

# Oracle Fusion Cloud Sales Automation

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**Using Partner Relationship  
Management for Channel Managers**



Oracle Fusion Cloud Sales Automation  
Using Partner Relationship Management for Channel Managers

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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.

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# 1 About This Guide

## Audience and Scope

This guide contains information to help channel sales managers, channel account managers, and channel operations managers perform day-to-day business tasks using the partner relationship management functionality.

This guide describes how channel managers can manage:

- Partners
- Partner Contacts
- Partner Teams
- Partner Leads
- Deal Registration
- Partner Opportunities
- MDF
- Partner Programs
- Partner Program Enrollments
- Partner Assets
- Partner Relationships
- Partner Service Requests
- Partner Activities
- Partner Business Plans
- Partner Collaboration

## Related Guides

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

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

Title	Description
Getting Started with Your Sales Implementation	Describes how to set up sales automation capabilities by using a case study to describe concepts and procedures.

Title	Description
Using Sales	Describes the tasks that you perform to use your sales applications.
Configuring Applications Using Application Composer	Describes how to use Application Composer to modify and configure your applications.

*Related Topics*

- [Oracle Help Center](#)

# 2 Partner Relationship Management

## Overview of Partner Relationship Management

Channel organizations can use partner relationship management functionality to recruit channel partners and sell products and services through them to grow their business.

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

Channel managers have their own work area to manage Partners, Enrollments, Programs, Marketing Development Funds (MDF), Activities, and Partner Announcements. Partner salespeople can qualify leads, register deals (lead-to-deal registration and deal-to-opportunity conversion), register opportunities, request MDF aid, and view announcements from their channel organization. As well, channel operations managers can make reports available to partners, so the partners can better monitor their performance.

## How Partner Relationship Management Is Organized

Partner relationship management functionality is organized in the following areas:

- Partners
- Enrollments
- Programs
- MDF
- Deal Registrations
- Partner Announcements
- Sales Infolets

## Partners

Channel managers can perform overall partner management, including signing up new partners and providing them with access to the channel organization's applications, managing all aspects of the partner account, including:

- Partner profile information
- Partner contacts
- Partner teams
- Partner leads
- Partner deal registrations
- Partner opportunities
- Partner relationships
- Partner business plans and objectives

- Partner programs
- Partner program enrollments
- MDF
- Partner notes
- Partner activities
- Partner assessments
- Partner collaboration

Channel managers can view a wide range of information about each partner and partners can access the channel organizations applications to manage the following:

- Partners
- MDF
- Lead Qualifications
- Deal Registrations
- Opportunities
- Activities

## Programs

Partner program are strategies used by channel organizations to encourage partners to recommend and sell their products or services. Partner programs define the type of business relationship between channel organizations and their partners. Partner programs provide terms and conditions as well as benefits and incentives.

Channel organizations define partner programs to segment their partners and provide benefits based on partner competencies, performance, and expected revenue from partners. Programs have an eligibility criteria and associated benefits. The partner program describes the requirements and benefits for partners when they're members of the program.

## Enrollments

A partner program 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. Enrollments allow the channel team to track and manage which partner users are taking part in the partner programs offered by the channel organization.

## Marketing Development Funds

Market Development Funds (MDF) are funds that the channel organization makes available to their partners, so the partners can market the channel organization's products in specific geographical areas, or so the partners can market the channel organization's brand in general. MDF enables channel organizations 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.

## Deal Registrations

Deal registration is the process partners use to request exclusive rights to a deal from the channel organization and get an incentive for doing so. 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. The full deal registration life cycle is supported. Partner users (or channel users on behalf of a partner) can convert leads to a deal registrations, and deal registrations to opportunities.

## Partner Announcements

Channel organizations can send announcements that partners can view when they sign in. These announcements communicate important information that the channel sales team want partner users to know.

## Sales Infolets

Channel managers can use their own set of sales infolets so that they're apprised of critical sales and partner activity information, including required action information and detailed reports on one page. The sales infolets include key performance indicators for the following:

- Actual revenue versus quota
- Top opportunities
- Stalled opportunities
- Open pipeline revenue
- Partner status
- Partner performance

## Attachments for Partner Objects

An attachment is a file or URL that is related to an object such as a partner account. Attachments are used to upload, download, and store content or to provide supplementary information for specific business objects.

Users can view, create, update, and delete attachments depending on their job role and security privileges.

## Types of Attachments

The types of attachments are:

- Desktop File: Any type of file created in a third party application (such as MS Word, MS Excel, PDF, and so on).
- URL: A link to a web page on the Internet or intranet.
- Text: Plain text added to an object.

## Partner Business Objects That Support Attachments

The following partner objects support attachments:

- Business Plans
- Business Plan Objectives
- Deal Registrations

- MDF Budgets
- MDF Claims
- MDF Claim Settlements
- MDF Requests
- Partners (Profile)
- Partner Contacts
- Partner Programs
- Program Enrollments

## Create Notes for Channel Sales Objects

Channel managers and partner users can create notes on channel sales business objects to document and convey important information regarding the object. They can save these notes for future reference or to provide details to other users.

They can use notes in several scenarios, such as providing the reason for any changes made to the channel sales business object, and to record decisions and assumptions that led to those changes.

Channel managers and partner users can create notes for the following channel sales business objects:

- Partner Accounts
- Partner Program Enrollments
- Leads
- Deal Registrations
- Opportunities
- MDF Requests
- MDF Claims

## Create a Note

Channel managers and partner users can use these steps to create a note for one of the previously listed channel sales business objects.

1. Sign in with your channel manager or partner credentials.
2. From your home page, navigate to the channel sales business object you want to create a note on.
3. Select the specific record you want to create a note on. For example, select the specific partner account, or the specific lead.
4. Click the **Notes** subtab for the selected channel sales business object.
5. On the Notes page, click **Create Note**.
6. From the **Type** field, select the type of note you're creating. Default values are **General**, **Reference**, and **Special**.
7. Select the **Private** option if the note is for yourself only.
8. Use the note toolbars to format the text for your note.
9. In the note body, type your note.

10. Click **Save and Close** to save your note

## Audit Trail for Partner Objects

Audit trail provides a history of the changes made to data. Partner is one of the business objects that supports audit trail.

Audit trail includes information such as who has accessed an item, what operation was performed on it, when it was performed, and how the value was changed.

Audit information is automatically logged and stored in tables so that it can be queried and displayed with context to a transaction.

The following partner objects support audit trail:

- Partners
- MDF
- Partner Programs
- Partner Program Enrollments
- Deal Registrations
- Business Plans and Objectives

## Overview of the Sales Infolets Page

The Sales Infolets page on the springboard gives channel managers an overview of how partner sales representatives are meeting their quotas, how partners are moving deals through the pipeline, and areas partner sales representatives must focus on for best results.

Each infolet provides key data about a specific area, for example, the revenue from your top open opportunities, what opportunities aren't progressing, and other business transactions. This information keeps channel managers up to date on the sales progress of their partners.

### Infolets on the Sales Infolets Page

The following table shows the infolets that appear on the Sales Infolets page:

Infolet Name	Description
Actual versus Quota (quarterly sales)	The Actual vs Quota infolet provides channel managers with information about the partner's revenue goal for that quarter, the revenue the partner won for that quarter, and what the difference is between the two.
Top Opportunities	The Top Opportunities infolet provides channel managers with revenue information about the top open opportunities (opportunities that have a win percentage greater than 70) for that quarter, and the number of opportunities that have a win percentage greater than 70 for that quarter.

Infolet Name	Description
Stalled Opportunities	The Stalled Opportunities infolet provides channel managers with information about the total revenue from open opportunities that have been in the same stage for longer than the expected time period, and the number of open opportunities that have been in the same stage for longer than the expected time period.
Open Pipeline	The Open Pipeline infolet provides channel managers with information about the total revenue amount of potential sales from all open opportunities for the current and next quarter, and the number of open opportunities in process for the current and next quarter.
Partner Status	The Partner Status infolet provides channel managers with detailed information about the partner, including the number of partners currently awaiting activation (partners in either Prospective or Registered status).
Partner Performance	The Partner Performance infolet provides channel managers with detailed information about the top performing partner, including the partner name and revenue amount.



# 3 Manage Partners

## Overview of Managing Partners

Channel account managers can create and manage partners using the Partner UI pages. Channel account managers can:

- Create new partner users.
- Review partner profile information, such as name, address, and contact information.
- Build and view lists of their partners.
- See overview information for opportunities, leads, enrollments and activities.
- Edit partner detail information.
- Mark partner and partner contact records as their favorites.

## Create a Partner Saved Search

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

### Create a Saved Search for the Current User

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

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

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

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

1. Sign in with your channel manager or partner credentials.
2. Ensure that you're in a sandbox.
3. From the Settings and Actions menu, click **Edit Pages**.

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

## Saved Search in Workspace

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

### Related Topics

## Review Partner Overview Information

The following table shows the partner's key information and transaction summary details that channel account managers can view.

Partner Object	Information Channel Managers Can View
Key Partner Profile Details	<ul style="list-style-type: none"> <li>Type</li> <li>Status</li> <li>URL</li> <li>Address</li> <li>Primary Contact</li> <li>Owner</li> <li>Contacts</li> </ul>
Deals	<ul style="list-style-type: none"> <li>Open Leads</li> <li>Pending Deal Registrations</li> <li>Open Opportunities</li> </ul>
Enrollments	<ul style="list-style-type: none"> <li>Active Enrollments</li> </ul>

Partner Object	Information Channel Managers Can View
	<ul style="list-style-type: none"><li>Enrollments Pending Approval</li></ul>
Open Activities	All
Open Service Requests	All

## View the Partner Overview Page

Channel account managers can use these steps to access a partner's overview page:

1. Sign in with your channel account manager credentials.
2. Click Partners.
3. From your list of partners, search for and select the partner you're interested in reviewing.
4. Review the partner information on the overview page.
5. You can click the links on the individual infolets to expand their details.
6. You can navigate back to your list of partners to select another partner to review.

## Create New Partner Accounts

Channel managers can use the Partners UI to create new partner accounts, including the partner user (resource) for the partner account and the primary contact for the partner account.

If the new partner already exists as a customer account, then channel managers can convert the same account to a partner, thereby creating a dual usage partner (where the same party exists as both an account and a partner). Channel managers can also activate the partner account from the Partners UI during the partner account creation process.

## Create Partner Account

Channel account managers can use these steps to create a new partner account, partner resource, primary contact, and activate the partner account.

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 fields available on the Create Partner page, and indicates what to type or select in each field.

Field Name	What to Type or Select
Name	Type a unique name for the partner account you're creating.
Type	Select the type of partner account you're creating. Default values are:

Field Name	What to Type or Select
	<ul style="list-style-type: none"> <li>○ Business process owner</li> <li>○ Certification and compliance provider</li> <li>○ Education services provider</li> <li>○ Independent software supplier</li> <li>○ Original equipment manufacturer</li> <li>○ Re-seller</li> <li>○ Support services provider</li> <li>○ Systems integrator</li> <li>○ Value added distributor</li> </ul>
Level	If you have enabled levels, select the level for the partner account. Default values are Gold, Platinum, Premier, Silver, and Strategic.
Status	<p>If you want to make the new partner account active, select Active. Otherwise, select Prospective or Registered.</p> <p>The partner account must have a primary contact before you can save the partner as Active, unless your setup doesn't require it.</p>
Country	Select the country where the partner account is located.
Address Line 1	Type the street address of the partner account.
City	Type the city where the partner account is located.
State	Type the state where the partner account is located.
Postal Code	Type the postal code for the partner account.

- You can create the primary contact for this partner account at the same time you create the account. To create the primary contact, click the **Create Primary Contact** check box.

If the Partner Contact Required for Active Partners profile option (ZPM\_PARTNER\_CONTACT\_MANDATORY) is **Yes**, then a partner account must have a primary contact assigned before you can activate the partner account. In this case, the application automatically assigns the Partner Administrator role to the primary contact, which you can later change if necessary.

If the Partner Contact Required for Active Partners profile option (ZPM\_PARTNER\_CONTACT\_MANDATORY) is **No**, then you can create and activate the partner, and then later create the primary contact and assign a role.

6. Provide the following information for the primary contact:

The following table shows the fields available on the Create Primary Contact page, and indicates what to type or select in each field.

Field Name	What to Type
First Name	Type the first name of the primary contact.
Last Name	Type the last name of the primary contact.
Job Title	Type the job title of the primary contact.
Email	Type the email address for the primary contact.

7. Click **Save and Continue**.

8. If an account already exists with the same name as the partner that you're creating, then that account will be listed on the Possible Duplicates page.

To convert the existing account to the new partner, click the **Select** button next to the account. This creates a partner that has a dual usage where the same party exists as both your customer account as well as your partner. You can add existing account contacts as partner contacts. This saves you time and keeps your data clean.

If no possible duplicates exist, then you can go ahead and create the partner.

**Note:** To enable partner deduplication, your administrator should set the Duplicate Account Notification profile option (ZCM\_ACC\_DUP\_NOTIFICATION) to **True**.

Once you create an account, you can mark partners as favorites using the **Add to Favorites** icon.

## Inactivate Partner Account

You can't delete partner accounts, but you can inactivate them by changing the status to either **Expired** or **Terminated**.

When a partner account's status is **Terminated**:

- You can't modify existing user accounts of that partner or create new user accounts for that partner.
- You can still create new partner contacts.
- You must deactivate any existing user accounts that you don't want logging in, before you terminate a partner, because existing partner contacts and their user accounts are intact even after you terminate a partner.
- You can always change the status of the partner back to active to allow creation or modification of the user account again.

## Edit Partner Information

Channel account managers edit partner information by filtering their list of partners to find and select the partner, then clicking the Edit action.

Use the following steps to edit partner information:

1. Sign in with your channel account manager credentials, and click **Partners**.
2. From your list of partners, search for and select the partner with information you want to edit.
3. Click the partner's **Profile** tab.
4. Update the information for the partner.
5. (Optional) To mark this partner record as your favorite, click the **Add to Favorites** icon.
6. Click **Save and Close**.

## Manage Partner Announcements

Announcements are an effective means of providing your partners with important information.

If you have sales administrator or channel operations manager credentials, you can use the Partner Announcements page to manage the announcements you want your partners to see on their home page when they sign into the channel organizations applications.

You can use the Show tool on the Partner Announcements page to view active, expired, and future partner announcements.

### Create a New Partner Announcement

Channel operations managers and sales administrators can use these steps to create a new announcement for a partner or partners.

1. Sign in with your channel operations manager or sales administrator credentials.
2. From the Partner Management page, click **Partner Announcements**.
3. On the Partner Announcements page, you see a list of all active partner announcements.

**Note:** You can see expired or future announcements by setting the Show filter to Expired or Future respectively.

4. Click **Create Announcement** to create the partner announcement.
5. On the Create Announcement page, provide the following required information:
  - Subject: what the announcement is about in a couple words
  - Start Date: you can send future announcements by selecting the appropriate date.
  - End Date: you can set a date for the announcement to end.
  - Content: you can add plain text, html, an embedded icon, image, video, or hyperlink.
6. You can click **Save and Close** to save the announcement and it will be sent to all partners when activated.

7. If you want to send the announcement to one or more specific partners, select one of the following Audience options:
  - Select Partners by Attributes: you specify partners based on partner country, partner type, or partner level.
  - Select Specific Partners: click Add Partner and select at least one partner from your list of partners.
8. Click **Save and Close** to send the announcement out to the specified partner or partners.  
When the date indicated as the start date for the partner announcement occurs, the announcement appears to partners on their home page and remains there until the specified end date or until you specify and end date.

## Deactivate a Partner Announcement

Channel operations managers and sales administrators can use these steps to deactivate an announcement so their partner or partners can no longer see it.

1. Sign in with your channel operations manager or sales administrator credentials.
2. From the Partner Management page, click **Partner Announcements**.
3. On the Partner Announcements page, you see a list of all active partner announcements.
4. Select the announcement you want to deactivate.
5. On the Edit Announcements page, provide an end date for the announcement.
6. Click **Save and Close** to deactivate the announcement on the specified end date.

## Changes to Personal Information

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

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

## What Prospective Partners Can Do

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

## FAQs About Partners

### What's a partner profile?

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

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

## How is partner profile information gathered?

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

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

## What partners does selecting My Partners display?

When you select the My Partners list in the Partners work area, the application displays a list of all of the partners where you're listed as the partner owner.

You're automatically the partner owner if you created the partner or an application administrator can designate you as the owner.

## What partner records do the different record sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of partners.

The following table lists and describes the record sets for partners.

**Tip:** To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records where you're on the team. Or, restrict your searches to a smaller geographical area. For example, search all the partners in one state instead of the whole country.

Record Set Name	Description
I own	Partners you own. You're the partner owner if you created the partner or if ownership was assigned to you.
I am on the team	Partners where you're on the partner team. You're on the partner team if you're the partner owner or were added as a member by another team member.
All records I can see	Partners that you can view depending on your partner team membership, sales territory assignments, your position in the organization, and security permissions.



## Why can't I see some partner profile attribute values when I create a partner?

The synchronization job updates the data from Lookups to BI and then from BI into the territory dimension tables, so you must run the territory dimension synchronization process to include new lookup values.

The partner profile attributes listed in the following table require you to run the territory dimension synchronization process before you can see their existing or changed values in the UI.

The following table shows the partner profile attributes that read from territory dimensions and require synchronization, including Partner Geographies, Partner Industries, and Partner Focus Areas. This table also shows the task name and profile option used to manage the attributes of each, including the Manage Territory Geographies task for Partner Geographies Served, the Manage Profile Options task and the MOT\_INDUSTY\_CLASS\_CATEGORY profile option for Partner Industries, and the Define Sales Catalog - Manage Product Groups task for Partner Focus Areas.

Attribute Name	Task Name	Profile Option or Lookup Name
Partner Geographies Served	Manage Territory Geographies - the geography structure used by Territory Manager.	N/A
Partner Industries Served	Manage Profile Options	MOT_INDUSTY_CLASS_CATEGORY - contains the classification category used for Industries Served dimension.
Partner Focus Areas	Define Sales Catalog - Manage Product Groups	N/A



# 4 Manage Partner Contacts

## Overview of Managing Partner Contacts

A partner contact is a person within the partner company. A partner contact can be a member of only one partner organization. Channel account managers can create and manage partner contacts.

Partners and channel managers can both mark their favorite partner contacts using the **Add to favorites** icon on the Partner Contacts page.

### Types of Partner Contacts

There are three different types or levels of partner contacts, with each type providing greater access to sales functionality. The following table shows each type or level for partner contacts, including partner contact, partner resource, and partner user.

Type of Partner Contact	Description
Partner Contact	<p>A partner contact is a person working for the partner organization. Channel managers can use partner contacts in the same way salespeople use account contacts in a direct sales environment. For example, channel managers must know who's who within a partner organization and how to reach them.</p> <p>The difference between account contacts and partner contacts is that account contacts are the people your sales organization sells to and partner contacts are the people your sales organization sells with.</p>
Partner Resource	<p>When partners participate in the sales process, channel managers can assign a role to the partner contacts of the partner organization and transform these partner contacts into partner resources. Partner resources can be assigned to sales object teams, such as accounts or opportunities, so that channel managers can better track what the resources within a partner organization are working on. Channel managers can also select a manager for the partner resource.</p>
Partner User	<p>If a partner organization agrees to use the channel organization's Oracle sales application to manage their sales objects, such as accounts and opportunities, then channel managers can create a user account for the partner resources of that partner organization. When channel managers create a user account for a partner resource, the partner resource becomes a partner user.</p> <p>Partner users have more privileges, such as being able to sign into the channel organization's sales application and work their opportunities or manage their accounts either alone or with the channel organization's sales organization.</p>

### Assign Roles to Contacts

Channel account managers can enable a partner contact as resource by assigning a role to the contact, and optionally provisioning a user account for the contact. To assign a role to a contact, click the Manager User Details link on the Edit Partner Contact page.

If the primary contact was created when the partner account was created, then the primary contact was automatically assigned the Partner Administrator role. You can change this role, if required.

If a partner account was created without a primary contact, then you can always add the primary contact later and assign a role at that time. A partner account can be created without a primary contact only if the Partner Contact Required for Active Partners profile option (ZPM\_PARTNER\_CONTACT\_MANDATORY) is set to **No**.

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

## Add Existing Account Contacts as Partner Contacts

Channel account managers can add existing account contacts to a partner as partner contacts, so they don't create multiple records for the same contact person. To add account contacts as partner contacts, the partner must also be an account.

When channel account managers delete partner contacts with user accounts, those user accounts are deactivated so the partner contacts can no longer sign into the partner portal.

## Create New Partner Contacts

Channel account managers can use the Partner pages to create new partner contacts for their partner organizations.

Use these steps to create a new partner contact for a partner.

1. Sign in with your channel account manager credentials.
2. Click **Partners**, and from your list of partners, search for and select the partner to edit it.
3. Click the partner's **Partner Contacts** tab.
4. Click **Create Contact** and enter the details.
5. Click **Save and Close**.
6. Select the partner contact and click **Manage User Details** to manage additional user information, such as provisioning:
  - Resource
  - Role
  - User account
7. User account provisioning gives the partner contact access to the channel organization's Oracle Cloud applications.

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

## Add Existing Account Contacts as Partner Contacts

Channel account managers can add existing account contacts as partner contacts. To do this, the partner must be a dual usage partner, where the same party exists as both a customer account as well as a partner.

## Add Accounts Contacts as Partner Contacts

Review the topic, [Create New Partner Accounts](#), to learn how to create a dual usage partner. Once you have a dual usage partner, you can add an existing account contact as a partner contact:

1. Sign in with your channel account manager credentials.
2. Click **Partners**, and from your list of partners, search for and select the partner.
3. Click the partner's **Partner Contacts** tab.
4. Click **Add Contacts**.

**Note:** The Add Contacts button displays only if the partner is also an account that you sell to (a dual usage partner).

5. On the Add Contacts page, search for and select the contact you want to add as a partner contact.
6. Click **OK**, and click **Save and Close**.

### Related Topics

- [Create New Partner Accounts](#)

## Edit Partner Contacts

Channel account managers can use the Partner pages to edit partner contact information. Channel account managers can edit the partner contact's name, e-mail address, job title, phone number, and address.

Use these steps to edit information about a partner contact.

1. Sign in with your channel account manager credentials.
2. Click Partners and from your list of partners, select the partner.
3. Navigate to the partner's list of Partner Contacts and select the partner contact you want to edit.
4. On the Edit Partner Contact page, you can edit the partner contact's name, e-mail address, job title, phone number, and address.
5. Click Save and Close.

## Edit Partner Contact User Information

Channel account managers can use the Partner pages to edit user information about a partner contact, including the partner contact's role and manager. Channel account managers can also grant the partner contact access to the channel organization's Oracle Cloud applications.

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

Use these steps to edit user information about a partner contact.

1. Sign in with your channel manager credentials.

2. Click **Partners** and from your list of partners, select the partner.
3. Click the **Partner Contacts** tab, and search for and select the partner contact you want to edit.
4. Click the contact's **Profile** tab.
5. Click the **Manage User Details** link.
6. On the Manage User Details page, you can edit the partner contact's role and manager.
  - o If you want to create a user account for the partner contact, click the **Create User Account** check box.
  - o If the partner contact is already a user and you want to deactivate the user account, click the **Deactivate User Account** link.
7. Click **OK**, and click **Save and Close**.

## Edit the Partner Contact Hierarchy

Channel managers with edit access to partner accounts and partner contacts can edit their partner's contact hierarchy, including making management changes and changing the current root or top resource in their partner's contact hierarchy.

Partner administrators with the ability to perform delegated user administration, such as accessing the Partners information in the channel organization's Oracle Cloud applications, can also make these changes for their company's contact hierarchy.

You don't need to deactivate the old head of hierarchy user before appointing a new hierarchy head. The user account for the old head of hierarchy remains active and automatically reports up to the new hierarchy head. If the previous head of hierarchy is the primary contact for the partner company, he or she remains the primary contact. Also, all teams below the previous hierarchy head remain intact and continue to report to the previous hierarchy head.

Only partner contacts who have a managerial resource role can be promoted to the head of the partner contact hierarchy. Channel managers and partner administrators can use these steps to edit their partner contact hierarchy.

1. Sign in with your channel manager or partner administrator credentials.
2. Navigate to the Partner Contact UI.

Channel Managers:

- a. From the home page, click **Partner Management**.
- b. Click **Partners**.
- c. From your list of partners, select the partner account the contact belongs to.
- d. Click the **Partner Contacts** subtab.

Partner Administrators:

- a. From the home page, click **Partner Management**.
- b. Click **Partners**.
- c. On the Partner Profile page, click **Edit**.
- d. Click the **Partner Contacts** subtab.
3. Click the name of the contact whose hierarchy information you want to update.
4. On the Edit Contact page, click the **Manage User Details** link.
5. On the Manage User Details page, you can update the following:

The following table shows the fields, options, and buttons on the Manage User Details page, including Role, Manager, Head of Hierarchy, Create User Account, Sign In as User, and Deactivate User Account.

Field, Option, or Button	Description
Role	Select a role for this contact in the partner company. Default values are Partner Administrator, Partner Sales Manager, and Partner Salesperson.
Manager	Select a manager in the partner company for this contact.
Head of Hierarchy	<p>Select this check box if you want this contact to be the root or top resource in the partner company's contact hierarchy. The Head of Hierarchy check box is only active if you have selected Partner Administrator or Partner Sales Manager, or a customer-defined resource role that's set up as a Manager role, for the contact.</p> <p><b>Note:</b> You can't delete a partner account's primary contact if the contact is the root of the partner resource organization.</p>
Create User Account	Select this check box to create a user account for this contact.
Sign In as User	Click this button to sign in as this contact.
Deactivate User Account	Click this button to deactivate this contact as a user. For example, if the user leaves the partner company.

- Click **OK**, then click **Save and Close** to save your changes.





# 5 Manage Partner Teams

## Create Teams for Partners

Organizing your partner resources into teams helps streamline many processes, such as assignment, approval, and notification workflows.

### Create Teams

Sales administrators and channel managers can use these steps to create teams for a partner account.

1. Sign in with your sales administrator or channel manager credentials.
2. On your home page, click **Partner Management** and click **Partners**.
3. From your list of partners, click the name of the partner account you want to create a team for.
4. On the Edit Partner page, click the subtab for the business object you want to create a team for. The following table lists the business objects you can create teams for and how to navigate to the page where you can add team members.

Business Object	Navigation
Partners	Click the <b>Team</b> subtab.
Leads	Click the <b>Leads</b> subtab, select the lead, and click the <b>Team</b> subtab on the View Lead page.
Deal Registrations	Click the <b>Deal Registrations</b> subtab, select the deal registration, and click the <b>Team</b> subtab on the Edit Deal Registration page.
Opportunities	Click the <b>Opportunities</b> subtab, select the opportunity, and click the <b>Team</b> subtab on the Edit Opportunity page.
Service Requests	Click the <b>Service Requests</b> subtab, select the reference number of the service request, and click the <b>Team</b> subtab on the Edit Service Request page.
Business Plans	Click the <b>Business Plans</b> subtab, select the business plan, and click the <b>Team</b> subtab on the Edit Business Plan page.

5. Click **Add Team Member**.
6. Search for and select the resource you want to add to the team.
7. Click **OK** to add the resource to the team.

8. On the Edit page, you can provide more information about the resource, such as:
  - o Access: Select the level of access you want the resource to have for the business object. Default values are View, Edit, and Full.
  - o Function: Select the role that the resource has in the company, such as channel account manager.
9. Click **Save and Close** to save your changes.

## Create MDF Teams

Sales administrators and channel managers can use these steps to create teams for MDF budgets, MDF requests and MDF claims.

1. Sign in with your sales administrator or channel manager credentials.
2. On your home page, click **Partner Management** and click **MDF**.
3. Depending on which MDF business object you want to create a team for, click the **Requests**, **Claims**, or **Budgets** subtab.
4. On the List page, select the MDF request, MDF claim, or MDF budget you want to create a team for.
5. On the Edit page, click the **Team** subtab.
6. Click **Add Team Member**.
7. Search for and select the resource you want to add to the team.
8. Click **OK** to add the resource to the team.
9. On the Edit page, you can provide more information about the resource, such as:
  - o Access - Select the level of access you want the resource to have for the business object. Default values are View, Edit, and Full.
  - o Function - Select the role that the resource has in the company, such as channel account manager.
10. Click **Save and Close** to save your changes.

## Assign Territories to Partners with Batch Assignment

This topic explains how to assign territories to partners using batch assignment.

### Configure Batch Assignment

The following table shows the view criteria names and some example bind variable values to use when configuring batch assignment.

View Criteria Name	Bind Variable Value
PartnersOfAStatus	BindStatus=ACTIVE
PartnersCreatedInLastNDays	BindNumberOfDays=1
PartnersUpdatedInLastNDays	BindNumberOfDays=2
PartnersImportedInABatch	BindImportBatchId=11001

View Criteria Name	Bind Variable Value
PartnersInACountry	BindCountryCode=  For example, the BindCountryCode for the United States is US.
PartnersBelongingToAnIndustry	BindIndustryBelongedTo=1000  Where 1000 is Industry Classification code.
PartnersWithAProductDim	BindProduct=Education
PartnersWithAGEographyDim	BindGeographyServed=Netherlands
PartnersWithIndustryDim	BindIndustryServed=Life Sciences

1. From the Tools area in Navigator, select **Scheduled Processes**.
2. On the Scheduled Processes page, click **Schedule New Process**.
3. On the Schedule New Process dialog box, click the drop-down arrow next to **Name** and then click the **Search** link.
4. On the Search and Select: Name dialog, type **Assign** in the **Name** field and click **Search**.
5. Select **Assign Territories to Partner Account** from the returned list and click **OK**.
6. Click **OK** on the Schedule New Process dialog.
7. On the Process Details page, enter View Criteria Name and View Criteria Bind Values, then click **Submit**.
8. The Scheduled Processes page appears. Notice that the Status is Scheduled. You can click the **Log** link to see the log.

## View a Partner's Channel Territories

To better understand the focus areas of a partner, channel managers must be able to see the channel territories that are assigned to a partner account.

Partner Administrators can view the territories assigned to their account instantly so they can better focus their effort on deals pertaining to those territories.

Channel managers and partner administrators can use these steps to view the channel sales manager territories that are assigned to a partner account.

1. Sign in with your channel manager or partner administrator credentials.
2. Click **Partner Management**, and click **Partners**.
3. From your list of partners, select the partner you want to view channel territories for.
4. On the Edit Partner page, click the **Team** subtab.
5. In the Show field on the Team page, select **Territories**.  
The Team page updates to display a list of all channel sales manager territories assigned to the partner.
6. To ensure you're viewing the most recent list of assigned channel sales manager territories, you can select the **Assign Territories** action from the Actions menu.

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This action runs automatic territory assignment. After the territory assignment process finishes, you see a confirmation message and the list of territories updates to display the most current list of channel territories that are assigned to the partner.

# 6 Manage Partner Leads

## Overview of Managing Partner Leads

Channel account managers can use the Leads UI pages to assign leads to the partners who are best qualified for the leads, and track the progress of the lead.

They can also convert the lead into a deal registration (if the channel organization offers deal registration) or an opportunity. The leads available to channel account managers may come from territory-based assignment, rule-based assignment, or a combination of both.

When a channel account manager assigns leads, the primary partner contact for each partner receives notification of the lead assignment, so that the partner contact can accept or reject the leads.

Channel account managers can assign partners to a lead by:

- Changing the lead owner to a specific partner user or contact in the Edit Lead page.
- Changing the partner to a specific partner account. In this instance, the partner's primary contact is automatically assigned to the lead (added to the team).
- Using the Assign Partner action in the Leads list (landing) page to select and assign a partner account to the lead. In this instance, the selected partner is set as the primary partner and the partner's primary contact is added to the team.

From the Leads list (landing) page, channel account managers can perform the following actions on individual or multiple leads at the same time:

- Assign partners to leads
- Reassign leads
- Accept or reject leads
- Score and qualify leads
- Retire or reopen leads
- Convert leads to opportunities

Partner users and channel account managers can also mark their favorite leads using the **Add to Favorites** icon on the Edit Lead page.

## Assign Leads to Partners

Channel account managers can use the Leads pages to assign and reassign leads to the partners who are best suited to successfully handle the lead and drive it forward toward becoming an opportunity.

## Assign Leads

If you're a channel account manager, you can follow these steps to assign leads to your partners:

1. Sign in with your Channel Account Manager credentials and click **Leads**.
2. On the Leads list page, select the lead you want to assign. If you created a saved search for unassigned leads, such as **Unassigned Partner Leads**, you can use that to filter your list.
3. Click the **Assign Partner** action to search for and select the appropriate partner for the lead.
4. Click **OK**, and click **Yes** to confirm.

## Reassign Leads

If you're a channel account manager, you can follow these steps to change lead assignment from one partner to another:

**Note:** When you reassign a lead to another partner, the previous partner's team members are removed from the lead team, and the primary contact of the newly assigned partner is added to the lead team.

1. Sign in with your Channel Account Manager credentials and click **Leads**.
2. On the Leads list page, search for and select the lead you want to reassign.
3. From the Actions list, select **Assign Partner**.
4. On the Select Partner page, search for and select the partner you want to have to lead.
5. Click **OK**, and click **Yes** to confirm the partner change.

## Review Leads Created by Partners

After a partner user runs assignment, channel managers who are assigned to the Channel Sales Manager territory can view the leads that the partner user created. Channel managers can also create rules to assign the leads to one or several channel users.

They can review a partner created lead by opening the lead, reviewing the lead information, and choosing an action to take from the Actions menu.

Use these steps to review a lead created by one of your partner users.

1. Sign in with your channel account manager credentials.
2. Click **Leads**.
3. From your list of leads, search for and select the partner lead you want to review.
4. On the Edit Leads page, you can review the detailed information about the lead.
5. If you changed any of the information, click **Save and Close**. Otherwise, click **Close**.
6. Channel account managers can perform the following on the Edit Lead page:
  - Qualify or unqualify the lead.
  - Reject the lead.
  - Change lead ownership.
  - Provide visibility to partner users from other partner organizations by adding those partner users to the lead team.

- Assign the lead to a different partner.
- Mark the lead as a favorite.

## Convert Partner Leads to Opportunities

Channel account managers can convert partner leads to opportunities for their partner users by selecting the lead, and clicking Convert from the Actions menu.

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

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

**Tip:** Partner users can also convert leads to opportunities, but an administrator must specifically set this up.

## Reject Partner Leads

Channel managers can use the Leads pages to reject leads. If a channel manager rejects a lead then the channel manager becomes the owner of the lead, but the partner user can still view the lead. Qualified leads become unqualified when they're rejected.

Partner users can also reject a lead assigned to them if they aren't interested in the lead or if they already have that lead.

If you're a channel manager, you can follow these steps to reject leads assigned to your channel:

1. Click **Leads**.
2. From the Leads list page, search for and select the partner lead you want to reject.
3. Select the lead and from the Actions list, select **Reject**.
4. Click **OK**, and click **Yes** to confirm your action.





# 7 Manage Deal Registrations

## Overview of Deal Registrations

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

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

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

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

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

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

This topic covers the following:

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

## Deal Registration Process

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

## Deal Registration Benefits

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

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

## Deal Registration Roles and Associated Actions

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

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

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

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

## Partner Deal Registration Management

Channel account managers can use the Deal Registration UI pages to manage deal registrations for their partners.

This topic discusses the following:

- Channel Account Manager List Views
- Approving, Rejecting or Returning a Partner Deal Registration
- Resolving Duplicate Partner Deal Registrations
- Partner Deal Registration Approval Information and Approval History Region
- Creating a Partner Deal Registration
- Editing a Partner Deal Registration
- Partner Deal Registration Expiration

### Channel Account Manager List Views

Channel account managers use a springboard page for direct access to deal registrations submitted by their partners and to view lists of deal registrations relevant to their role. These lists only display columns pertaining to the tasks channel account managers perform, so they can quickly view and respond to deal registrations awaiting their approval without needing to manually enter a search each time.

Both channel account managers and partner users can access the Deal Registrations page by clicking the Deal Registrations icon on their desktop. Both channel account managers and partner users see the same preconfigured sort for all Deal Registration lists - Submitted Date descending (oldest to newest submissions). Both see the same preconfigured Deal Registrations table column layout. Both see the same preconfigured saved search run on the Deal Registrations page. However, channel account managers can view and edit a deal registration's details by clicking the deal registration number on their list view, and they can also perform searches using default search attributes, including:

- Partner
- Partner Contact

- Record Set
- Deal Registration Name
- Registration Status
- Submitted Date
- Last Updated Date
- Account Name
- Contact Name
- Opportunity Name
- Deal Expiration Date
- Deal Registration Number

## Approve, Reject, Return, or Withdraw a Partner Deal Registration

If the deal registration approval workflow has been configured for the channel account managers to be the approvers, then channel account managers can approve, reject, return, or withdraw (if the channel manager is the submitter) a deal registration. The following table explains what happens when a channel account manager takes each of these actions.

Action Taken	What Happens
Approve	<p>If the channel account manager is the last or only approver for the deal registration, the status changes to Approved. The status remains Pending Approval if the channel account manager isn't the last approved for the deal registration.</p> <p>If the deal registration isn't already associated with an existing opportunity, the deal is converted to a new opportunity upon final approval. Conversion to an opportunity doesn't take place if the deal registration is associated with an opportunity, either through the Opportunity field of the deal registration, through resolving duplicate opportunities, or through the Deal Registrations tab for an opportunity.</p> <p>If the deal registration was approved by mistake, the channel operations manager or other users with administrator rights can revert the status of the deal registration to Pending Approval by resubmitting the deal registration.</p>
Reject	<p>From their list view, channel account managers can select one or more rows in any list that contains deal registrations pending approval and reject all of the selected deals. If a deal registration is in Pending status, channel account managers can also reject it by selecting the Reject action from the deal registration's Edit page.</p> <p>Channel account managers can provide a rejection reason and comments about why the deal registration was rejected.</p> <p>The rejected deal registration no longer appears in lists of deal registrations in any status other than Rejected.</p> <p>If the deal registration was rejected by mistake, the channel operations manager or other users with administrator rights can revert the status of the deal registration to Pending Approval by resubmitting the deal registration.</p>
Return	<p>From their list view, channel account managers can select one or more rows in any list that contains deal registrations pending approval and return all of the selected deals. If a deal registration is in Pending status, channel account managers can also return it by selecting the Return action from the deal registration's Edit page.</p>

Action Taken	What Happens
	<p>Channel account managers can provide a return reason and comments about why the deal registration was returned.</p> <p>The returned deal registration no longer appears in lists of deal registrations in any status other than Returned.</p>
Withdraw	A channel manager can withdraw a deal registration if the channel manager submitted the deal registration on behalf of a partner. After the deal registration is withdrawn, the channel manager can resubmit it for approval.

## Resolve Duplicate Partner Deal Registrations

Before approving a deal registration in Pending Approval status, channel account managers can first check for potential duplicate accounts, contacts, and opportunities on the Edit Deal Registration page. By reducing duplicates, channel account managers can maintain clean customer data, prevent channel conflict, and accurately reward the first partner to register the deal.

If duplicates are detected, the channel account manager sees a list of possible duplicate record types, followed by a table showing which one is currently used on the deal registration. The channel manager reviews the possible duplicates and can either select an existing account or contact, or continue to use the current account or contact on the deal registration. The channel manager can also associate the deal registration with an existing opportunity, or choose to create a new opportunity upon approval of the deal registration.

To check for duplicates:

1. Sign in as a channel manager.
2. Click **Deal Registrations**.
3. On the Deal Registrations list page, open a deal registration that's pending approval.
4. Click **Actions**, then **Check for Duplicates**.
5. On the Resolve Duplicates page, view the list of possible duplicate accounts. Select an existing account or continue to use the current account on the deal registration.  
Expand the suggested account to see which attributes from the suggested account match the current account. Attributes that are compared include account name, organization type, organization size, and address.
6. Next, the Resolve Duplicates page displays a list of possible duplicate contacts. Select an existing contact or continue to use the current contact on the deal registration.  
Expand the suggested contact to see which attributes from the suggested contact match the current contact. Attributes that are compared include the contact's first and last name, job title, email address, and telephone number (including country code and area code).
7. Finally, the Resolve Duplicates page displays a list of existing opportunities, one of which you might want to associate with this deal registration. Associate this deal registration with an existing opportunity or create a new opportunity once you approve this deal registration.  
To find potential existing opportunities, these opportunity attributes are searched for: account, status, primary contact, primary partner, and close date range.

**Note:** The opportunity attributes used to find potential duplicates can't be changed. Account and contact attributes, however, are specified in Oracle Enterprise Data Quality (EDQ) rules, which you can modify if needed. To learn more about EDQ, see "Overview of Duplicate Identification" in the Related Topics.

## View Deal Registration Approval Information and Approval History

On the Approvals subtab of the Edit Deal Registration page, channel account managers can view the approval information and the approval history for a submitted deal registration, so they can see who approved or rejected the deal registration and at what stage in the approval workflow.

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

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

Once a deal registration has been submitted, channel account managers can see the deal registration's approval history, including:

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

## Create a Partner Deal Registration

Channel account managers can create a new deal registration for one of their partners in situations where the partner doesn't have access to the channel organization's applications to register a deal. Channel account managers ensure that the partner receives the deal registration benefits and channel account managers also provide visibility to the partner's pipeline.

When creating a deal registration for a partner, the channel account manager can:

- View and update header information
- View and update customer information, such as: account, contact, and address information
- Select a partner for the deal registration
- Specify the partner type
- View and update product information
- Save and close the deal registration
- Save and continue editing the deal registration
- Cancel the deal registration

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

When you copy a deal registration:

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

The following objects aren't copied:

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

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

To use the Copy action:

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

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

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

## Edit a Partner Deal Registration

Channel account managers can review and edit deal registrations they created on behalf of a partner or deal registrations submitted for approval by their partners. Channel account managers must validate that the deal registration meets their company's criteria for approval before converting it to an opportunity.

Channel account managers can edit a deal registration's details from their list view by clicking the deal registration number. On the deal registration's Edit page, channel account managers can take the following actions:

- Approve the deal registration
- Reject the deal registration
- Return the deal registration
- Save and close the deal registration
- Cancel updates and close the deal registration

Channel account managers can edit information on the following deal registration tabs:

- **Summary:** view and update customer information, such as account, contact, and address information
- **Team:** manage the deal registration visibility for internal resources or partner resources
- **Activity:** view and manage activities
- **Notes:** edit notes

## Partner Deal Registration Expiration

To gain better visibility of deals that partners aren't able to close, channel account managers can configure the deal registration status to change to Expired when a deal has exceeded the expiration period of 90 days from approval date.

Once a deal registration has been approved, channel account managers can see and change the expiration period for a deal registration in the Expiration Date field. The preconfigured value is 90 days after the approval date. The partner receives a notification that the deal registration expires soon. The preconfigured value is 30 days.

When the expiration date passes and the opportunity associated with the deal registration hasn't closed, the deal registration status changes to Expired and the associated opportunity's Registered status changes from Yes to No. The partner receives a notification that the deal has expired. The partner can't reopen or resubmit the expired deal registration and must create a new one.

### Related Topics

- [How do I identify duplicates?](#)

## Create a Pending My Approval Saved Search for Deal Registrations

Channel managers can create a Pending My Approval saved search for deal registrations. This saved search shows all deal registrations that are pending approval by the signed in channel manager.

This saved search differs from the All Pending Deal Registrations saved search because it doesn't show deal registrations the signed in channel manager has access to that are pending approval by other users.

Channel managers can use these steps to create a Pending My Approvals saved search for deal registrations and set it as the default search for the specific channel manager role.

1. Sign in with your channel manager credentials.
2. Ensure that you're in a sandbox.
3. From the Settings and Actions menu, click **Edit Pages**.
4. Select the option to edit pages at the **Job Role** level, select **Channel Sales Manager** or **Channel Account Manager**, and click **OK**.
5. Navigate to the Deal Registrations page.
6. On the Deal Registrations page, click **Show Advanced Search**.
7. Provide the following search criteria:
  - Record Set Equals **Records pending my approval**
  - Status Equals **Pending Approval**



- (Required) Last Updated Date **Between** [90 days or less from today] - [today]
- 8. Click **Save**.
- 9. In the Create Saved Search dialog box, type a name for the saved search, such as Pending My Approval.
- 10. Select the **Set as Default** check box if you want to make this search the one that loads when a user with the channel manager role you specified displays the page.
- 11. Select the **Run Automatically** check box if you want to run the search automatically when this search is loaded.
- 12. Click **OK**.
- 13. To close Page Composer, click **Close**.
- 14. Test your new saved search.
- 15. Publish your sandbox to make the saved search available to channel managers.

## Browse the Sales Catalog from Deal Registration Pages

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

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

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

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

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

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

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

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

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



# 8 Manage Partner Opportunities

## Overview

Partner-related opportunities use channel organizations to enable alliances, achieve growth and expand strategies faster, and maximize sales through broader territory coverage. By offering the right opportunities to the right partner accounts, channel organizations can avoid channel conflict and increase revenue in their indirect sales channel.

Partner opportunities have the following benefits:

- Partner opportunities allow the channel sales force and partner accounts to work together and share information effectively as a team.
- Partner opportunities provide a means of measuring the progress of a partner account, and thus compensate fairly based on the partner account involvement.
- Partner opportunities help revenue from partner opportunities to be more accurately forecasted by brand owners.

## How Partner Accounts Are Added to Opportunities

An opportunity can have more than one partner. Partners are added on the Partners subtab of the Edit Opportunity page. You can use the Partner column to select a partner for each revenue line.

**Note:** The Partner subtab on the Edit Opportunity page and the Partner column of the revenue line aren't available by default. Your sales administrator must provide the security configuration and make them available.

The following table shows possible scenarios in which partners become involved in opportunities.

Scenario	Description
A channel account manager adds the partner account to an internal opportunity.	The channel account manager can locate unassigned opportunities, review the details of the opportunities, select the most appropriate partner account for each opportunity, and designate a primary partner for the opportunity. The channel team can then monitor the opportunity progress.
A partner lead is converted to an opportunity by the partner or channel organization.	Partner salespeople can convert leads to opportunities. After they're accepted, leads assigned to partners can be converted to an opportunity based on the lead qualification outcome, such as Interest, Budget, and Purchasing Time Frame.
A partner account creates an opportunity.	The partner account is the opportunity owner. The channel account manager gains visibility to the partner created opportunity when the channel account manager is added to the opportunity team by the partner user or through the use of Territory-Based Assignment on the Opportunity revenue line. The channel account manager becomes the credit receiver for the revenue roll up and forecasting.
A deal registration is converted into an opportunity upon approval of the deal registration.	A partner submits a deal registration to the channel organization for approval. When the deal registration is approved, it's converted into an opportunity for the partner.

**Note:** By default, partners are assigned to opportunities using territory-based assignment.

## Partner Lead Attributes in Opportunities

Leads can be converted to deal registrations which can then be converted to opportunities, or leads can be converted directly to opportunities.

Partners can use the Lead to Deal Registration Conversion feature on the Lead Deal Registrations subtab to convert a lead to a deal registration. When a lead is converted to a deal registration, the lead details and team members are copied to the deal registration, any associated deals are shown on the Lead Deal Registrations subtab, and the Lead is stamped on the deal registration.

When a registered lead is converted directly to an opportunity, lead attributes, such as sales account, products, revenue amount, primary partner contact, and registration type, are carried over to the newly created opportunity.

The following table lists the mapping of general lead attributes carried over into opportunities at the header (opportunity) level.

Lead Attribute	Opportunity Attribute
Name	Name
Sales Account	Sales Account
Estimated Close Date	Estimated Close Date
Date Approved	Creation Date
Expiration Date	Expiration Date
Deal Approved By	Owner
Deal Approved By Resource Org	Resource Org
Budget Status	Budget
Budget Amount	Budget Amount
Currency Code	Currency Code
Partner	Partner
Partner Type	Partner Type

Lead Attribute	Opportunity Attribute
Partner Program	Partner Program
Owner	Primary Partner Resource

The following table lists the mapping of lead contacts attributes to opportunity contacts attributes.

Lead Attribute	Opportunity Attribute
Contact	Contact
Contact Role	Contact Role
Primary	Primary

The following table lists the mapping of lead products attributes to opportunity revenue line attributes.

Lead Attribute	Opportunity Attribute
Product	Product
Product Group	Product Group
Currency Code	Currency Code
Quantity	Quantity
Unit Price	Unit Price
Amount	Revenue Amount
Unit of Measure	Unit of Measure
Estimated Close Date (header)	Close Date

## Partner Visibility into Opportunities

By default, the channel account manager who owns the partner account automatically has visibility into all opportunities that his partner creates. On these opportunities, the channel account manager can see all the partners associated with the opportunity using the partner subtab.

He can also view the primary partner on the opportunity summary page and on the revenue line (if the partner is exposed with Page Composer).

Partner users can view all opportunities they created as they become the owners of these opportunities. They can also see opportunities where they're part of the sales team. When creating opportunities, partner users can only use the accounts and contacts that have been shared by the brand owner or that they own. For the accounts and contacts that are shared, the administrators can configure the access to be view-only.

While partner users can select accounts and contacts they have access to, administrators can enable validation to prevent partner users from changing certain attributes.

Additionally, partner users can only view resources from their own company on the opportunity team. Any additional internal resources or resources that belong to other partners on the team are hidden. Similarly, the resource selector on the team tab is also limited to show only the resources that belong to their partner company.

## Check for Duplicate Opportunities

Partners register deal so they can have exclusive rights to pursue the deal. After the deal registration is qualified and registered, the partner submits it to the channel account manager for approval.

Channel account managers can use the Check for Duplicates action on the Edit Deal Registrations pages to search for potentially matching unassigned opportunities.

## FAQs About Partner Opportunities

### Why can't I see the Partners tab and Primary Partner field when I edit an opportunity?

When editing an opportunity, you need the right privileges to see partner information. The Primary Partner field and Partner subtab are secured by the privilege MOO\_MANAGE\_OPPORTUNITY\_PARTNERS\_PRIV and are only visible to users who have a job role that includes this privilege.

# 9 Manage Marketing Development Funds (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"> <li>• The MDF budget is activated.</li> <li>• An MDF request associated with the budget is approved.</li> <li>• An MDF request associated with the budget is terminated.</li> <li>• More funds are added to the budget.</li> </ul>
Total Budget	This attribute is calculated whenever the following happens: <ul style="list-style-type: none"> <li>• The MDF budget is activated.</li> <li>• More funds are added to the budget.</li> </ul>
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.
Submitted Claims	This attribute is calculated when an MDF claim associated with a budget is approved or rejected.



Attribute Display Name	Calculation Trigger
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	<p>This attribute is calculated whenever the following happens:</p> <ul style="list-style-type: none"><li>• The MDF request is approved.</li><li>• An MDF claim associated with the MDF request is terminated.</li></ul>

## 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	This attribute is calculated whenever the following happens: <ul style="list-style-type: none"><li>• The MDF claim is approved.</li><li>• A settlement associated with an MDF claim is complete.</li></ul>

## MDF Audit Report for Channel Managers

Sales administrators and channel managers can use the MDF audit reports to track any changes to standard and customer-defined attributes of both parent MDF objects and their child objects.

You can track new, updated, and deleted records for the MDF objects and for the attributes of the MDF objects that are enabled for auditing.

For each of your MDF records, you can also track what attribute was changed, including both the old and the new value, when it was changed, and who changed it - even if the change was made by an impersonator.

The MDF audit features aren't included with shipped job roles and these features aren't automatically available. Sales Administrators must first configure functional security to determine which role or roles can configure MDF audit, and which role or roles can create audit reports. Before you can run the MDF audit report, sales administrators or channel operations managers must also select which MDF objects are turned on for audit and build the audit report.

### What Is Audited for MDF?

The following table shows which child objects are audited for each MDF object, including MDF Budget Team and MDF Budget Countries for MDF Budget, MDF Request Team for MDF Request, and MDF Claim Team and MDF Claim Settlement for MDF Claim.

MDF Object Name	Audited Object
MDF Budget	MDF Budget Team
MDF Budget	MDF Budget Countries
MDF Request	MDF Request Team

MDF Object Name	Audited Object
MDF Claim	MDF Claim Team
MDF Claim	MDF Claim Settlement

## Build and Run the MDF Audit Report

Audit data is available as of the day the object and attributes were enabled.

Sales administrators and channel operations managers can follow these steps to build, run, and export the MDF audit report.

1. Sign in with your Sales Administrator or Channel Operations Manager credentials.
2. From the Navigator, click the **Audit Reports** link.
3. On the Audit Reports page, set the parameters for the audit report, including:
  - a. Enter the dates for the period of time you want to audit. You can select before or after a specific date, a specific date, or a date range.
  - b. You can choose to track all changes made by a specific user on any object including the MDF objects for which audit is activated.
  - c. You can choose to track changes made by a specific user on all MDF objects under the Marketing product.
  - d. You can choose to track changes made by a specific user on a specific MDF object under the Marketing product.
  - e. You can choose to track changes made by any user on all MDF objects under the Marketing product.
  - f. You can choose to track changes made by any user on a specific MDF object under Marketing product.
  - g. You can choose to track changes by all events or specific events, such as Object Data Insert, Object Data Update, Object Data Delete.
  - h. You can choose to track changes made to the child objects of the MDF objects.
  - i. You can search for changes by description. The text you type in the Description field is matched against the attribute specified for each MDF object. For example, if you type 005, then the application searches for Budget Codes with 005, Resource IDs with 005, and so on.

The following table shows the attribute name you can use to search for each MDF object.

MDF Object Name	Attribute
MDF Budget	Budget Code
MDF Budget Team	Resource ID
MDF Budget Countries	Country Code
MDF Request	Fund Request Code

MDF Object Name	Attribute
MDF Request Team	Resource ID
MDF Claim	Claim Code
MDF Claim Team	Resource ID
MDF Claim Settlement	Number (This number is the Claim Settlement ID and it's displayed on the UI).

4. Run the search.

The default MDF audit report returns the following information:

- The date the change was made
- The user who made the change
- The event type
- The MDF object that was changed
- A description of the change.

5. To see whether changes were made by an impersonating user, select the **Show Impersonator** check box.

6. To see the attribute details, select the **Show Attribute Details** check box and either select **All Attributes** or specify the individual attributes to be displayed in the following new columns:

- Attribute
- Old Value
- New Value

7. To see additional MDF object attributes in addition to the field that was changed, select the **Show Extended Object Identifier Columns** check box and the information appears in the following new columns:

The following table shows the extended object identifier columns and values for each MDF business object, including MDF Budget, MDF Request, MDF Claim, MDF Claim Settlement, MDFBudget Team, MDF Request Team, and MDF Claim Team.

Business Object Type	Context Name1	Context Name2	Context Name3
MDF Budget	Name	Type	Owner
MDF Request	Name	Partner	Owner
MDF Claim	Name	Partner	Owner
MDF Claim Settlement	Name	Partner	Amount

Business Object Type	Context Name1	Context Name2	Context Name3
MDF Budget Team	Name	Organization	Role
MDF Request Team	Name	Organization	Role
MDF Claim Team	Name	N/A	Role

8. To export the audit report to Microsoft Excel, select the **Export** action from the Action menu.

## Export MDF Objects and Attributes

Sales administrators and channel operations managers can export MDF object data to a file so they can update balances or process claims externally with third-party financial tools.

They can also perform mass updates to MDF Budget teams, MDF Request teams, and MDF Claim teams (team ownership, team members, team access level or function) then import the new teams.

The column headers in the output file are recognized when you reimport your MDF objects, which allows the import process to automatically map the MDF object values.

Sales administrators and channel operations managers can export the following:

- All MDF Budget objects (MDF Budget, MDF Budget team, MDF Budget Countries).
- All MDF Request objects (MDF Request, MDF Request team).
- All MDF Claim objects (MDF Claim, MDF Claim team, MDF Claim Settlement).

You can reimport all exported files without changing the file format.

Sales administrators and channel operations managers can use these steps to export their MDF data.

1. Sign in with your Sales Administrator or Channel Operations Manager credentials.
2. From the Navigator, click **Setup and Maintenance**.
3. In the Setup field, select **Sales**.
4. In the Functional Areas region, click **Data Import and Export**.
5. Search for and select the **Manage File Export Activities** task.
6. Click the **Create** icon to create a new export activity.
7. On the Create Export Process Definition: Enter Basic Information page, provide a name for your export activity.
8. From the Parent Objects list, select **MDF budget**, **MDF request**, or **MDF claim** depending on which MDF object data you want to export.
9. In the File Name field, provide a name for the export file, such as MDF Budget Export, or MDF Request Export.
10. Click **Next**.
11. On the Create Export Process Definition: Review page, choose the child or customer-defined objects you want to include in your export file.
12. In the Edit Filter Criteria column, click the icon and specify the date after MDF data will be included in the export, and provide a name for this new saved search.
13. Click **Save**, then click **OK**.

14. On the Create Export Process Definition: Review page, click **Next**.
15. Select if you want to export the data immediately, or schedule to export process to run at a later time.
16. If you selected Immediate, then click **Activate** to start the export activity. If you selected to schedule the export for a later time, then click **Save and Close**.
17. After the export process completes, you can see the export file in the History region of the Manage File Export Activities page.
18. In the Exported data file column, click the file name to open it.

## Create a Pending My Approval Saved Search for MDF Objects

Channel managers and other MDF object approvers can use a record set in the advanced search page to create a Pending My Approval saved search for MDF objects, including MDF requests and MDF claims.

This saved search shows all MDF requests or MDF claims that are pending approval by the signed in approver.

Channel managers and other MDF object approvers can use these steps to create a Pending My Approvals saved search for MDF requests or MDF claims and set it as their default search.

1. Sign in with your credentials.
2. Click **Partner Management**.
3. Click **MDF**.
4. Click the MDF Requests or MDF Claims tab, depending on which MDF object you want to create the saved search for.
5. On the selected MDF object page, click **Show Advanced Search**.
6. Provide the following search criteria:
  - Record Set equals **Pending my approval**
  - Status equals **Pending Approval**
7. Click **Save**.
8. In the Create Saved Search dialog box, type a name for the saved search, such as Requests Pending My Approval or Claims Pending My Approval.
9. Select the **Set as Default** check box to make this search the one that loads when you view the page.
10. Select the **Run Automatically** check box if you want to run the search automatically when this search is loaded.
11. Click **OK**.

Your new saved search appears in the Saved Search list.

## MDF Request and MDF Claim Approvals

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

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

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

## View Approval History Information

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

Type of Information Shown	Details
Current Assignee	<p>The current assignee can do the following:</p> <ul style="list-style-type: none"><li>• View assignee information, including both the current and future assignees.</li><li>• If the MDF request or MDF claim is assigned to one or more users, then the full person name for each assignee is shown, including the date and time.</li><li>• If the MDF request or MDF claim is assigned to one or more approval groups, then each user in the group is displayed.</li><li>• If the MDF request or MDF claim is assigned to one or more job roles, then the role name for each role is displayed separately, including the date and time.</li><li>• If an approval stage for the MDF request or MDF claim has multiple approvers, the current assignee can identify which approvers are required to approve in that stage.</li></ul>
Actions Performed	<p>Actions performed information is displayed chronologically, starting with the latest action performed.</p> <p>Approval history tracks the following performed actions:</p> <ul style="list-style-type: none"><li>• Submitted by</li><li>• Approved by</li><li>• Returned by (Return reason and Comments if provided by approver)</li><li>• Rejected by (Reject reason and Comments if provided by approver)</li><li>• Withdrawn by</li><li>• Delegated by</li><li>• Escalated by</li><li>• Reassigned by</li></ul>
Future Approvers	<p>Future approvers can be users, groups of users, or job roles.</p> <p>If the future approver is a user, then the full person name for each approver is shown. If the future approver is a job role, then the descriptive name of the role is shown. Users with the specified role won't be shown.</p>

## MDF Requests and Claims Approval

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

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

- Approve
- Reject



- Return

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

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

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

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

## FAQs About MDF

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

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

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

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

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

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

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

# 10 Manage Partner Programs

## Define a Partner Program

The process for defining a partner program involves the following steps:

1. Create or Update a Partner Program.

Channel managers define the case for the program, indicate the benefits, and costs to maintain the program over its term. They also determine the scope of availability of the program by using countries. Channel managers can also establish goals or targets for the program, like: enrollments, units sold through, market coverage growth. Channel managers work with a number of internal functions like channels marketing, strategy, operations, and business practices to define the characteristics and proposed roll out schedule of a program.

**Note:** The process of defining a program can span over weeks or months.

2. Define or update program summary.

Channel managers define the program summary information and set the program to Draft status. The program can be partially saved at any point in the process. Channel managers design the offering to position and sell the program to prospective partners.

3. Define or update program benefits.

Channel managers can also define the proposed benefits for the program.

4. Publish the program (submit it for approval).

5. Review Program for Approval.

Workflow approvals are then submitted to the manager to review the program as defined, and approve the program for release or publication. Approvers do the following:

- a. Receive a notification of pending workflow item.
- b. Open the item and review the summary, benefits, and tiers.
- c. Approve or reject, programs using configurable approval workflows.

Channel managers can release the program when it's approved.

## Partner Program Actions and Status

A partner program can have different statuses during its life cycle. The program's status determines the actions you can take on the program.

The following table shows the partner program actions and a description of each.

Action	Description
Create	Select this action to create a new partner program.
Delete	Select this action to remove a partner program. You can only delete programs that are in Draft status.
Terminate	Select this action to end the partner program but not delete it.
Withdraw	Select this action to withdraw a submitted partner program.
Publish	Select this action to publish a program. A partner program in Published status is active and partners can enroll into it.

The following table shows the partner program statuses and a description of each.

Status	Description
Draft	This is the initial status for newly created programs. This is also the state to which programs return when they're unpublished (or withdrawn from a customer-defined approval workflow - if configured).  The channel organization can delete programs in Draft status.
Pending	This status indicates that the partner program is undergoing approval processing. When programs are in this state, you can't edit them except for modified fields specifically configured for editing in this state.
Failed	The partner program enters this state if the approval process fails. You can edit programs in this state.
Rejected	If you're using modified approval rules to route programs to another user for approval and that approver rejects the program, the program enters this state. You can edit programs in this state.
Published	This status indicates that the partner program is active and is open for enrollment to partners. When programs are in this state, you can't edit them except for customer-defined fields specifically configured for editing in this state.
Terminated	This state means the program has been terminated, either manually through a user action, or automatically upon the program's end date. When programs are in this state, you can't edit them except for customer-defined fields specifically configured for editing in this state.

**Note:** The channel organization can review partner programs that are in Draft, Failed, or Terminated status.

## Partner Program Approval

By default, partner programs are automatically approved after the user selects the Publish action. When the program is approved, it's immediately published and ready for partner enrollments. However, if you're using modified workflows for approval, the following occurs:

The approver receives a notification and opens and reviews the partner program. The approver can then approve or reject the program. When the partner program is approved, it's automatically released for enrollment and the program status changes to Published.

**Note:** The approval process may take days, weeks, or months to reach the point where programs are ready for approval and release.

## Eligibility Criteria for Partner Programs

Channel managers can define the eligibility criteria for a partner program, so the manager can identify partners to invite to this program.

Programs can be targeted to partners based on:

- Geography served
- Number of customers served
- Industry and product focus
- Membership in other programs
- Metrics associated with the partner, such as the number of training classes taken, expertise in a product, size of the partner organization and so on

## Partner Program Benefits

Channel managers define the benefits for a partner program, such as:

- Additional incentives for deal registration
- Access to product sales and marketing collateral
- Free training
- Platinum support

## Scenario

A channel manager creates a partner program with benefits like free training and platinum support.

## Manage Partner Programs for Channel Managers

Partner programs represent relationships between you, the brand owner or channel company, and different types of qualified partners, such as re-sellers, systems integrators, and distributors.

You can make partner programs global or specific to a country, and you can choose to use a tiered structure in your programs if you want. Partner programs provide benefits to approved partner enrollees.

Channel managers working for the brand owner must first create a program and tier structure to define a partner's position in the program. You can base the partner's position on the partner's investment in the relationship, which you can determine from different criteria such as revenue, competencies, and customer satisfaction.

The partner program structure also provides consistency across the globe, and aligns partners with the correct programs. Appropriate benefits - whether financial, sales, marketing, technical, training, or other types of resources - can be offered to partners according to their level of investment, as reflected in the partners' tiers, to ensure the brand owner's investment in the partners is worth the cost.

You can use the partner relationship management functionality to define a global program structure, with or without tiers, streamline the program approval process, and group partners into that structure. You can also define and assign benefits to partners based on their position in your partner programs. Channel managers gain increased visibility into the partner benefits and program elements. They can promote or demote partners, as needed. You can quickly adjust your partner programs as your business changes and grows.

Channel managers can use the Programs pages to:

- Set up a program structure to distinguish and reward your partners, based on their performance and contributions to your business.
- Define partner programs with or without tiers, and add benefits from a benefits library to programs or program tiers.
- Assign tiers to partner accounts, and enforce country-based and tier-based eligibility when enrolling partners in different programs.

## Create Partner Programs

Use these steps to create a partner program.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. Click Create Program.
3. In the **Name** field, provide a name for the program you're creating.
4. From the **Type** list, select the type of program you're creating, such as Technology Partner, Re-seller, or Distributor. This is the type of partner you're targeting with the program.
5. From the **Owner** list, select the owner of the program you're creating.
6. If you want to designate the program for a specific country, you can select the country from the **Country** list. Selecting All will allow the program to be global.
7. If you want the program to begin or end on a specific date, you can use the **Start Date** and **End Date** fields to indicate the date.
8. If you don't want to publish your partner program, click **Save and Close**. Otherwise, click **Save and Continue**.
9. If you clicked **Save and Continue**, you can now publish the program by selecting the **Publish** action.

## Create Tiers

Use these steps to create tiers.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. Click the **Tiers** tab.
3. On the Tiers page, click **Add**.
4. Provide a name for the tier.
5. Select a badge for the tier. The badge is an icon used to quickly identify the tier.
6. Click **Save** to save your work.
7. Click **Add** to create additional tiers. If you have multiple tiers, you can use the ordering arrows, to move tiers up or down.
8. Click **Save** to save your work.

## Add Tiers to a Partner Program

Use these steps to add tiers to a partner program.

**Note:** Tiers must already exist before you can add them to partner programs.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. From your list of programs, select the program you want to add tiers to.
3. On the program Summary page under the Tiers section, click **Add and select the tier you want to add to the program**.
4. Click **Save and Close** to save your work.

## Delete Tiers

Use these steps to delete tiers.

**Note:** You can only delete a tier after it has been removed from all partners and programs that are using it.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. Click the **Tiers** tab.
3. On the Tiers page, click the X corresponding to the tier you want to delete.
4. Click **Save** to save your work.

## Create Benefits

Use these steps to create benefits.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. Click the **Benefits** tab.
3. On the Benefits page, click **Create Benefit**.
4. Provide a name for the benefit.
5. From the **Value Type** list, select the type of value the benefit provides, such as Amount, Number, or Percent.
6. From the **Category** list, select the category that your benefit fits into.
7. In the **Description** field, you can type a short description of the benefit.
8. Click **Save and Close**.
9. Click **Save** to save your work.

10. Click **Add** to create additional tiers. If you have multiple tiers, you can use the ordering arrows, to move tiers up or down.
11. Click **Save** to save your work.

## Add Benefits to a Partner Program

Use these steps to add benefits to a partner program.

**Note:** Benefits must already exist before you can add them to partner programs.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. From your list of programs, select the program you want to add benefits to.
3. Click the **Benefits** tab.
4. On the program Summary page under the Benefits section, click **Add and select the benefit you want to add to the program**.
5. You can use the Tier list to make the benefit specific to a certain tier of the partner program.
6. Click **Save and Close** to save your work.

## Delete Benefits

Use these steps to delete benefits.

**Note:** You can only delete a benefit after it has been removed from all partners and programs that are using it.

1. Sign in with your channel manager credentials and from your Partner Management area, click **Programs**.
2. Click the **Benefits** tab.
3. From your list of benefits, select the benefit you want to delete.
4. On the Edit benefit page, click **Delete Benefit**.
5. Click **Save** to save your work.

## 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.

## FAQs About Partner Programs

### What are benefit value types?

Partner program benefit value types determine how the benefit is linked to a partner program or a program tier.

A benefit can be associated with the following types of values:

- Amount: For example, \$1000.00 off the value of the first order over \$100,000.00.
- List: Permits you to define a list of values for the benefit. When you add a list value type to a program, you choose a value for the row from a set of values you created.
- Number: For example, Platinum level support for the first five issues.
- Percent: For example, 10% off the first five orders from a new market.
- Text: An open field in which you can type any value you want.
- Yes/No: For example, Yes or No for free training.

### Can I create a benefit?

Users with the channel operations manager job role can define partner program benefits. Benefits communicate the value of the program to your partners. Partners are eligible for the benefits when their enrollment in your partner program is approved.

### Why can't I find a partner program that I approved?

After you approve a partner program, another user in your channel organization can change the status to Draft and delete the program. So, even though you approved the partner program, you might not be able to find it.



# 11 Manage 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.

## Create, Submit, and Approve Enrollment Requests

Channel operations managers can use a simplified list of partner program enrollments, across all of their partners or by individual partner, to easily manage the enrollments for their partner accounts.

Channel operations managers can quickly create new enrollments, submit them for approval, and approve them.

Use these steps to create a new program enrollment request for a partner account.

1. Sign in with your channel operations manager credentials.
  2. Click **Enrollment**, and click **Create Enrollment**.
  3. On the Create Enrollment page, provide the necessary information about the program enrollment.
  4. Click **Save and Continue**.
  5. On the Edit Enrollment Summary page, verify the enrollment request information and click **Submit**.
  6. Click **Save and Close**.
  7. On your springboard, click **Notifications**.
  8. From your list of recently created enrollment requests, search for and select the new enrollment request.
  9. Select the new enrollment request, and click **Claim** in the dialog box.
  10. From the Actions menu, select **Approve**.
- Your new enrollment now appears in your main list of enrollments.

## Options for Renewing a Partner Program Enrollment

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

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

### Enrollment Renewal Process

Partner program enrollment renewal is available:

- Within the expiration term, to partners

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

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

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

## Terminated Programs

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

# Renew Partner Program Enrollments

Channel account managers frequently renew program enrollments for their partners. When renewing program enrollments, channel operations managers may reach out to the account manager or channel manager for help in making sure that renewal request can be approved.

Use these steps to renew a program enrollment for a partner user:

1. Sign in with your channel account manager credentials.
2. In the Partner Management area, click **Enrollments**.
3. From your list of enrollments, search for and select the enrollment you want to renew.
4. From the Actions menu, select **Renew**.
5. On the Renew Enrollment page, verify the information is accurate.
6. From the Actions menu, select **Submit**.
7. On your springboard, click the **Notifications** icon.
8. From your list of recently created enrollment renewal requests, search for the new enrollment renewal request.
9. Select the new enrollment renewal request, and click **Claim**.
10. From the Actions menu, select **Approve**.

You should now be able to see your renewed enrollment in your main list of enrollments.

## FAQs About Partner Program Enrollment

### What's a partner program enrollment term?

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

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

## What enrollments does selecting My Partners' Enrollments display?

When you select the My Partners' Enrollments list in the Partners work area, the application displays a list of enrollments for partners where you're on the partner team.

You're automatically on the partner team if you created the partner or you can be assigned to the partner team either by another team member or an automatic process.

## What enrollment records do the different record sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of information.

Here's a list of the record sets available for enrollment. Not all record sets are available to all users.

**Tip:** To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records where you're on the team. Or restrict your searches to a smaller geographical area. For example, search all the partner enrollments in one state instead of the whole country.

Record Set Name	Description
I am on the team	Accounts where you're on the team. You're on the team if you're the account owner or were added as a member by another team member.
All records I can see	Program enrollments you can view based on your partner team membership, internal territory assignments, my position in the organization, and security permissions.
I am the program owner or manager	Accounts that you can view based on your account team membership, sales territory assignments, your position in the organization, and security permissions.

## What happens if I don't specify a start date for a partner program enrollment?

The approval date is set as the start date for partner program enrollment. The start date can't be later than the active dates for the partner program.

## What's a term expiry warning?

The number of days, weeks, or years from the partner program enrollment end date when a partner is notified of an expiring enrollment and is sent a renewal notification template.

By default, the term expiry warning is set to 30 days, 60 days, or 90 days. For example, if the term expiry warning is set to 90 days and if the enrollment will expire on January 01, 2012, then the renewal notification is sent 90 days prior to this date on October 01, 2011.



# 12 Manage Partner Assets

## Overview of Partner Assets

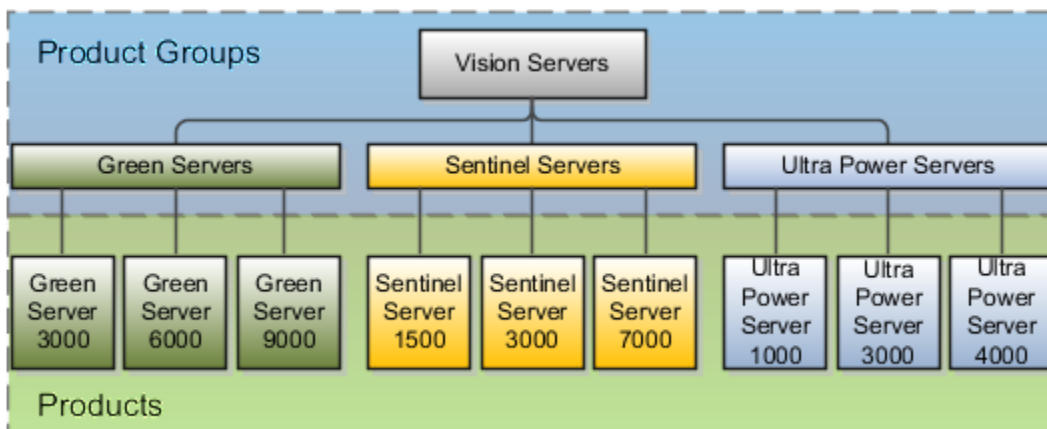
A partner asset is a specific instance of a product owned by a partner account.

Partner assets can be specific instances of ownership for tangible products like computers, automobiles, or equipment parts, or they can be contracts for intangible things like services, software, or licenses and agreements.

Partner assets must be associated with a product or product group.

- **Product:** Products are the individual goods and services the partner account sells, for example Green Server Model 3000.
- **Group:** Product groups can represent a group of products or an individual product, however they're usually used to group related products together into a single category so that you can more easily work with them. Channel managers and partners can use product groups and products to create an asset hierarchy for your products. For example, you can have a product group named Servers that includes every line of servers that your company offers for the partner to sell. Within that product group, you can create a child product group for each line of your servers, such as Green Servers, Sentinel Servers, and Ultra Power Servers. Each of these product groups can contain the different server models that constitute that line of servers.

The following figure gives an example of how to use product groups and products to organize assets.



Channel managers can use the Assets subtab on the Partner details pages to manage assets for their partner accounts. Partners can manage their assets by clicking Assets directly from their home page on the channel organization's Oracle Cloud applications.

## Partner Asset Subtabs

Subtabs on the Assets pages provide channel managers and partner sales representatives with the following information:

- **Summary:** Provides a summary of the asset.
- **Team:** Provides information of team members associated with the asset.

- **Contacts:** Provides information of contacts associated with the asset. Use this tab to add additional contacts to the asset or remove existing contacts from the asset. You can either search for an existing contact or create a contact.  
**Note:** If the asset is associated with a single contact, then that contact is the primary contact.
- **Opportunities:** Enable you to view opportunities for the asset. An asset can have multiple opportunities. However, an opportunity can't have multiple assets.
- **Leads:** Enables you to view leads for the asset. An asset can have multiple leads. However, a lead can't have multiple assets.
- **Service Requests:** Enables you to view an add service request tickets related to the asset.

## Manage Partner Assets for Channel Managers

Channel managers can use the Assets subtab on the Partner details pages to do the following:

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

### Create or Edit Partner Assets

Channel managers can use these steps to create or edit assets for their partners:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner you want to have an asset.
4. Click the **Assets** subtab.
5. To create an asset, click **Create Asset**. To edit an asset, click the **Asset Number** for the asset you want to edit.
6. Verify or edit information in the following fields.

The following table shows the fields on the Create Asset page.

Field Name	Description
Asset Owner	This field is automatically populated with the name of the partner account you're currently viewing.
Asset Number	This field indicates a unique identification number for the asset. This number is automatically generated. However, it can be overwritten.

Field Name	Description
Serial Number	If the asset includes a serial number, you can type it in this field.
Description	Use this field to provide a description of the partner asset.
Status	Use this field to indicate the status of the asset. Valid values are Active and Retired. When you create an asset, the default value is Active.
Product Type	Use this field to indicate whether the asset is a product or product group. The default value is Product.
Product	Use this field to select the product or product group you're creating for the partner. The values in this field change based on your selection in the Product Type field.

7. Click **Save and Continue**.
8. You see the following additional fields.

The following table shows the additional fields you see on the Create Asset page after you click **Save and Continue**.

Field Name	Description
Product Description	This field provides a read-only description of the asset.
Price	Use this field to provide a unit price for the asset.
Quantity	Use this field to indicate the total number of this specific asset that the partner has.
Start Date	Use this field to indicate the date on which the partner assumes ownership of the asset.
End Date	Use this field to indicate the date on which the asset no longer belongs to the partner.
Attachments	Use this field to attach additional materials to the partner asset.

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

## Add Team Members to an Assets Team

Channel managers can use these steps to add team members to an asset team for their partners:

1. Sign in with your channel manager credentials.

2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the asset you want to add team members to.
4. Click the **Assets** subtab.
5. On the Assets page, click the **Asset Number** for the asset you want to add team members to.
6. On the Edit Asset page, click the **Team** subtab.
7. On the Asset Team page, select or create the account for the team member that you want to add to your partner's asset.
8. Save your work.

## Add Contacts for an Asset

Channel managers can use these steps to add a contact to one of their partner's assets:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the asset you want to add a contact to.
4. Click the **Assets** subtab.
5. On the Assets page, click the **Asset Number** for the asset you want to add a contact to.
6. On the Edit Asset page, click the **Contacts** subtab.
7. On the Asset Contacts page, select or create the contact that you want to add to your partner's asset.
8. Save your work.

## Create Leads, Opportunities, or Service Requests for an Asset

Channel managers can use these steps to create a lead, opportunity, or service request for one of their partner's assets:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the asset you want to create a lead, opportunity, or service request for.
4. Click the **Assets** subtab.
5. On the Assets page, click the **Asset Number** for the asset you want to create a lead, opportunity, or service request for.
6. On the Edit Asset page, click the one of the following:
  - Lead subtab
  - Opportunity subtab
  - Service Request subtab
7. Provide any required information for the lead, opportunity, or service request.
8. Save your work.

## Export a List of Partner Assets

Channel managers can use these steps to export a list of their partner's assets:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the assets you want to export a list of.
4. Click the **Assets** subtab.

5. On the Assets page, click **Export**.
6. Indicate where you want to save the exported list of your partner's assets.
7. Save your work.

## Delete an Asset

When channel managers delete an asset, they're deleting the relationship between the asset and the partner account. Channel managers can use these steps to delete an asset from their partner account:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the asset you want to delete.
4. Click the **Assets** subtab.
5. On the Assets page, click the **Asset Number** for the asset you want to delete.
6. From the **Actions** menu, select **Delete**.
7. Save your work.

## Reinstate an Asset

Channel managers can use these steps to reinstate an asset for their partner:

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the asset you want to reinstate.
4. Click the **Assets** subtab.
5. On the Assets page, click the **Asset Number** for the asset you want to reinstate.
6. From the **Actions** menu, select **Reinstate**.
7. Save your work.



# 13 Manage Partner Relationships

## Partner Hierarchies

Partner hierarchies provide a consolidated view of the organization of partner companies.

Channel managers can use the Hierarchy pages on the Relationships subtab to gain a more complete view of their partner, from the headquarters of the partner company down to the individual account level.

**Note:** While it's possible to view and create partner hierarchies on either the partner's Relationships subtab (Show Hierarchy UI) or by using the Manage Hierarchies UI in FSM, changes made in the FSM task do not appear on the Partners UI. The recommended approach is to use only the Partner UI to create and manage your partner hierarchies.

The Hierarchy page has both a graphical chart view and a table view for partner hierarchies. You can click the view icons located in the upper right of the Hierarchy page to alternate between views.

The following table shows what you can see and do in each of the two views on the Hierarchy page.

Graphical (Chart) View	Table View
See the hierarchy and the current active hierarchy version.	See the hierarchy and the current active hierarchy version.
Use the Control Panel tools to change the hierarchy layout, move the hierarchy around, center the hierarchy in the view, and increase or decrease the amount of zoom.	See the Type, Location, and Primary Contact for each node in the hierarchy.
Use the carousel view scroll between three pages of information for the partner, including:  Page One <ul style="list-style-type: none"><li>Offered Leads</li><li>Pending Deal Registrations</li><li>Open Opportunities</li><li>Active Enrollments</li></ul> Page Two <ul style="list-style-type: none"><li>Type</li><li>Status</li><li>Owner</li></ul> Page Three <ul style="list-style-type: none"><li>Contacts</li></ul>	N/A

Graphical (Chart) View	Table View
<ul style="list-style-type: none"> <li>Primary Contact</li> </ul>	
Add or remove a node from the hierarchy (with the exception of the currently selected partner).	Add or remove a node from the hierarchy (with the exception of the currently selected partner).
Move a node (and its children) to a different hierarchical level by clicking and dragging the node.	Move a node (and its children) to a different hierarchical level by clicking and dragging the node.
Add a partner to the hierarchy. You can't add a partner to a hierarchy if the partner already belongs to that hierarchy.	Add a partner to the hierarchy. You can't add a partner to a hierarchy if the partner already belongs to that hierarchy.
See the parent and children for the selected partner. You can see up to five nodes for each level and you can navigate through and expand each level in the hierarchy.	N/A

## Add a Parent Partner

Adding a parent partner creates a parent-to-child hierarchy between the two partners. You can add a parent partner from the partner's Profile subtab or from the partners Relationships subtab. Use the following steps to add a parent partner to a selected partner.

Add a parent partner from the Profile page:

1. Sign in with your Channel Account Manager credentials.
2. Click **Partners**, and select a partner from the list.
3. Click the **Profile** subtab and click the **Search** icon in the **Parent Partner** field.
4. On the Select Parent Partner page, search for and select the partner you want to add as a parent.
5. Click **OK**.

You return to the Profile page and the selected partner appears in the Parent Partner field.

Add a parent partner from the Hierarchy page:

1. Sign in with your Channel Account Manager credentials.
2. Click **Partners**, and select a partner from the list.
3. You can either click the **Profile** subtab and click the Hierarchy icon next to the **Parent Partner** field, or you can click the **Relationships** subtab and select **Hierarchy** in the Show list.
4. On the Hierarchy page, click the Actions list for the partner and select **Add Parent**.
5. On the Select Parent Partner page, search for and select the partner you want to add as a parent.
6. Click **OK**.

## View a Partner Hierarchy

Channel managers can use these steps to view a partner hierarchy:

1. Sign in with your Channel Account Manager credentials.



2. Click **Partners**.
3. Search for and select the partner you want.
4. On the Edit Partner page, you can view the partner hierarchy by doing one of the following:
  - Click the **Profile** subtab and click the **Hierarchy** icon next to the Parent Partner field.
  - Click the **Relationships** subtab and select **Hierarchy** from the Show list.

The Hierarchy page appears, displaying the selected partner in graphical view.

5. You can use the view icons to switch between Chart (Graphical) and Table views.
6. When you're in Chart view, you can click the Layout icon in the Control Panel to switch between the following layouts:
  - Vertical, Top Down
  - Horizontal, Start-to-End
  - Tree
  - Radial
  - Circle

## Create a Partner Hierarchy

Use the steps below to create a hierarchy for your selected partner.

1. Sign in with your Channel Account Manager credentials.
2. Click **Partners**, and select a partner from the list.
3. On the Edit Partner page, you can access the partner hierarchy by doing one of the following:
  - Click the **Profile** subtab and click the **Hierarchy** icon next to the Parent Partner field.
  - Click the **Relationships** subtab and select **Hierarchy** from the Show list.

The Hierarchy page appears, displaying the selected partner in Chart (graphical) view.

4. From the Action menu, select **Add Child**.
5. Search for and select the child partner you want to add.
6. Continue adding partners to your hierarchy.
7. Click **OK**, then click **Save and Close** to save your changes.

## Manage Partner Relationships

Channel managers can use the Relationship subtab to manage multiple partner relationships, such as the relationship between re-sellers and distributors. Channel managers can view existing relationships the partner has, and add new relationships to other accounts, contacts, or partners.

They can also add comments to each relationship for the selected partner.

## View Your Partner Relationships

Channel managers can use these steps to view existing relationships for the partner:

1. Sign in with your Channel Account Manager credentials.

2. Click **Partners**.
3. Search for and select the partner you want.
4. Click the **Relationships** subtab.
5. In the Show field, select **Relationships** (if it's not already selected).

The page refreshes to show a list of all relationships for the selected partner.

## Add New Partner Relationships

Channel managers can use these steps to add new relationships to the partner:

1. Sign in with your Channel Account Manager credentials.
2. Click **Partners**.
3. Search for and select the partner you want.
4. Click the **Relationships** subtab.
5. In the Show field, select **Relationships** (if it's not already selected).

The page refreshes to show a list of all relationships for the selected partner.

6. Click **Add**.
7. Provide the following information:

The following table shows the field names on the Relationships page and provides a description for each.

Field Name	Description
Type	The type of entity the relationship will be created with, such as Partner, Account, or Contact.
Relationship	The type of relationship between the selected partner and the related object, such as Contact, Distributor, or Re-seller. The relationship values depend on the type of object selected in the Type field. For example, if the Type is Partner, then the valid values are Re-seller and Distributor.
Name	The name of the object you're relating to the partner.
Comments	You can add any information about the relationship that you believe is valuable to preserve.

8. Click **Save**.

# 14 Manage Partner Service Requests

## Manage Partner Service Requests for Channel Managers

If the Service offering has been enabled for your implementation, channel managers can use the service request tools to efficiently resolve any issues that their partners are experiencing. These tools include a Service Request subtab and a Service Request infolet.

The Service Request subtab is available on the Edit Partner pages, and can be configured to appear on other pages, such as Deal Registration and Opportunity pages. Channel managers can view the Service Request infolet on the Partner Overview page.

### Where Do Channel Managers Find These Service Request Tools?

If the Service offering has been enabled, channel managers and their partner users can see the Service Request homepage icon and manage service requests directly from these pages. Channel managers can also see the Service Request subtab on the Partner Overview page, and on the Deal Registration and Opportunity pages if these pages have been configured for Service Requests. Both channel managers and their partners can see the Service Request infolet on the Partner Overview page.

### How Do Channel Managers Use the Service Request Subtab?

Channel managers can use the Service Request subtab to view a list of service requests tied to their accounts and to their partners, so they can efficiently meet the service requirement needs of their partners and their partner's customers. Channel managers can also log and manage service requests on behalf of both their partners and their partner's customers.

### What Information Does the Service Request Infolet Show?

The Service Request infolet on the Partner Overview page shows a count of open service requests associated with the current partner. This count includes service requests for the following instances:

- Service requests that the partner logged for their own needs, such as requests for deal registration support.
- Service requests the partner logged on behalf of their end customers as part of customer support.
- Service requests that the partner logged regarding a deal registration or opportunity on which the partner is working.
- Service requests that a channel manager created on behalf of their partner or their partner's end customers.

## Create a Service Request for a Partner

When channel managers create a service request on behalf of their partners, the partner in context automatically becomes the partner on the service request.

The channel manager can then select the primary contact for the service request from a list of contacts for the partner company.

Channel managers can use these steps to create a service request for their partner.

1. Sign in with your channel manager credentials.
2. From the Partner Management work area on your home page, click **Partners**.
3. From the list of partners on the Partners page, search for and select the partner you want to create a service request for.
4. On the Edit Partner page, click the **Service Request** subtab.
5. On the Service Request page, click **Create Service Request**.
6. Provide information for the fields shown in the following table, including Title, Account, Partner Account, Primary Contact, Severity, Critical, Category, Product, and Description.

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

7. Click **Save and Close**.

# 15 Manage Partner Activities

## Partner Interaction Activities

Activities provide a historical view of the communications or interactions between a partner and the channel organization. Activities can include tasks, appointments, call reports, and call logs.

The activities tracked on the Activity pages give channel users a record of the communications between channel managers and their partners. For example, a channel sales manager might log a meeting with a partner about a lead or opportunity by creating a partner activity. The channel sales manager can later upload attachments to further document the activity.

## View and Manage Partner Activities

Channel managers can create, update, view, and delete partner activities. The Activities pages provide a summary of each activity, which can include tasks, appointments, and call logs.

Channel users can view activities that document an interaction between a partner and a channel user and follow up. Channel users and partner users can view, create, and update these activities. All relevant activities for the partner are visible, including leads and opportunities.

## Create Partner Tasks from a Template

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

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

To create tasks from a task template:

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

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

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

---

The tasks are created from the template.

# 16 Manage Partner Business Plans

## Overview of Managing Partner Business Plans

A business plan is a tool that a brand owner or channel company provides to their partners.

Business plans describe what the partner's business goals are and include specific objectives that the partner can follow to meet the business plan goals.

Channel Managers can define business plans for their partner accounts. Partner business plans provide a means of collaboration between brand owners and their partners in defining strategic goals. Business plans allow both brand owners and partners a way to show their commitment to the partnership, and brand owners can use business plans to show their understanding of their partner's business.

You can add one or more objectives to a partner business plan. These objectives define measurable tactical goals to be achieved by the partner. You can split each objective using one or more of four available dimensions: Time, Product Group, Account, and Geography. By splitting an objective, you can define the targets at a more granular level. For example, you can specify what revenue the partner must reach within the first quarter for a specific product line in a specific geographical region.

## Monitor the Progress of Business Plan Objectives

Channel Account Managers and Channel Sales Managers can use the Analytics tab on the Edit Business Plan page to monitor the progress of a business plan's objectives.

This figure shows example content for the Business Plan Analytics tab, including information about marketing events, training classes, deal registrations, revenue, units sold, and account revenues.



The Analytics tab is automatically available, but you can optionally hide this tab using Application Composer or Page Composer.

Partners do not have access to this tab.

## Create Partner Business Plans and Objectives

Channel managers can create new business plans manually or by copying an existing business plan.

### Manually Create Partner Business Plans and Objectives

Channel managers can use these steps to manually create a partner business plan and add objectives to it.

1. Sign in with your channel manager credentials.
2. From your Partner Management work area, click **Partners**.
3. From your list of partners, search for and select the partner you want to create a business plan for.
4. On the partner **Summary** page, click the **Business Plans** tab.
5. Click **Create Business Plan**.
6. Provide a name for your business plan.
7. From the Period fields, select the appropriate period for your business plan.
8. If the Owner field is not already populated, select the owner of the business plan.
9. From the Status list, select the status for your business plan.



10. Click **Save and Continue**.

An Objectives area appears on the Business Plan page.

11. Click **Create Objective**.
12. Provide a name for the objective.
13. Use the **Period** fields to set the appropriate period for the objective.
14. From the **Type** list, select the type for the objective.
15. Depending on your selection from the Type list you see either **Quantity** or **Amount** for Unit of Measure, which is a read-only field. If the Unit of Measure is Amount, you must select the currency, such as, USD.
16. If you want to set an objective target, you can enter it in the **Target** field.
17. Click **Save and Continue** to open the Objective summary page where you can edit or split the objective, or click **Save and Close** to save the current objective and add another objective to the business plan.

## Create a New Business Plan by Copying an Existing One

Channel managers can use these steps to create a partner business plan by copying an existing business plan.

1. Sign in with your channel manager credentials.
2. From your Partner Management work area, click **Partners**.
3. From your list of partners, search for and select the partner you want to create a business plan for.
4. On the partner **Summary** page, click the **Business Plans** tab.
5. Search for and select the business plan you want to copy to create your new business plan.
6. From the Actions menu on the Edit Business Plans page, select the **Copy** action.
7. In the **New Business Plan Name** field, provide a name for your new business plan.
8. If you want to also copy the objectives to your new business plan, click the **Include Objectives** check box.
9. Save your work.



# 17 Manage Partner Assessments

## Overview of Partner Assessments

Assessments include weighted questions and possible responses that are scored. Channel managers can use partner assessments to evaluate their partners at different stages, including recruitment, engagement, and delivery.

Channel managers select the appropriate assessment template, provide responses for all of the questions in the selected template, and achieve a score. They can use this score to evaluate the health of the assessed partner.

## Assess a Partner

Channel managers can use these steps to assess a partner.

1. Sign in with your channel manager credentials.
2. Click the **Partner Management** work area, and click **Partners**.
3. From your list of partners, select the partner you want to assess.
4. On the Edit Partner page, click the **Assessments** subtab.
5. Click **Add Assessment**.
6. On the Add Assessment dialog box, select the template you want to use for your assessment.
7. In the Response column on the Assessments page, select the appropriate choice for each question.
8. Optionally, you can click the **Comments** icon and provide comments about each question.
9. The assessment score changes based on the response you select for each question. After you select a response for all of the questions, you see the final assessment score.
10. Click **Save** or **Save and Close** to save the assessment.

If your administrator has enabled the Submit button, you can click **Submit** to send the completed assessment. Once you have submitted an assessment, the assessment status changes to Submitted and you can no longer edit the assessment.

If your administrator has enabled the Delete action, you can select **Delete** from the Actions menu to delete the assessment.

