason Code Lookups for Deal Registration

If you want your partner resources to be able to reject or return deal registrations, then you must add reason codes for the reject and return actions.

Sales administrators and application implementation consultants can use these steps to set up reason code lookups for deal registration:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. In the **Settings and Actions** menu, click **Setup and Maintenance**.
3. In the **Search Tasks** field search for and select the **Manage Deal Registration Lookups** task.

4. Ensure your lookups are configured as shown in the following table.

This table lists the lookup type, internal name, lookup, and lookup code for deal registration lookups.

Lookup Type	Lookup Type Internal Name	Lookup	Lookup Code
Deal Registration Status	ORA_MKL_DEAL_REG_STATUS	Approved	ORA_APPROVED
		Draft	ORA_DRAFT
		Expired	ORA_EXPIRED
		Failed	ORA_FAILEDORA_PENDING_APPROVAL
		Pending Approval	ORA_REJECTED
		Rejected	ORA_RETURNED
		Returned	ORA_WITHDRAWN
		Withdrawn	
Deal Registration Reject Reason	ORA_MKL_DEAL_REJECT_REASON	Duplicate	ORA_DUPLICATE
		Ineligible Customer	ORA_INELIGIBLE_CUSTOMER
		Ineligible Partner	ORA_INELIGIBLE_PARTNER
Deal Registration Return Reason	ORA_MKL_DEAL_RETURN_REASON	Incomplete Customer Information	ORA_INCOMPLETE_CUSTOMER_INFO
		Ineligible Product	ORA_INELIGIBLE_PRODUCT
		Insufficient Quantity	ORA_INSUFFICIENT_QUANTITY

5. Save your work.

Set Up Deal Registration for Opportunity Conversion Mapping

Sales administrators and application implementation consultants must set up a map to determine how the deal registration values are converted to opportunity values.

Use these steps to set up the deal registration to opportunity map:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. In Navigator, click **Setup and Maintenance**.
3. Click the Tasks icon and click Search.
4. Search for and select the **Manage Sales Lead Administrator Profile Values** task.

5. Search the profile options to check which copy map is being used for conversion.
6. You can compare the active map with the preconfigured map by navigating to Application Composer, Sales, Copy Map, Deal to Opportunity Conversion and clicking **View Original**.
7. Check the active map for the following:
 - Issues with incorrect expression.
 - Duplicate entries.
 - Missing entries due to corruption.

Note: The copy map must be correct for conversion to work.

8. Save your work.

Configure Dynamic Layouts for Deal Registration

To configure deal registrations for use with partner relationship management, you must perform several configuration procedures. Some of these procedures may include:

- Modifying page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields

The exact tasks depend upon your unique business requirements.

Note: Modification tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on modifying the applications, see the Extending Sales guide.

Create Your Own Page Layout for Deal Registrations

Following is a sample procedure for creating your own layouts for the Deal Registrations pages for different user types.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. Navigate to Deal Registration pages: Select **Standard Objects**, Deal Registrations, and then click **Pages**.
3. Ensure that the **Simplified Pages** tab is active.
4. In the **Creation Page Layouts** section, make a copy of the Default Layout
5. Edit the **Fuse Deal Create** page. Add the following fields:
 - Partner
 - Partner Level
 - Partner Type
6. Save your changes.
7. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Channel Account Manager
 - Channel Operations Manager

- Channel Sales Manager
- 8. Next, create a new layout for the Edit Deal Registrations page. Ensure you are in the **Simplified Pages** tab. In the **Details Page Layouts** section, make a copy of the Default Layout.
- 9. In the Summary subtab, edit the **Summary** region.
- 10. Add the following roles:
 - Partner
 - Partner Level
 - Partner Type
- 11. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the **Role** list of values to associate the following user roles with the layout:
 - Channel Account Manager
 - Channel Operations Manager
 - Channel Sales Manager
- 12. Make sure the new layout is above the Default Layout in the table.
- 13. Test your changes by signing in as a user with one of the roles you associated with the layout.
- 14. Publish the sandbox.

To modify the layout for channel account manager and channel sales manager:

1. Make a copy of the appropriate layouts you created or modified above and:
 - Remove **PartnerOwnerName** in the Summary region.
 - In the Sales Team subtab, add the **Organization** field to the Summary Table and move it directly below Team Member.
2. Make sure the new layout is above the Default Layout in the table but below the partner user layout.

Rename Field Labels

You can rename field names from their default values to new values, as needed.

1. In Application Composer, navigate to **Standard Objects: Deal Registrations: Fields**.
 - a. Click the **Standard** tab.
 - b. For each field to be renamed, select the row, and click **Edit the Selected Field**.
 - c. Under **Appearance**, edit the display labels. Following is a sample of the fields you may want to modify.

Default Field Name	Modified Display Label
PartnerLevelMeaning	Partner Level
PartnerOwnerName	Channel Manager
Primary Partner	Partner

- d. Save your changes.

Add the Browse Catalog Button to Deal Registration Pages

Sales administrators can add the Browse Catalog button to the Deal Registration edit pages so that channel and partner users can browse the sales catalog and view the product hierarchy directly from the Deal Registration pages.

Use these steps to add the Browse Catalog button to the Edit Deal Registration summary page.

1. Sign in with your Sales Administrator credentials.
2. Ensure you are in a sandbox.
3. From the Navigator, click **Application Composer**.
4. On the Application Composer page, select **Sales** from the Object Tags.
5. From the list of standard objects, expand **Deal Registration** and click **Pages**.
6. In the Details Page Layouts region, duplicate the Standard layout and provide a name for your modified layout.
7. Click **Save and Edit**.
8. On the Details Layout page, scroll down to the Products region, and click the **Edit** icon.
9. From the list of available buttons in the Configure Detail Form: Buttons and Actions region, select **Browse Catalog** and move it over to the Selected Buttons list.
10. Click **Save and Close**.
11. On the Details Layout page, click **Done**.
12. Verify that you can see the Browse Catalog button on the Edit Deal Registration Summary page for a draft deal registration.
13. Publish your sandbox.

Configure Opportunities

User Access to Partner Opportunities

To gain access to the Partners tab and the Primary Partner field in the Edit Opportunity page, users must have the Manage Opportunity Partners privilege included in their job role.

Note: If an administrator used Application Composer to remove the FusePartnerName field from the Edit Opportunity layout, then users will not see the Partners tab and the Primary Partner field even if their job role includes the Manage Opportunity Partners privilege.

Duties and Jobs With the Privilege

By default, the Manage Opportunity Partners privilege is assigned to the following three duties:

- Opportunity Channel Administration
- Channel Account Manager
- Channel Sales Manager

By default, these duties are part of the following jobs/duties:

- Sales Administrator

- Customer Relationship Management Application Administrator
- Channel Administration
- Channel Operations Manager
- Channel Account Manager
- Channel Sales Manager

Configure MDF

Marketing Development Funds (MDF)

Brand owners understand that using partners to augment their marketing efforts increases sales. When brand owners offer partners a simple way to request, use, and claim marketing development funds, the partners become more committed to implementing effective marketing activities that result in increased sales.

Market Development Funds (MDF) give brand owners the ability to make funds available to partners, so the partners can market the brand owner's products in specific geographical areas, or so the partners can market its brand in general. MDF enables brand owners to manage the full cycle associated to marketing development funds, from creating and managing MDF budgets to managing MDF requests and claims submitted by partners.

Channel Operations Managers can create an MDF budget for a specific partner or for multiple partners located in one or multiple countries. Activated MDF budgets can be associated to MDF requests submitted by eligible partners. Partner users (or channel users on behalf of the partners) create and submit MDF requests. When the MDF request is approved, the partner can implement the marketing activity. After the marketing activity has been implemented, partner users (or channel users on behalf of the partners) submit one or more MDF claims so they can be reimbursed for their marketing expenses. When an MDF claim is approved, the approved amount is expected to be paid in one or more installments. MDF claim settlements store the information about each of these payments.

How Marketing Development Fund (MDF) Objects Work Together

To understand Marketing Development Funds (MDF), you must understand how each of the MDF objects fit together in the MDF life cycle. The MDF objects are as follows:

- MDF Budgets, enable brand owners to create and manage MDF budgets that eligible partners can use.
- MDF Requests, enable partner users to request funds to implement strategic marketing activities.
- MDF Claims, enable partner users to submit claims seeking reimbursement for the marketing expense incurred.
- MDF Claim Settlements, enable partner users to track their claim payment progress and enables channel users to capture claim payment information.

MDF Budgets

Channel operations managers can use the Budgets tab to view all MDF budgets they have permission to see and to create MDF budgets that a specific partner or a group of partners in one or more countries can use.

Note: By default, partner users can't access MDF budgets. To provide access, assign the MKT_VIEW_MARKETING_BUDGET_PRIV privilege to the desired partner roles.

Each MDF budget has the following features:

- It has a start and an end date.
- It has a request deadline, which is the last day partners have to submit requests against the budget.
- It has a claims deadline, which is the last day to submit claims against the approved requests on the budget.
- It enables channel managers to specify the type of marketing activities for which partners can use the budget, such as advertising or events.

Channel managers can do the following with MDF budgets:

- Control which internal channel users have view or edit access to the budget.
- Activate and inactivate the budget.
- View and manage approved requests associated with the budget.
- View and manage approved or rejected claims associated with the budget.
- Track the funds available in the budget.
- Add notes about the budget.

Note: Any team member of the budget team with the appropriate access can inactivate an active budget.

The following table lists the attributes that are calculated or recalculated in an MDF budget, and what triggers their calculation:

Attribute Display Name	Calculation Trigger
Available Budget	This attribute is calculated whenever the following happens: <ul style="list-style-type: none"> • The MDF budget is activated. • An MDF request associated with the budget is approved. • An MDF request associated with the budget is terminated. • More funds are added to the budget.
Total Budget	This attribute is calculated whenever the following happens: <ul style="list-style-type: none"> • The MDF budget is activated. • More funds are added to the budget.
Total Requests	This attribute is calculated when an MDF request associated with a budget is approved or rejected.
Approved MDF Requests	This attribute is calculated when an MDF request associated with a budget is approved or rejected.
Rejected Fund Requests	This attribute is calculated when an MDF request associated with a budget is approved or rejected.
Total Unclaimed Requests	This attribute is calculated when an MDF request associated with a budget is approved or rejected.

Attribute Display Name	Calculation Trigger
Submitted Claims	This attribute is calculated when an MDF claim associated with a budget is approved or rejected.
Approved MDF Claims	This attribute is calculated when an MDF claim associated with a budget is approved or rejected.
Rejected MDF Claims	This attribute is calculated when an MDF claim associated with a budget is approved or rejected.
Pending MDF Claim Amount	This attribute is calculated when an MDF claim associated with a budget is approved or rejected.

Note: MDF claims are associated with MDF budgets through MDF requests.

MDF Requests

Partners can create and submit MDF requests to get approval for marketing funds. Partner sales managers can save a request in draft status, which enables them to make updates before submitting the request for approval.

When the request is submitted for approval, the partner owner is notified of the submission. The partner owner has the option to return, withdraw, reject or approve the request. If a request is returned, rejected, or withdrawn, then the submitter of the request is notified by email and system notifications. Partner users on the request team with edit or full access can resubmit returned or withdrawn requests.

If the partner owner approves the request, email and system notifications are sent to all users with the channel operations manager role for final approval. A channel operations manager can also withdraw, return, reject, or approve the request. The submitter is also notified in these instances. If the request is withdrawn or returned, then partner users with the right access can resubmit the request. (Rejected requests can't be resubmitted.) A request must have an associated MDF budget for the approval to be successful. Anyone designated as an approver can associate a budget with the MDF request.

Note: To update budget details on a request in Draft, Returned or Withdrawn status, approvers must first have the Update Marketing Fund Request Budget Details privilege (MKT_UPDATE_MARKETING_FUND_REQUEST_BUDGET_DETAILS_PRIV). The Channel Account Manager role automatically has this privilege. If you're not using this standard role, then add this privilege to the custom roles that you're using for approvers.

When the channel operations manager approves the request, the request status changes to Approved and the partner can begin the marketing activity. Anyone designated as an approver can also add approval details to the request (Approved Percent, Reject Reason, Return Reason, and Approver Comments).

Note: To update approval details on a request, approvers must first have the Update Marketing Fund Request Approval Details privilege (MKT_UPDATE_MARKETING_FUND_REQUEST_APPROVAL_DETAILS_PRIV). The Sales Administrator, Channel Operations Manager, Channel Sales Manager, and Channel Account Manager roles automatically have this privilege. If you're not using these standard roles, then add this privilege to the custom roles that you're using for approvers.

Channel users can do the following with MDF requests:

- View all requests they have permission to see.
- Create and submit requests on behalf of the partners.
- Add activities and notes to the request.
- Permit other partner and channel users to view or manage the request.
- View MDF claims on the request if they're on the claim team.

Partner sales managers and partner administrators can do the following with MDF requests:

- View all requests they have permission to see from their partner company.
- Create and submit requests.
- Add activities, appointments, tasks, and notes to the request.
- Permit other members of the partner company to view or edit the request.
- View MDF claims on approved requests.

The following table lists the attributes that are calculated or recalculated in an MDF request, and what triggers their calculation:

Attribute Display Name	Calculation Trigger
Approved Amount	This attribute is calculated when the MDF request is approved.
Approved Claim Amount	This attribute is calculated when an MDF claim associated with a request is approved.
Available Amount	This attribute is calculated whenever the following happens: <ul style="list-style-type: none">• The MDF request is approved.• An MDF claim associated with the MDF request is terminated.

MDF Claims

To be reimbursed for the marketing expenses incurred, partners can submit one or more MDF claims against an approved MDF request.

Partner sales managers or partner administrators can track the progress of their claims from submission to payment. They can view either all claims submitted by their partner company or just claims associated to a specific request. Partner administrators can see all requests and claims for the enterprise. Channel users can track the progress of their partners' claims from submission to payment. They can see a list of all the MDF claims submitted by partners. Channel users can also access MDF claims from a specific MDF request. On behalf of a partner, a channel user can create and submit MDF claims against any approved MDF request.

When submitted, the claim goes through a two-level approval process. The partner owner is the first approver and a channel operations manager is the final approver. Approvers can return, withdraw, reject, or approve a claim. The submitter of the claim is notified by email and system notifications. Partners can resubmit returned or withdrawn claims but not rejected claims. When the channel operations manager approves the claim, its status becomes Approved and the approved amount on the claim is expected to be paid in the form of one or more MDF claim settlements.

MDF Claim Settlements

The approved amount on the MDF claim is paid in one or more installments, called MDF claim settlements. MDF claim settlements capture the information about each payment, and they're managed by channel users.

Partner users can view all claim settlements associated with an approved MDF claim on the Claim Settlements tab.

The following table lists the attributes that are calculated or recalculated in an MDF claim, and what triggers their calculation:

Attribute Display Name	Calculation Trigger
Approved Amount	This attribute is calculated when the MDF claim is approved.
ClaimSettledAmount	This attribute is calculated when a settlement associated with an MDF claim is complete.
Liability Amount	<p>This attribute is calculated whenever the following happens:</p> <ul style="list-style-type: none">• The MDF claim is approved.• A settlement associated with an MDF claim is complete.

Critical Choices for Implementing MDF for Channel Sales

The Marketing Development Fund feature (MDF) is optimized for partner users. To optimize the user experience for channel managers, you must modify the relevant fields and pages for the relevant roles with Oracle Application Composer and Oracle Page Composer.

Activity management pages are optimized for direct sales. You must modify the activities pages to expose MDF attributes for customers offering MDF programs to their partners.

You must make the appropriate decisions during implementation for the following features that drive MDF request and MDF claim approvals:

- Approval routing rules
- Approval process flows

MDF Requests and MDF Claims Approval Routing Rules

MDF requests and MDF claims submitted by partners must be assigned to appropriate personnel in your organization so they can get access to MDF requests or claims based on their roles. For example, people who are approvers must be assigned properly so they can view, approve, reject, or return an MDF request or an MDF claim.

By default, commonly needed approval routing rules for MDF requests and MDF claims are provided. However, you can create your own approval workflow to route MDF requests and MDF claims to the correct approvers.

MDF Request and MDF Claim Approval Process Flows

The default MDF approval processes should meet most MDF request and MDF claim use cases. However, if you need to modify one or both flows, you can do so by editing the included human task flows, using the existing business flows as

your templates. The templates are: FundRequestApprovalHumanTask for MDF requests and ClaimApprovalHumanTask for MDF claims.

Use these steps to edit the existing business flow templates in the Worklist application.

1. Sign in with your sales administrator credentials.
2. Click the Notification bell icon in the global header.
3. Click More Details, and then click Customer Relationship Management.
4. From the user_name drop-down list, select Administration - **Task Configuration**.
5. Perform the following steps as needed:
 - a. For MDF Requests
 - i. Search for Fund% in the search field in the left panel.
 - ii. Click the Edit icon in the left panel.
 - iii. In the Assignees tab, and click inside the MDF Request Stage One Approvers box.
 - iv. Click the FundRequestApproval business rule.
 - v. Make the changes you need to fit your business needs.
 - b. For MDF Claims
 - i. Search for Claim% in the search field in the left panel.
 - ii. Click the Edit icon in the left panel.
 - iii. In the Assignees tab, and click inside the MDF Claim Stage One Approvers box.
 - iv. Click the ClaimRequestApproval business rule.
 - v. Make the changes you need to fit your business needs.
6. Save your changes.

Change the Number of Stages in an Approval Flow

MDF offers up to five approval stages, with both serial and parallel approvals on each stage for both MDF requests and MDF claims. If you need to add additional approval stages to the MDF request or MDF claim flow, follow these steps:

1. Click the MDF Request or MDF Claim Approval Stage Three box.
2. Deselect the Ignore Participants check box.
3. Click Advanced.
4. Deselect the Ignore Stage check box.
5. Click MDF Request or MDF Claim Approval Stage Three Approvers.
6. Click Advanced.
7. Deselect the Ignore Participants check box.
8. Save your changes.

To remove stages, you can create rules that skip approval levels. For example, use these steps if you want to have one approval stage for MDF claims:

1. Create a new rule that skips stage one.
2. Move this rule so it's the first rule in the UI.
3. Inactivate the first seeded rule.

Configure Profile Options and Lookups for MDF

Before you can use Marketing Development Funds (MDF) with channel sales, you must configure some profile options and lookups.

By default, the corporate currency is set to US dollar. If your company uses a different corporate currency, then you must select that currency.

Note: You must change this profile option at the site level.

To set up your preferred currency, you must configure a profile option for the following:

- User Preferred Currency - determines the currency type you prefer to use.

You must also configure standard lookups for the following MDF objects:

- MDF Budgets
- MDF Budget Team
- MDF Requests
- MDF Request Team
- MDF Claim
- MDF Claim Team
- MDF Claim Settlements

Set the Profile Option Level

Use these steps to set the level at which you're changing your profile options.

1. Sign in with your Sales Administrator credentials.
2. In the Navigator, click **Setup and Maintenance**.
3. Search for and select the **Manage Administrator Profile Values** task.
4. Search for the **ZCA_COMMON_CORPORATE_CURRENCY** profile option code.
5. Set the profile option at the **Site** level.

Configure Your Preferred Currency

Use these steps to configure the currency profile option for MDF.

1. Sign in with your Sales Administrator credentials.
2. In the Navigator, click **Setup and Maintenance**.
3. Search for and select the **Manage Administrator Profile Values** task.
4. On the Manage Administrator Profile Values task page, search for and set the following profile option codes:
The following table shows the profile option code (FND_CURRENCY) and display name (User Preferred Currency) of the profile option you use to configure your preferred currency.

Profile Option Code	Display Name
FND_CURRENCY	User Preferred Currency

Profile Option Code	Display Name

5. Save your changes.

Configure Lookups for MDF Objects

Use these steps to configure the standard lookups for MDF objects.

1. Sign in with your Sales Administrator credentials.
2. In the Navigator, click **Setup and Maintenance**.
3. Search for and select the **Manage Standard Lookups APPLICATION MKT** task.
4. Configure the following lookups:

The following table shows the lookups to configure for each MDF business object, including MDF Budgets, MDF Budget Team, MDF Requests, MDF Request Team, MDF Claims, MDF Claim Team, and MDF Claim Settlements.

MDF Object	Lookups to Configure	Description
MDF Budgets	ORA_MKT_MDFBUDGET_TYPE ORA_MKT_MDFBUDGET_CAT MKT_MDF_BUDGET_STATUS ORA_MKT_MDF_BUDGET_RECORD_SET	Indicates the type of the MDF Budget. Indicates the usage category for the budget funds. Indicates whether the budget is active for use. Indicates which record sets searched for MDF budgets.
MDF Budget Team	ORA_MKT_MDFBUDGET_FUNCTION ORA_MKT_MDFBUDGET_ACC	Indicates the business role that the team member plays on the MDF Budget. Indicates the access level of the MDF budget team member.
MDF Requests	MKT_MDF_FUNDREQ_STATUS ORA_MKT_MDFREQUEST_TYPE ORA_MKT_MDF_RECORD_SET	Indicates the approval status for the MDF request. Indicates the type of MDF request. Indicates the record set used to search for a specific set of MDF requests.
MDF Request Team	ORA_MKT_MDF_ACCESS_LVL ORA_MKT_MDFREQUEST_FUNC	Indicates the access level of a team member to the MDF Request.

MDF Object	Lookups to Configure	Description
		Indicates the business role the team member plays on the MDF Request.
MDF Claim	MKT_MDF_FUNDREQ_STATUS ORA_MKT_MDF_CLAIM_RECORD_SET	Indicates the approval status for the MDF request. Indicates the record set used to search for MDF claims.
MDF Claim Team	ORA_MKT_MDF_ACCESS_LVL ORA_MKT_MDFREQUEST_FUNC	Indicates the access level of a team member to the MDF Claim. Indicates the business role the team member plays on the MDF Request.
MDF Claim Settlements	MKT_MDF_CLAIM_STLMNT_TYPE ORA_MKT_MDFCLAIMSETT_TRANS MKT_MDF_CLAIM_STLMNT_STATUS	Indicates how the claim was financially settled. Indicates the type of method used to settle the transaction. Indicates whether the data for a claim settlement is complete.

5. Save your changes.

Configure MDF Audit Reporting

The audit of MDF objects, such as MDF Budgets, MDF Requests, and MDF Claims requires some configuration for channel sales. You must determine who can configure MDF audit and who can run and view the MDF audit report.

For example, you can select CRM application administrators to manage the MDF audit policies, and sales administrators or channel operations managers to build, run, and export the audit report for MDF.

The tasks to configure access to the audit setup UI are:

- Create the Duty Role to Manage Audit History
- Create the Policy to Manage Audit History
- Map Job Roles to Manage Audit History

The tasks to configure access to the audit reporting UI are:

- Create the Duty Role to View Audit History
- Create the Policy to View Audit History
- Map Job Roles to View Audit History

For more information and detailed steps to perform these tasks, see the Understanding Audit Policies chapter of the Implementing Sales guide.

Select the MDF Objects to be Audited

Users with the job roles configured in the previous tasks can follow these steps to select which MDF attributes are audited.

1. Sign in with the determined job role credentials, such as CRM Application Administrator if that job role was granted access.
2. From the Navigator, select **Setup and Maintenance**.
3. In the Setup field, select **Sales**.
4. From the list of functional areas for Sales, select **Sales Foundation**.
5. In the Show field, select **All Tasks**.
6. Search for and select the **Manage Audit Policies** task.
7. Click **Configure Business Object Attributes**.
8. From the Product list, select **Marketing**.
9. You should see the following objects under MDF Audit:
 - a. MDF Budget
 - i. MDF Budget Countries
 - ii. MDF Budget Team
 - b. MDF Request
 - i. MDF Request Team
 - c. MDF Claim
 - i. MDF Claim Team
 - ii. MDF Claim Settlement
10. In the Audit column, you can click **Audit Top Node** to activate auditing for all objects in the marketing hierarchy, including all MDF objects.
11. You can click **MDF Audit** to activate auditing for all objects in the MDF hierarchy.
12. You can select the check box for each individual object to activate auditing for that object.

In the Attributes region, you can see a list of all attributes for the MDF object you selected.
13. Under Audited Attributes, click the Create icon to show the Select and Add Audit Attributes dialog, where you can add attributes to or remove attributes from the list.
14. Repeat the previous step for each object you want to add or remove audit attributes.
15. Click **Save** or **Save and Close** to save your work.

Example of Configuring MDF Pre-Approval Validation

Since brand owners don't have identical approval processes, MDF provides a flexible and quick way to create pre-approval validations that meet your specific business needs. If your business processes change, you're able to change your validations accordingly.

Sales administrators can use Application Composer to create customer-defined validations that run before an approver takes action on a submitted MDF request or MDF claim. In this example, a sales administrator for a brand owner creates a validation that ensures MDF requests can only be approved if a budget is associated to the request. When this

validation is activated, approvers receive an error message when they try to approve a MDF request that doesn't have an associated budget.

Each human task action requires a separate validation. After you create the validation in Application Composer, you must create a profile option whose value is the name of the object function that will be invoked when the human task action executes. You can configure validations for the following human task actions:

- Return
- Approve
- Reject
- Withdraw

To create the pre-approval validation, sales administrators must:

- Create the validation in Application Composer as an object function under the MDF request object, server scripts link.
- Create a site level profile option with a value that's the same as the name of the object function that will be invoked.

Create and Configure the Validation

Use the following steps to create and configure a validation for MDF requests that ensures a MDF request can only be approved if a budget is associated to it.

1. Sign in with your sales administrator credentials.
2. Ensure that you're in a sandbox.
3. Navigate to **Application Composer**.
4. From the list of Standard Objects, select **MDF Request**.
5. Select **Server Scripts**, then select **Object Functions**, and click **Create**.
6. On the Object Function page, provide the following:
 - Function Name: type a name for the function, such as **validateMDFRequest**.
 - Return: select **String**.
7. In the Parameters area, click **Create** and provide the following:
 - Name: type a name for the parameter, such as **parameter**.
 - Type: **String**.

8. In the Function Body area, type the following:

```
def context = parameter?.tokenize(';'); // Replace 'parameter' with whatever parameter name is defined in
the object function, in this case it is 'parameter'.

def stage = context[1];

def participant = context[3];

def user = context[5];

if(BudgetId ==null && stage == 'SoaOLabel.RequestBudgetFundRequestApprovalStageTwo'){ // This condition
is on the second stage which is final stage for the seeded flow

return "A Budget must be associated to Fund Request before the final approval"; // Error message to be
shown on UI if the validation fails
```



```
}
```

```
return null; // Return null otherwise, which means the validation is successful.
```

9. Validate the script and click **Save and Close**.

Create and Configure the Profile Option

Use the following steps to create and configure the profile option for the previous validation.

1. Sign in with your sales administrator credentials.
2. Ensure that you're in a sandbox.
3. Navigate to **Setup and Maintenance**.
4. Search for and select **Manage Profile Options**.
5. Create a new profile option with the following values:
 - o Profile Option Code: MKT_FUNDREQUEST_APPROVE_VALIDATION_OBJFUNC (This is the code for Fund Request approve validation; the codes are predefined for object/action validation and must be defined exactly the same)
 - o Profile Display Name: Fund Request Approve Validation Object Function
 - o Application/Module: Marketing
 - o Start Date: Provide a start date for the validation.
6. Click **Save and Close**.
7. Select the **Enable** check box for the profile option at the Site level only and select the **Updatable** check box at the site level only.
8. Click **Save and Close**.
9. Test the validation by approving the FundRequest without providing the Budget. It should display the message what was returned in the groovy. Once you complete the testing you can publish the sandBox.

Expose the Approval History Subtab on MDF Pages

Viewing the approval history for MDF requests and MDF claims allows partners, channel managers, and other designated approvers to view approval details for the MDF requests and MDF claims that they have visibility into.

They can view such details as who took an action, as well as when and why the action was taken.

Approval history can be viewed either as a region on the MDF Request and MDF Claim Edit pages, or as a subtab on those pages.

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

Sales administrators can use the following steps to expose the Approval History subtab on the Edit pages for MDF requests and MDF claims.

1. Sign in with your sales administrator credentials.
2. Be sure you're in a sandbox.
3. In the Navigator, click **More...** and from the Tools list, click **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **MDF Claim**, and click **Pages**.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.

6. Type a new layout name and click **Save and Edit**.
7. Click the **Hide, Show, or Reorder Subtabs** icon.
8. Move **Approvals** to the **Selected Subtabs** column, and click **OK**.
9. In the Approvals region, click **Hide** to prevent this region from appearing to users.
10. Click **Done**.
11. Repeat these steps for MDF Requests.
12. Be sure that the layout status for your modified layout is **Active**.

Add Reject Reason, Return Reason, and Comments Fields to MDF Pages

Sales administrators can add Reject Reason, Return Reason, and Comments fields to MDF Request and MDF Claim pages so that channel organizations can better track the reasons why they reject or return MDF requests and MDF claims.

The reason values and comments provided by an approver are displayed in the approval history for the MDF request or MDF claim.

Sales administrators can add pre-approval validations to the MDF request and MDF claim objects that require approvers to provide a reject or return reason (either with or without comments) before they can take the reject or return action.

Sales administrators can use these steps to add Reject Reason, Return Reason, and Comment fields to MDF requests and MDF claim pages.

1. Sign in with your sales administrator credentials.
2. Be sure you're in a sandbox.
3. In the Navigator, click **More** and from the Tools list, click **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **MDF Claim**, and click **Pages**.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**.
7. In the Summary region, click the Edit icon.
8. Move **Reject Reason** and **Comments**, and **Return Reason** and **Comments** from the Available Fields column to the Selected Fields column.
9. You can use the arrows to reorder the fields in the Selected Fields column.
10. Click **Save and Close**.
11. Click **Done**.
12. Repeat these steps for MDF Requests.
13. Be sure that the layout status for your modified layout is **Active**.

Reassign Approver of MDF Claims and Requests

You can change the existing approver of an MDF claim and request on the BPM Worklist page.

Note: Your role must have the `ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB` privilege to be able to reassign approvers.

To change the existing approver of an MDF claim or request, do the following:

1. Sign in with your sales administrator credentials.
2. Click the **Notifications** (bell) icon on your application page.
3. Click **Show All** to open the Notifications page.
4. On the Notifications page, click **Worklist** to open the BPM Worklist page.
5. On the BPM Worklist page, click **Administrative Tasks**.
6. In the filter, select **Any** and search for the claim or request to which you want to assign a new approver.
7. Select the claim and click **Actions > Reassign**.
8. Fill in the fields on the Reassign page, as you see fit, and click **OK**.

Configure Partner Programs

Options to Enable Partner Programs

Channel organizations can either enable partner programs or not enable them. If channel organizations don't enable partner programs, then they can conduct business with partners without the partner needing to enroll into one of the channel organization's partner programs.

Partner Programs Enabled

If you enable partner programs:

- business intelligence, such as reporting and deals, can use partner program data.

Partner Programs Disabled

If you disable partner programs:

- business intelligence can't use program data, so you will not have reports based on program data
- programs aren't required for Lead Registration.

Note: If you don't enable partner programs, you should remove all job and duty roles for programs.

Configure Tiers for Partner Programs

You can use partner programs without extra configuration. However, if you want to use tiers in your partner programs, then you must do the following:

1. Expose the Tiers field and add it to the partner profile tab.
2. Replicate your current partner levels with the Tiers functionality.
3. Hide Partner Level.

Expose Tiers and Adding Them to the Partner Profile

Channel operation managers can use the following steps to expose tiers and add them to the partner Profile page.

1. For the Partner Standard Object, do the following:
 - Add the **Tier** field to the Create Partner page with the Partner: Create page configuration task.
 - Add the **Tier** field to the Profile tab with the Partner: Edit page configuration task.
2. Save your changes.

Replicate Your Current Partner Levels with Tiers

Channel operation managers can use the Tiers functionality to recreate your partner levels.

Hide Partner Level

Channel operation managers can use the following steps to hide the Partner Level field.

1. For the Partner Standard Object, do the following:
 - Hide the **Level** field on the Create Partner page with the Partner: Create page configuration task.
 - Hide the **Level** field on the Profile tab with the Partner: Edit page configuration task.
2. Save your changes.

Configure Partner Program Enrollments

Partner Program Enrollment

If the channel organization offers partner programs, a partner can enroll into a partner program and receive the benefits associated with that program.

Note: By default, partner users can't access partner program enrollments. To provide access, assign the ZPM_VIEW_PARTNER_PROGRAM_ENROLLMENT_PRIV and ZPM_APPLY_PARTNER_PROGRAM_PRIV privileges.

The process of enrolling into a partner program involves the following:

1. Select the partner program from a program catalog listed in the channel organization's application.
2. Confirm basic information like the organization, language, and so on.
3. Select a start date for the enrollment.

Note: The start date can't be past or prior to the active dates of the partner program. If partners don't specify a start date, the approval date of their enrollment becomes the start date for the enrollment.

4. Complete the questionnaire.
5. Accept the agreements associated to the partner program.
6. Review and submit the partner program enrollment request.

Related Topics

- [Synchronize User and Role Information](#)

Partner Program Enrollment Statuses

A partner program enrollment goes through many statuses during its life cycle.

It can have any of the following statuses:

- Approved
- Expired
- Renewed
- Rejected
- Terminated
- Pending Approval

Note: To expire a partner program enrollment, you must run either an ESS job or a WebService.

Approved

The enrollment is active and its end date is within the program's end date.

Expired

The enrollment end date is beyond the program's end date.

To expire a partner program enrollment, you must run the Partner Program Enrollment Expiration Job ESS job or a WebService with the following information:

- Service: PartnerProgramEnrollmentService
- Port: PartnerProgramEnrollmentServiceSoapHttpPort
- Operation:
 - expireProgramEnrollment
 - expireProgramEnrollmentAsync

Renewed

The partner has renewed the enrollment.

Rejected

The enrollment request was rejected. Approvers can reject or approve an enrollment at their discretion based on the contract, responses to questionnaire, and so on.

Terminated

The enrollment was terminated. Termination can occur at the supplier's discretion or when a program is decommissioned.

Pending Approval

The partner has submitted a request for enrollment, but the enrollment hasn't yet been approved.

Overview of Partner Program Enrollments Management

A partner program enrollment (called Enrollment) is the enrollment of a partner in a specific partner program. Active enrollment in partner programs can make partners eligible for benefits and incentives that come with the partner program.

A partner program, also called a channel partner program, is a business strategy that brand owners use to encourage partners to sell the brand owner's products or associated services. Channel partner programs can also feature specific incentive opportunities for sales of a specific product or service to help boost the brand owner's market reach with that product. These incentives can be additional margins on sales of a specific product, increasing based on volume of sales. Other incentives can include awards and industry recognition at brand owner events, extra marketing resources, or rewards to channel partner sales staff.

Channel operations managers can manage partner program enrollments for their partners by approving partner enrollment requests, enrolling partners in programs, editing enrollment summary information, and renewing partner enrollments. The most common tasks channel operations managers perform with enrollments are grouped together on the Actions menu.

Note: By default, partner users can't access partner program enrollments. To provide access, assign the ZPM_VIEW_PARTNER_PROGRAM_ENROLLMENT_PRIV and ZPM_APPLY_PARTNER_PROGRAM_PRIV privileges.

Configure Partner Assets

Add the Assets Subtab to Partner Pages

By default the Assets subtab does not appear on Partners detail pages. If you want to use assets functionality for your partner accounts, you must first add the Assets subtab to the Partners details page.

You must have the Sales Administrator job role to add the Assets subtab to Partners details page.

Note: The asset subtab does not appear for partners that are not set up as accounts and have a Sell To address, because only partners that are accounts with a Sell To address can own assets.

Sales administrators can use these steps to add the Assets subtab to the Partners details page.

1. Sign in with your sales administrator credentials.
2. Be sure you're in a sandbox.

3. In the Navigator, click **More** and from the Tools list, click **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **Partner**, and click **Pages**.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**.
7. Click the **Hide, Show, or Reorder Subtabs** icon.
8. Move **Assets** to the **Selected Subtabs** column, and click **OK**.
9. Click **Done**.
10. Be sure that the layout status for your modified layout is **Active**.

Your new modified layout (with the Assets subtab now included on the Partners details page or Edit Partner page) now displays in the table above the standard layout. You can add additional viewing conditions to the layout using this table. For example, you can indicate which roles can see your layout at run time. If you add no conditions, then this layout appears to everyone at run time instead of the standard layout. For more information, see the Dynamic Page Layouts topic in the Extending Sales guide.

Configure Partner Business Plans and Objectives

Options to Configure Partner Business Plans and Objectives for Channel Sales

Before configuring your partner business plans, you must decide if you want marketing development fund requests to be visible from the Business Plan interface.

You must also decide whether a user can choose a Business Plan in the Activities interface when an activity is created outside the context of a specific Business Plan.

Partner Business Plan Decision Points

The following table provides a list of the decision points and the impact of each decision, including being able to use Application Composer to create a relationship between business plans and MDF requests if you make the MDF Request tab visible on the Partner Business Plan pages, and being able to use Application Composer to expose the Business Plan field on the Activities pages if you want users to be able to select a business plan when they create or update an activity.

Decision	Potential Impact
Should MDF Requests be visible in the Partner Business Plan interface?	If yes, you can use Oracle Application Composer to create a relationship between the business plan and the MDF request, and you can add a new tab MDF Request tab to the Business Plan object.
Should users be able to select a partner business plan when creating or updating an activity that's outside the context of the specific partner business plan?	If yes, then you must use Oracle Application Composer to expose the standard Business Plan field on the Activities page.
Who needs access to business plans?	Business plans are visible to channel managers, partner administrators, and partner sales managers. If required, give business plan access to additional roles through the privilege ZCA_VIEW_SALES_BUS_PLN_PRIV.

Decision	Potential Impact
	Note: Even with access granted to business plans, partner users won't be able to access the Analytics subtab on the Edit Business Plans page.

Business Plan and Objective Setup Tasks

Use the following setup tasks for business plans and objectives:

1. In Setup and Maintenance, go to the following:

- Functional Area: Business Plans
- Show: All Tasks
- Tasks:

Task	Lookup Type	Lookup Meaning	Description
Manage Business Plan Classes	ORA_ZCA_BUS_PLAN_CLASS	Business Plan Class	Class of a business plan, such as Partner or Account, which represents the object for which a business plan was created.
Manage Business Plan Statuses	ORA_ZCA_BUS_PLAN_STATUS	Business Plan Status	The status of the business plan, such as draft or submitted to partner.
Manage Business Plan Types	ORA_ZCA_BUS_PLAN_TYPE	Business Plan Type	A category that indicates the type of a business plan.
Manage Business Plan Team Member Functions	ORA_ZCA_BUS_PLAN_TEAM_FUNC	Business Plan Team Member Function	The role of a business plan team member.
Manage Objective Types	Not applicable	Not applicable	Type of a business plan objective, such as amount or quantity.

2. If required, make any changes and then click **Save and Close**.

Configure Service Requests

Enable the Service Offering for Partner Service Requests

Service requests for Partner Relationship Management is included with shipped job roles, but the feature is not automatically available. Some setup is required. Customers must have the appropriate license before sales administrators can enable the Service offering for them.

Sales administrators must enable the Service offering before channel managers and partners can see the Service Request subtab or the Service Request infolet.

Use these steps to enable the Service offering.

1. Sign in with your sales administrator credentials.
2. On the Navigator, click **Setup and Maintenance**.
3. Click the **Service** card.
4. In the Administration section, click **Configure**.
5. Check the **Enable for Implementation** check box.
6. Click in the **Implementation Status** column, and from the Edit Implementation Status pop-up, select either the **In Progress** or **Implemented** option.
7. Click **Done**.

Modify the Service Request Page Layout for Channel Managers and Partner Users

Sales administrators can use Application Composer to modify the Service Request pages that appear when channel managers and partner users click the Service Request subtab.

The following suggestions show some ways in which sales administrators can modify the layout of the Service Request pages.

- You can clone the default layouts for the Create and Edit Service Request pages, and create a layout for internal users (Channel Account Managers) and another layout for external users (Partner Sales Representatives).
- For the internal user layout, you can add the Partner Account field to the Edit Service Request page and, optionally, you can remove the Account field (which refers to customer's company).
- For external partner roles, you can change the Partner Account field to read only.
- You can use Groovy script to add logic that automatically populates the Partner Account field and Primary Contact field with the name of the partner's company and the partner user's name (respectively) when an external partner role creates a Service Request.
- You can modify the Service Request list page columns to replace the Account column with the Partner Account column, and make this new layout available for appropriate channel sales roles.

Note: Some Service Request reference data such as Categories and Product Catalog are shared between the partner-facing and customer-facing flows. Customers implementing both use cases in the same application instance will have partners as well as customer-oriented users seeing the same categories and products in Service Requests.

Add the Service Request Subtab to Deal Registration Pages

The Service Request subtab appears on the Partner pages if the Service offering is enabled for the implementation; however, sales administrators can also add the Service Request subtab to Deal Registration pages.

Sales administrators can use these steps to add the Service Request subtab to Deal Registration pages.

1. Sign in with your Sales Administrator credentials.
2. Create your own Deal Registration dynamic choice list field on the Service Request object. Add Deal Registration as related object.
3. Add your new Deal Registration dynamic choice list field to the Edit Service Request page.
4. Add your own Service Request subtab to the Deal Registration (Create subtab, related object).
5. Add relevant Service Request fields, such as Reference Number, Title, Status, Priority, Account, Primary Contact, and Created (include drill-down on the Reference Number).
6. Click the **Show Create** check box.

Users can now see and click the **Create** button to create a new service request.

Configure Assessments

Configure Assessments for Partners

An assessment is a set of weighted questions and possible responses that get scored. Channel managers use assessments to evaluate the health of their partners at different stages, including recruitment, engagement, and delivery.

The Assessments subtab appears on the Partner pages by default for new customers; however, the Assessments subtab must be exposed on the Partner pages for existing customers by their application implementation consultants or sales administrators. In addition to exposing the Assessments subtab, there are several other options to consider when you configure assessments for partners. These options include the following:

- Using Page Composer to enable the Submit and Delete buttons so users with Edit or Full access to Assessments can submit and delete assessments.
- Using the Manage Partner Center Assessment Template task to create additional assessment templates, and add questions and responses to them. The only template available by default is Partner: Customer Inquiries.
- Enabling multiple assessments per template by setting the profile MOW_MULTIPLE_ASSESSMENTS_ENABLED to **Yes**. The default setting is **No**, but if channel managers want to perform periodic re-assessment of partners, then set this value to **Yes**.
- Enabling or disabling the Assessment subtab on Partner details page for Partner Administrators. By default, partner administrators can access the Assessments subtab; however, if you do not want partner administrators to view the channel organization's assessments, you can disable the Assessments subtab for partner administrators.

For more information and detailed steps to perform the previous tasks, see the Assessments topics in the Implementing Sales guide.

11 Configure Help

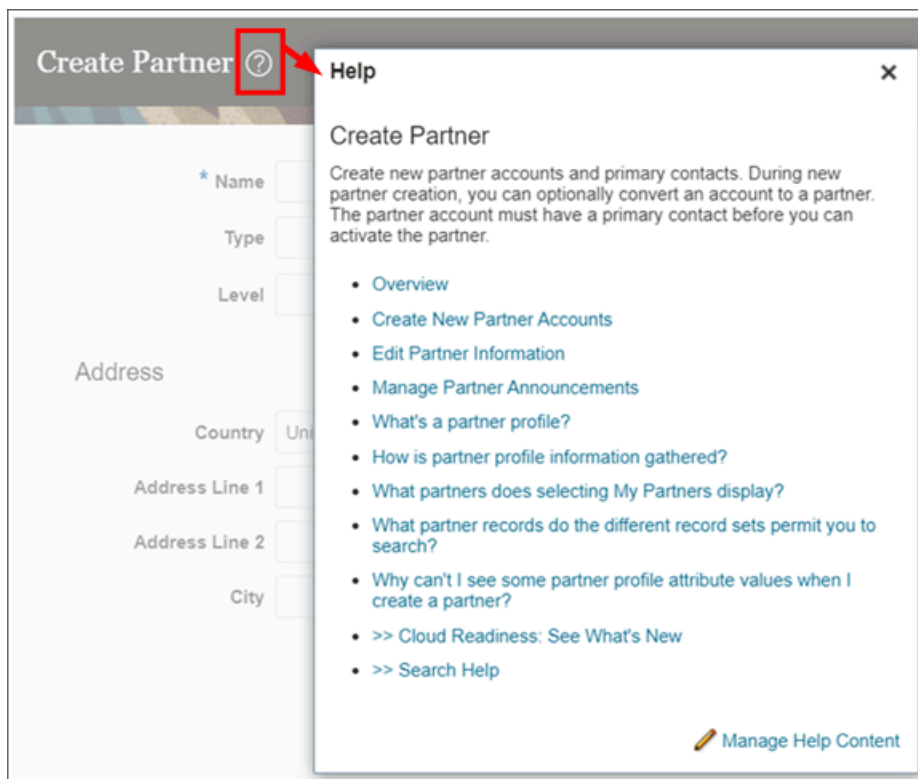
Overview of Configuring Help

Oracle provides contextual help right in the application, making it easier for users to find support, if needed, to complete their tasks. Contextual help is typically targeted at channel managers.

If you don't want partner users to see this help, then you have two options: you can either hide the actual help icons for all users, or you can keep the help that Oracle delivers for your channel users, but hide that help from your partner users.

What's a Help Icon?

Many application pages have help icons displayed at the top of pages or inside page regions. These icons are visible on a page by default. Users can click these icons to open help windows that contain help text, links, or both. Here's what a help icon and help window look like:



Scenario 1: Hide All Icons

The help icons that open help windows are automatically displayed at the top of pages and regions, but you can optionally hide them for all users. Do this if you don't want your channel users and partner users to access Oracle's Help Center.

To hide (or show) all help icons, use the Set Help Options task in the Application Extensions functional area in the Setup and Maintenance work area. For more information, see "Hide or Show Help Icons" in this chapter.

Scenario 2: Hide Help Links for Partners

On the other hand, maybe you want to keep the help that Oracle delivers for your internal channel users, but hide that help from your external partner users. You can do this by creating your own version of Oracle's content and using help security groups.

Let's look at an example of a help window that displays on the Deal Registration page. In this example, you want only channel users to see the help, not partner users.

1. First, enable the Help Content Management feature and also give people access to create and edit help. Once you do this, people can add company-specific help to help windows.

See "Set Up Help" and "Give People Access to Create and Edit Help" in this chapter.

2. Then, create a help security group that includes only the job roles for channel users.

Do this so that you can secure your new help content with this help security group. This means that only people with channel user roles can see the help.

See "Create Groups to Limit Access to Added Help" in this chapter.

3. Next, hide the original predefined help topics that you don't want partner users to see.

- a. Go to the page with the help window you want to modify, and click the help icon.
- b. In the help window, click the **Manage Help Content** link.
- c. In the Manage Help Content dialog box, you can hide links to the predefined help that you don't want partner users to see.

See "Determine Which Links Appear and in What Order" in this chapter.

4. Finally, create your own versions of those same topics. This is so that you can add the channel user help security group.

- a. Go to the page where you want to add help and click the help icon.
- b. In the help window, click the **Manage Help Content** link.
- c. In the Manage Help Content dialog box, click **Create**.
- d. Select the **Text** help type.
- e. Select the channel user help security group that you previously created. Only users with roles in the security group will be able to see the help.
- f. Set the status as Active if you want people to see your help in the help window.
- g. Enter the title, which is the text of the link in the help window.
- h. Enter your content in the text editor. Or you can click the **Source Code Editing Mode** icon to switch to an HTML editor.

In this example, simply copy the content from the original Oracle help topic (that you just hid) into the text editor. You're creating your own version of the Oracle help.

- i. Save your work.
- j. To check your work, click your link in the help window.

See "Add Your Content to a Help Window" in this chapter.

Related Topics

- [Manage All Added Help Content](#)

How You Manage Different Types of Help

You can edit the help content that comes with the application. You can also add your own help to help windows, for example to provide company policies. Let's look at the different types of help that you can manage.

Help Type	How You See This Help	How You Edit or Add to It
Fields and other UI elements	Help text appears when you hover over or click certain UI elements on the page.	You can edit this text using the User Interface Text tool, or add your own help text to buttons using Page Composer.
Help windows	Many pages have help icons. Click these icons to open help windows that contain help text, links, or both.	<p>You can use the User Interface Text tool to edit the help text. You can add or remove links by clicking the Manage Help Content link in the help window. But you can't create new help windows to put on the page.</p> <p>In some cases, the same help window appears on more than one page. So whatever you do to the help window on one page applies to the same help window in other places.</p>
Getting Started work area	Select Getting Started from the Navigator to open this work area and review the videos and other information for new users.	You can edit or add to this content by clicking the Edit Getting Started link on these pages.

What Else You Can Do

Here's what you can do with all the help that you or other people added to help windows and the Getting Started work area:

- If you add a lot of links in help windows, you might want to manage your help in a central place. You can use the **Manage Help Content** task in the Setup and Maintenance work area to view and edit all of the help that anyone added.
- If you create help in a test environment, you can migrate all added help by exporting and then importing a configuration package.

Related Topics

- [Add Your Content to a Help Window](#)
- [Manage Help for Fields and Other UI Elements](#)
- [How do I modify text using the User Interface Text tool?](#)
- [Manage Getting Started Content](#)

Scenario 1: Hide All Icons

Hide or Show Help Icons

By default, help icons that open help windows are visible. You can control whether users see the icons every time they sign in, on any page with help icons. You can disable or enable help icons by default, for everyone.

1. In the Setup and Maintenance work area, go to the **Set Help Options** task in the Application Extensions functional area.
2. On the Set Help Options page, deselect or select the **Show help icons by default** check box. You just need to do this for one offering, and the setting applies to everyone.
3. Sign out and sign back in to see your change take effect. The same goes for any user next time they sign in.

To show or hide the icons in a specific user session, people can still click their user image or name in the global header and select **Show Help Icons** or **Hide Help Icons**.

Note: What we are talking about here affects only help windows, not help text that appears when you hover over or click certain UI elements on the page. To edit or delete UI element help text, use Page Composer or other tools.

Related Topics

- [How do I update existing setup data?](#)
- [Manage Help for Fields and Other UI Elements](#)

Scenario 2: Hide Help Links for Partners

Set Up Help

You don't have to set anything up for help to work. But you can do optional setup, for example to give people access to add help content. First enable help features, then perform tasks in the Application Extensions functional area.

Enable Features

In the Offerings work area, review these features at the offering level.

- Local Installation of Help: Make sure to leave this enabled.
- Access to Internet-Based Help Features: This feature isn't used, so it doesn't matter if you enable it or not.
- Help Content Management: Enable this feature if you want some people to be able to add company-specific help to help windows or the Getting Started work area.
- Security for Added Help: Enable this feature if you want certain help to be available only to a restricted set of user roles.

CAUTION: Enable this feature only if you have this requirement, because the feature can affect performance.

Related Topics

- [How You Manage Different Types of Help](#)
- [Hide or Show Help Icons](#)
- [Give People Access to Create and Edit Help](#)
- [Configure Offerings](#)
- [Create Groups to Limit Access to Added Help](#)

Give People Access to Create and Edit Help

If you enabled the Help Content Management feature, check who has the Manage Help Content (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege. Here's what these users can do:

- Add help in any help window, and also edit and manage the help that anyone added.
- Edit existing pages in the Getting Started work area and also add new pages.

Your security administrator can assign custom job roles with this privilege to users. The **Assign Help Text Administration Duty** task is a reminder for you to follow up with your security administrator. Make sure that people who want to create and edit help have the access to do so.

Related Topics

- [How You Manage Different Types of Help](#)

Create Groups to Limit Access to Added Help

In this example, you want to add company policies as help in a help window. But only human resources (HR) specialists should be able to see those policies. You can use a help security group to limit access like this.

Let's look at the steps to create a help security group that includes only a custom job role for HR specialists. You can then secure your company policies with this help security group so that only people with that job role can see the help.

Before You Start

In the Offerings work area, make sure that these features are enabled at the offering level:

- Local Installation of Help
- Help Content Management
- Security for Added Help

Ask your security administrator for the name of the custom job role granted to HR specialists in your company.

Create the Help Security Group

1. In the Setup and Maintenance work area, go to the **Manage Help Security Groups** task in the Application Extensions functional area.
2. On the Manage Help Security Groups page, add a new row.
3. Enter these values, but leave the start and end dates blank.

Field	Value
Help Security Group	HR
Display Name	HR Only
Description	Viewing by HR specialists only

4. Click **Save**.
5. With your new help security group selected, go to the Associated Roles section and add a new row.
6. Select the custom job role for HR specialists as the role name.
7. Click **Save and Close**.

Related Topics

- [Set Up Help](#)
- [Add Your Content to a Help Window](#)
- [Configure Offerings](#)
- [How do I update existing setup data?](#)
- [Create and Edit Added Help](#)

Determine Which Links Appear and in What Order

You can choose to show or hide any of the help you added or any of the predefined help. For the help you added, you can also change the order they appear in the help window.

- While you create help or edit the help that you added, you can set the status so that the link is either shown or hidden in the help window.
- To show or hide predefined help:
 - a. In the Manage Help Content dialog box, select a title in the Predefined Help section.
 - b. Click the **Change Status** button.
 - c. In the Change Status dialog box, select **Active** or **Inactive**.
 - d. Click **Save and Close**.

If multiple help windows link to the same predefined help, the status you set here affects all those windows.

- Click the **Reorder** button on the Manage Help Content dialog box to set the order for links to the help that you added. Your links always show up first in the help window, before any predefined help.

Add Your Content to a Help Window

The easiest way to add help is to start in the help window where you want the help link to appear. You can add links to web pages, upload files, or create help pages in a text editor.

Watch video

1. Go to the page where you want to add help and click the help icon. If you don't see any help icons, click your user image or name in the global header and select **Show Help Icons**. But not all pages have help icons.
2. In the help window, click the **Manage Help Content** link.
3. In the Manage Help Content dialog box, click **Create**.
4. Select a help type:
 - Text: Use a rich text or HTML editor to enter your help content. You can include images, videos, and links.
 - File: Upload a file. Your file opens when users click the link in the help window.
 - URL: Enter the full URL to a website or a file of any type, for example a YouTube video.
5. Select a help security group if you need to restrict access to your help content. Only users with roles in the security group will be able to see the help. The predefined Secured group includes all internal employees and contingent workers.
6. Set the status as Active if you want people to see your help in the help window. Or, you can inactivate your help so that it doesn't appear until you activate it later.
7. Enter the title, which is the text of the link in the help window.
8. If your help type is File, enter a description which users might see after they click the link on the help window, depending on their browser setting.
9. Select another language if your content isn't in American English. In help windows, users see added help in the language they're using for the application.
10. Select a country if your help is targeted at a specific country. Based on what users set in the **Territory** field for their regional preferences, they see generic added help plus added help tagged for their country. There's no impact on predefined help.
11. If your help type is Text, enter your content in the text editor. Or you can click the **Source Code Editing Mode** icon to switch to an HTML editor.
12. Save your work. Be aware that you won't be able to see the new link in the Manage Help Content dialog box or the help window if you set it up for a language, country, or security group that doesn't apply to you.
13. To check your work, click your link in the help window.

Tip: Help that you add using the Text or File type has a unique URL. So, you can link to it from other help or web pages. Updates to the application won't affect the URL or your help content.

12 Additional Learning Resources

Additional Resources

This topic lists additional documentation, training, and other available resources.

Go to the following locations to find more information:

- Documentation, including videos and tutorials, is available at <http://docs.oracle.com>.
- Tutorials are available on the Learning Library at <http://www.oracle.com/oll>.
- More information on client and browser settings located at <http://www.oracle.com/us/products/system-requirements/overview/index.html>.

Community

The **Oracle Applications Customer Connect** (<https://appsconnect.custhelp.com>) offers a place where you can connect with experts from Oracle, our partner community, and other users. Become part of this community to post tips, get answers to your questions, and find valuable information from the people using the application.

Training

Courses are available through Oracle University. You can find a full list of available courses at <http://education.oracle.com/cloud>. The following courses are recommended:

- Implementing Sales
- Composers and Scripting

Documentation

Solutions and documentation are available in the help and in guides. The following guides are recommended:

- Extending Sales and Service
- Using Sales
- Implementing Sales
- Using Customer Data Management
- Implementing Customer Data Management

These guides are available at <http://docs.oracle.com>.

Support Articles

Go to My Oracle Support at <https://support.oracle.com> for the latest implementation articles.

Find Guides, Readiness Material, and Other Resources

The Oracle Help Center has guides, videos, readiness material, playbooks, and other resources for Oracle Fusion Cloud Applications.



Browse for Content

1. From anywhere in the *Oracle Help Center*, open the main menu and click **Cloud Applications > Fusion Applications Suite**. Or, click **Fusion Applications Suite** on the Help Center home page.
2. On the Oracle Fusion Cloud Applications Suite page, click the name of your product.
3. Use the side navigation to find a specific resource, for example:
 - **All Books:** See all the guides for the product.
 - **Cloud Readiness / What's New:** Learn what's new or changed in a particular release update. Readiness material is published before the update happens, to help you prepare for it.
 - **APIs & Schema:** Get reference information about REST APIs, tables and views, and more.

Tip: Use the breadcrumbs to get to other parts of the Help Center.

Search for Content

The filter in the search bar controls the scope of your search. The filter you get depends on where you're at in the Help Center. For example, on a page for a specific product, you get search results only from that product. When you have a guide open, you search within that guide.

Tip: No matter where you're at, you can remove the filter in the search bar to search across the entire Help Center.

After you get your search results, you can apply more filters, for example to see only videos published within the past year. Search results might come from places other than the Help Center, for example *My Oracle Support* or oracle.com.

Review Readiness Material



From anywhere in the Help Center, open the main menu and click **Cloud Applications > Cloud Applications Readiness**. On the Cloud Applications Readiness page, use the side navigation to access readiness material.

Examples of Release Readiness Resources

Entry in Side Navigation	Readiness Resource
Create or View Reports	<p>A report that lists features for the specific pillars, products, modules, and release updates that you select. You get summary information about each feature, and you can also click a feature name or download a spreadsheet to get more details.</p> <p>You can also open and download predefined reports for all products, to see all the features from the past two years, all the Redwood features, or all the features with AI.</p>
<Product Category>	<p>What's New documents that provide details about the features in a specific product and release update. To see which features are delivered disabled or enabled by default, click Feature Summary in the table of contents.</p>
Features with Opt-In Expiration	<p>List of features where the current option to opt in won't be there in the future. See when each feature will no longer be optional.</p>

