## Contents

<table>
<thead>
<tr>
<th>Preface</th>
<th>i</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1 About This Guide</strong></td>
<td>1</td>
</tr>
<tr>
<td>Audience and Scope</td>
<td>1</td>
</tr>
<tr>
<td>Related Guides</td>
<td>1</td>
</tr>
<tr>
<td><strong>2 Understanding Partner Relationship Management</strong></td>
<td>3</td>
</tr>
<tr>
<td>Understanding Partner Relationship Management and Channel Sales: Overview</td>
<td>3</td>
</tr>
<tr>
<td>Channel Sales Roles: Overview</td>
<td>5</td>
</tr>
<tr>
<td><strong>3 Channel Sales Setup Task Overview</strong></td>
<td>7</td>
</tr>
<tr>
<td>Configuring Channel Sales: Overview</td>
<td>7</td>
</tr>
<tr>
<td><strong>4 Creating Channel Sales Users</strong></td>
<td>11</td>
</tr>
<tr>
<td>Before You Create Channel Sales Users</td>
<td>11</td>
</tr>
<tr>
<td>Creating Channel Sales Users in the UI</td>
<td>17</td>
</tr>
<tr>
<td>Creating Channel Sales Users With File-Based Import</td>
<td>20</td>
</tr>
<tr>
<td><strong>5 Configuring Oracle Sales Cloud for Channel Sales</strong></td>
<td>21</td>
</tr>
<tr>
<td>Setting Up Partner Relationship Management for Channel Sales: Overview</td>
<td>21</td>
</tr>
<tr>
<td>Configuring Pages for Partners</td>
<td>22</td>
</tr>
<tr>
<td>Configuring Deal Registrations</td>
<td>30</td>
</tr>
<tr>
<td><strong>6 Creating Partners</strong></td>
<td>37</td>
</tr>
<tr>
<td>Creating Partner Accounts and Partner Contacts for Channel Sales: Explained</td>
<td>37</td>
</tr>
<tr>
<td>Importing Partner Accounts and Partner Contacts for Channel Sales: Explained</td>
<td>42</td>
</tr>
<tr>
<td><strong>7 Configuring Data Migration for Channel Sales</strong></td>
<td>51</td>
</tr>
<tr>
<td>Channel Sales Data Migration: Overview</td>
<td>51</td>
</tr>
<tr>
<td>Importing Deal Registrations for Channel Sales: Explained</td>
<td>51</td>
</tr>
</tbody>
</table>
## Setting Up Sales Territories and Assignment for Channel Sales

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Territories, Assignment, and Channel Sales: Overview</td>
<td>55</td>
</tr>
<tr>
<td>Configuring Channel Sales Territory Assignment for Partner Accounts: Procedure</td>
<td>60</td>
</tr>
<tr>
<td>Assigning Channel Sales Manager Territories to Leads: Explained</td>
<td>62</td>
</tr>
<tr>
<td>Assigning Channel Sales Manager Territories to Opportunities: Explained</td>
<td>65</td>
</tr>
<tr>
<td>Assigning Channel Sales Manager Territories to Deal Registrations: Explained</td>
<td>66</td>
</tr>
</tbody>
</table>

## Configuring Business Intelligence for Channel Sales

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Intelligence for Oracle Partner Relationship Management: Overview</td>
<td>69</td>
</tr>
<tr>
<td>Managing Access to Business Intelligence: Explained</td>
<td>70</td>
</tr>
<tr>
<td>Displaying Partner Data in Reports: Explained</td>
<td>72</td>
</tr>
<tr>
<td>Enabling Partner Access to BI Content: Explained</td>
<td>73</td>
</tr>
<tr>
<td>Adding Analytics to Oracle Sales Cloud Pages</td>
<td>76</td>
</tr>
</tbody>
</table>

## Expanding Your Channel Sales Capabilities

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creating Custom Workflows for Channel Sales</td>
<td>87</td>
</tr>
<tr>
<td>Configuring Partner Programs</td>
<td>91</td>
</tr>
<tr>
<td>Configuring Partner Program Enrollments</td>
<td>94</td>
</tr>
<tr>
<td>Configuring Partner Business Plans and Objectives</td>
<td>95</td>
</tr>
<tr>
<td>Configuring Marketing Development Funds (MDF)</td>
<td>98</td>
</tr>
<tr>
<td>Configuring Oracle Social Network for Channel Sales</td>
<td>104</td>
</tr>
<tr>
<td>Enabling Oracle Social Network for Partner Collaboration: Explained</td>
<td>104</td>
</tr>
</tbody>
</table>

## Additional Learning Resources

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Additional Resources</td>
<td>105</td>
</tr>
</tbody>
</table>

## Glossary

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>107</td>
</tr>
</tbody>
</table>
Preface

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

Oracle Applications Help

Use the help icon (?) to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon (?) in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community**: Use [Oracle Applications Customer Connect](https://appconnect.oracle.com) to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the [Oracle Help Center](https://fusionhelp.oracle.com) to find guides and videos.

- **Training**: Take courses on Oracle Cloud from [Oracle University](https://education.oracle.com).

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the [Oracle Accessibility Program](https://www.oracle.com/accessibility).

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide provides implementation users and channel sales users with the concepts and procedures necessary to configure Oracle Sales Cloud for channel sales. Since the assumption made in this guide is that you are building a channel sales branch for your existing direct sales organization, the Oracle Sales Cloud Getting Started with Your Implementation guide is a prerequisite. This guide leverages the default settings provided by Oracle and does not provide detailed explanations of all available features. All setup steps described in this guide pertain to features and functionality available to channel sales users and partners in the simplified user interface.

Related Guides

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Getting Started with Your Implementation</td>
<td>Describes how to set up sales automation capabilities in Oracle Sales Cloud using a case study to describe concepts and procedures.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Describes the tasks that you perform to configure and set up Sales.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Describes how to import legacy and other data into Oracle Sales Cloud using File-Based Data Import.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Describes how to create and customize Sales Cloud analytics and reports.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Customizing Sales</td>
<td>Describes how to use tools to customize and extend the Oracle Sales Cloud.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2  Understanding Partner Relationship Management

Understanding Partner Relationship Management and Channel Sales: Overview

Oracle Sales Cloud (OSC) partner relationship management functionality allows companies to utilize indirect or channel sales, where salespeople working for your partner sell your company’s products or services.

What is the Difference Between Direct and Channel Sales?

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

The best way to understand channel sales is to think of it as a branch of your company structure that extends between your internal sales team and teams of partner sales representatives who are external to your company.

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

What Needs to be Done?

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

- Partner Accounts and Partner Contacts
- Customer Accounts and Contacts
- Partner Announcements
- Partner Activities
- Partner Programs
- Partner Program Enrollments
- Partner Business Plans and Objectives
- Leads
- Opportunities
- Deal Registrations
How you configure your Oracle Sales Cloud business objects depends on how you plan to utilize them for channel sales. Beyond setting up the business objects, you must also configure other Oracle Sales Cloud functionality for channel sales, such as sales territories and assignment so that your leads and opportunities go to the most appropriate partners.

How to Use This Guide

Here’s how to use this guide:

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

Prerequisites

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

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

Supported Business Use Cases

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

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

What's in Each Chapter?

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

<table>
<thead>
<tr>
<th>Chapter Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>About this Guide</td>
<td>Discusses starting point assumptions, the supported use cases, and a description of each chapter.</td>
</tr>
<tr>
<td>Understanding Partner Relationship Management Channel Sales</td>
<td>Describes channel sales and the user roles involved.</td>
</tr>
<tr>
<td>Channel Sales Setup Task Overview</td>
<td>Lists the high-level configuration tasks in order.</td>
</tr>
<tr>
<td>Creating Channel Sales Users</td>
<td>Discusses the ways to create channel sales users and provides steps for each creation method.</td>
</tr>
</tbody>
</table>
| Configuring Oracle Sales Cloud for Channel Sales | Describes the business objects that need to be configured to handle channel sales, including:  
  • Partner Accounts and Partner Contacts  
  • Leads  
  • Opportunities  
  • Deal Registrations |
| Configuring Data Migration for Channel Sales | Discusses the import of partner relationship management objects and provides a worked example for Partner Accounts and Partner Contacts. |
| Setting Up Sales Territories and Assignment for Channel Sales | Discusses how to configure partner territories and territory assignment for channel sales. |
| Configuring Business Intelligence for Channel Sales | Describes how to configure audit reporting and how to expose the Reports tab on Channel Sales pages. |
| Expanding Your Channel Sales Capabilities | Provides steps to configure additional business objects for channel sales use. |
| Additional Learning Resources | Provides a list of locations to find additional documentation, tutorials, support articles, and other resources. |
Channel Sales Roles: Overview

Channel sales involves a channel organization working to recruit channel partners and sell the channel organization’s products and services through these partners to grow their business. Both channel organizations and their partners use Oracle Sales Cloud partner relationship management functionality to align their business practices so that they can more successfully close deals. Channel organizations can also use Oracle Sales Cloud partner relationship management functionality to analyze partner performance, thus optimizing their time and financial investments in their partners.

Channel Sales Job Roles

Job roles provide users with access to different functions and data so they can accomplish their jobs. Channel sales utilizes several distinct job roles to accomplish these goals. The following table lists the general responsibilities of each channel sales job role.

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

Configuring Channel Sales: Overview

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

To configure Oracle Sales Cloud for channel sales, perform the following tasks:

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Step Description</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1.</td>
<td>Sign in with your sales administrator credentials and create the following channel sales users:</td>
<td>Creating channel sales users in the UI:</td>
</tr>
<tr>
<td></td>
<td>• Channel Operations Manager</td>
<td>• Manage Users</td>
</tr>
<tr>
<td></td>
<td>• Channel Sales Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Channel Account Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td>These users are part of your company. Since you already implemented Oracle Sales Cloud for direct sales, you don’t need to create the root resource organization for your sales organization hierarchy. You only need to assign these users with the resource roles provided by Oracle.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If you have custom resource roles, you can use the Manage Role Provisioning Rules task to create role provisioning rules that assign these roles to your channel sales users.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The best method to create channel sales users is to manually create a few users at the top of your channel sales hierarchy in the UI to test your setups and to make sure the provisioning rules work as you intend them to. You can then import the rest of the channel sales organization hierarchy by using the template provided by Oracle.</td>
<td></td>
</tr>
<tr>
<td>Step 2.</td>
<td>Configure the functional areas you want to use for channel sales, including:</td>
<td>Manage Partner Account Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Partner Accounts and Partner Contacts (partner sales representatives)</td>
<td>Manage Partner Contact Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Partner Programs</td>
<td>Manage Partner Program Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Partner Program Enrollments</td>
<td>Manage Partner Program Enrollment Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Leads</td>
<td>Manage Lead Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Opportunities</td>
<td>Manage Opportunity Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Deal Registrations</td>
<td></td>
</tr>
</tbody>
</table>
### Channel Sales Setup Task Overview

<table>
<thead>
<tr>
<th>Step Number</th>
<th>Step Description</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Step 3.</strong> Configure the Partner Portal and Sales Infolet page.</td>
<td>Manage Oracle Social Network Objects</td>
</tr>
<tr>
<td></td>
<td><strong>Step 4.</strong> Configure Oracle Social Network for channel sales.</td>
<td>Manage Oracle Social Network Objects</td>
</tr>
<tr>
<td></td>
<td><strong>Step 5.</strong> Migrate your data to Oracle Sales Cloud. Create or import your partner accounts and partner contacts (partner sales representatives) and build your teams of partner contacts.</td>
<td>Import Partner Users</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Define Sales Partners</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Configure Partner Profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Define Partner Tasks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manage Administrator Profile Values</td>
</tr>
<tr>
<td></td>
<td><strong>Step 6.</strong> Configure sales territories and territory assignment for channel sales.</td>
<td>Manage Sales Leads and Deal Registration:</td>
</tr>
</tbody>
</table>

**Step 3.** Configure the Partner Portal and Sales Infolet page.

**Step 4.** Configure Oracle Social Network for channel sales.

**Step 5.** Migrate your data to Oracle Sales Cloud. Create or import your partner accounts and partner contacts (partner sales representatives) and build your teams of partner contacts.

**Step 6.** Configure sales territories and territory assignment for channel sales.
<table>
<thead>
<tr>
<th>Step Number</th>
<th>Step Description</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Opportunities and Partner Accounts:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Manage Sales Assignment Manager Objects</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Manage Sales Assignment Manager Rules</td>
<td></td>
</tr>
<tr>
<td>Step 8.</td>
<td>Configure business intelligence for channel sales.</td>
<td></td>
</tr>
</tbody>
</table>
4 Creating Channel Sales Users

Before You Create Channel Sales Users

What You Must Do Before Creating Channel Sales Users: Explained

When you create sales application users either in the UI or by importing them from a file, you not only provision the permissions the users need to do their jobs, but you also build the organization chart for your sales organization. This means that you must set up not only the provisioning rules, but also the elements that the Oracle Sales Cloud uses to create the organization chart in the Resource Directory.

Each channel sales user must have:

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

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

Oracle Sales Cloud builds the resource organization hierarchy based on the management hierarchy you specify when you create your channel sales users. You must enter a manager for each user you create.

What Oracle Provides for You

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

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

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

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

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

The following table lists the channel sales role-provisioning rules provided by Oracle, the condition which triggers the provisioning, and the job and abstract roles the rule provisions. You can obtain a description of each job and abstract role from the Oracle Sales Cloud Security Reference guide.
Note: If you are setting up Oracle Sales Cloud in a Global Single Instance (GSI) environment, then Oracle does not provide these role-provisioning rules for you. You must create them manually.

<table>
<thead>
<tr>
<th>Provisioning Rule Name</th>
<th>Condition</th>
<th>Job or Abstract Roles Provisioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Operations Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Operations Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Operations Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Channel Sales Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Sales Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Channel Account Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Account Manager</td>
<td>Resource</td>
</tr>
</tbody>
</table>

Creating Channel Sales Users Setup Overview

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

You create channel sales users in the Create User page, which you open from the Manage Users work area. You can navigate to the work area by clicking the Manage Users task in the Create Sales Users folder in the implementation project.
Since channel sales is a branch of your existing direct sales organization, the channel sales branch must be tied to the organizational hierarchy of your direct sales team. The following image shows how a channel sales branch fits with the direct sales hierarchy of Vision Corp.

What You Must Do Before Importing Channel Sales Users: Explained

After you create several channel sales users in the UI to test your setup, you are ready to import the rest of the users from a text file. The import creates the resource organizations for each manager, creates the channel sales organization hierarchy, and provisions the channel sales users with the job roles and abstract roles they need. To speed up your import, you can download a template provided by Oracle.

You can open the different import tasks directly from the Create Sales Users folder in the implementation project or by searching for the tasks by name from the Setup and Maintenance work area.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Download the template from the Employee Resource Seeded Mapping - Comprehensive mapping. To display the mapping, search for the seeded mappings for the Employee Resource object.</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>2</td>
<td>Replace the sample data in the template with your data, preserving the order of the columns. You must obtain some of the values for your import from the application itself. For example, you must include the names of the business unit and the legal entity as it appears in the application and you must include the codes for the resource roles you are using.</td>
<td>This is a task you perform in your import file.</td>
</tr>
<tr>
<td>3</td>
<td>Append to the last column in your import file any additional attributes you want to import. For example, to control which user records send you the e-mails with user credentials, append a column with the heading <code>WorkerProfile_SendCredentialsEmail</code>. By importing a value of Y or N for each user, you can specify which user records generate the e-mail. Make sure that you obtain the sign-in information for a representative sample of users, so that you can use those users for testing. For example, to test opportunity assignment and forecasting, you’ll want to sign in as a salesperson and manager in each regional sales organization. To test forecasting and quotas, you must be able to sign in as the sales administrator. If you are importing the users, then you can indicate in your import file if you want to receive the credentials e-mails.</td>
<td>This is a task you perform in your import file.</td>
</tr>
<tr>
<td>4</td>
<td>If you added any additional columns to the original template, you must create a new mapping for your import. To do this, you copy the predefined mapping and add the additional import column to the copy.</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>5</td>
<td>Import the file using the mapping you copied and modified.</td>
<td>Manage File Import Activities</td>
</tr>
<tr>
<td>6</td>
<td>Enable searching of the imported users.</td>
<td>Manage HCM Configuration for Coexistence</td>
</tr>
</tbody>
</table>
Step | Description | Task Name
--- | --- | ---
7 | Sign in as one of the sales users you created, and review the resource organization by navigating to the Resource Directory. The directory displays a graphical representation of the resource hierarchy. You can correct any minor errors that you find and upload user photos by signing in as a setup user again. You search for and edit the user records in the Manage Users work area. | This task is not available in the implementation project. Instead, select Resource Directory in the Navigator.

Understanding the Employee Resource Import Template

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

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

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

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

<table>
<thead>
<tr>
<th>Template Header Column Name</th>
<th>Value to Import</th>
</tr>
</thead>
<tbody>
<tr>
<td>WorkerProfile_BusinessUnit</td>
<td>Enter the name of the business unit created for you when you signed up for the service. You can obtain this value from the Business Unit field in the Employee Information region of Create User page, as described in this topic.</td>
</tr>
<tr>
<td>WorkerProfile_LegalEntity</td>
<td>Enter the legal entity created for you. You can obtain this value from the Legal Employer field in the Employee Information region of Create User page, as described in this topic.</td>
</tr>
<tr>
<td>WorkerProfile_FirstName</td>
<td>Enter the first name as you want it to appear in the sales application.</td>
</tr>
<tr>
<td>WorkerProfile_LastName</td>
<td>Enter the last name as you want it to appear in the sales application.</td>
</tr>
</tbody>
</table>
| WorkerProfile_EmailAddress | You must enter a unique e-mail address. The application sends the initial sign-in credentials to this address unless you:  
  - Redirect the e-mail to an alternate user  
  - Delay the sending of the e-mail.  
  These options are described in related topics. |
| WorkerProfile_ManagerEmail | Enter the manager’s e-mail address. The application uses this address to build the management hierarchy. |
Adding Channel Sales to Vision Corp.

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

- Beth Howard - VP Global Channel Sales
- Daniel Grayson - VP US Channel Sales
Oracle Sales Cloud
Getting Started with Oracle Partner Relationship Management

Chapter 4
Creating Channel Sales Users

- Terry Smith - Channel Sales Manager
- Bill Cross - Channel Operations Manager
- Colby Morris - Channel Account Manager
- Bonnie Vickers - Channel Account Manager
- Ellis Gibson - Channel Account Manager

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

<table>
<thead>
<tr>
<th>WorkerProfile_FirstName</th>
<th>WorkerProfile_LastName</th>
<th>ResourceOrganizationMembership_OrganizationName</th>
<th>ResourceOrganizationMembership_ParentOrganizationName</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beth</td>
<td>Howard</td>
<td>Global Channel Sales</td>
<td>Global High Tech</td>
</tr>
<tr>
<td>Daniel</td>
<td>Grayson</td>
<td>US Channel Sales</td>
<td>Global Channel Sales</td>
</tr>
<tr>
<td>Bill</td>
<td>Cross</td>
<td>US Channel Sales</td>
<td>US Channel Sales</td>
</tr>
<tr>
<td>Terry</td>
<td>Smith</td>
<td>US Channel Sales</td>
<td>US Channel Sales</td>
</tr>
<tr>
<td>Colby</td>
<td>Morris</td>
<td>US Channel Sales - East</td>
<td>US Channel Sales</td>
</tr>
<tr>
<td>Bonnie</td>
<td>Vickers</td>
<td>US Channel Sales - Central</td>
<td>US Channel Sales</td>
</tr>
<tr>
<td>Ellis</td>
<td>Gibson</td>
<td>US Channel Sales - West</td>
<td>US Channel Sales</td>
</tr>
</tbody>
</table>

Obtaining the Names of the Business Unit and Legal Entity

1. Sign in as a setup user.
2. Open the task Manage Users from the implementation project or search for the task by name in the Setup and Maintenance work area.
3. Click Create.
   - The Create User page appears.
4. In the Employment Information region, select Employee as the Person Type.
5. You can obtain the business unit and legal entity values for your file from the Business Unit and Legal Entity lists.
6. Click Cancel.

Obtaining the Resource Role Codes

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

Creating Channel Sales Users in the UI: Procedure

To support the business use cases mentioned previously, we must create a channel sales branch of the Vision Corp. sales organization as depicted in the Sales Cloud Getting Started with Your Implementation guide. In this guide Peter Apt is the vice president of Global High Tech sales for Vision Corp., so the top tier of our channel sales branch reports to him.

This topic shows you how to create the following users as resources for the channel sales branch of Vision Corp.:

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

Creating Channel Sales Users in the UI

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

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

2. On the Manage Users page, click Create.

   The Create User page appears.

3. Enter the user’s name and a unique e-mail address in the Personal Details region.

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

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

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

5. In the User Details region, enter the user name.
If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name.

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

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

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

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

   ➡ **Note:** The remaining fields in the Employment Information region are not used by Oracle Sales Cloud. These fields include: Job, Grade, Department, Location, Mail Stop, and Manager.

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

   If you did not already create the resource organization, then:
      i. Click **Create** link at the end of the **Organization** list.
         
         The Create Organization window appears.
      ii. Enter the organization name.
      iii. Make sure the **Sales** option is selected and click **OK**.
   d. If the user you are creating is a not a manager then the resource organization is automatically copied from the manager.

9. Click **Autoprovision Roles**.

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

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

## Creating Channel Sales Users With File-Based Import

### Importing Channel Sales Users: Procedure

If you have a large number of channel sales users, then it is much faster to use file-based data import to create them instead of creating them individually in the UI.

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

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

   The Manage Import Activities page appears.

3. Click **Create**.

   The Create Import Activity: Enter Import Options page appears.

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

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

13. Click **Next**.

   The Create Import Activity: Schedule page appears.

14. Click **Next**.

   The Create Import Activity: Review and Activate page appears.

15. Click **Activate**.

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

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

   An import activity with a status of **Completed** or **Completed with Errors** indicates that the import activity completed. To obtain error details, click the import status to see the logs.
5 Configuring Oracle Sales Cloud for Channel Sales

Setting Up Partner Relationship Management for Channel Sales: Overview

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

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

The following table describes the high-level tasks to set up partner channel sales capabilities. Refer to the related topics for more information.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Where Performed</th>
<th>Related Topics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customize UI labels</td>
<td>Customize field display labels for partner users.</td>
<td>Application Composer</td>
<td>• Customizing Pages for Channel Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Leads</td>
</tr>
<tr>
<td>Customize page layout for fields tied to specific roles</td>
<td>Use dynamic layout by role when you have fields that always need to be exposed for a role, and these fields aren't linked by validation logic.</td>
<td>Application Composer</td>
<td>• Customizing Pages for Channel Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Leads</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Opportunities</td>
</tr>
<tr>
<td>Customize page layout for standard fields with validation logic</td>
<td>Use when you want to display hidden, standard fields that have linked logical dependencies.</td>
<td>Page Composer</td>
<td>• Customizing Pages for Channel Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Leads</td>
</tr>
<tr>
<td>Customize landing page for a role</td>
<td>Customize the list (landing) page layout for an object by adding fields or columns you want to expose for a specific partner role.</td>
<td>Application Composer</td>
<td>• Customizing Pages for Channel Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Leads</td>
</tr>
<tr>
<td>Turn off the new fields you added in Application Composer for every role that does not need them</td>
<td>Application Composer does not support editing object list (landing page) tables by role, so you must disable any new fields you added in Application Composer for every role that does not need them.</td>
<td>Page Composer</td>
<td>• Customizing Pages for Channel Sales</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Setting Up Partner Channel Sales in Leads</td>
</tr>
</tbody>
</table>
### Configuring Oracle Sales Cloud for Channel Sales

**Customizing Additional Partner Relationship Management Objects for Channel Sales**

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

- deal registrations
- partner registrations
- partner program enrollments
- MDF

**Configuring Pages for Partners**

**Customizing Pages for Channel Sales**

Setting up channel sales functionality in Oracle Sales Cloud involves customizing the user interface. By default, Oracle Sales Cloud partner relationship management UIs are configured for the partner roles, however you must customize these UI pages for the channel roles. For example, a common customization is adding a Partner column to an object’s landing page so that the channel account manager knows which partner the record belongs to.

This topic provides some examples of what you may want to customize. Your unique business requirements, of course, will dictate what you actually customize for partner pages.
Creating a Sandbox
Before you can customize standard objects, you must create a sandbox. Use these steps to create your sandbox.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. Click the Settings and Actions menu icon to the right of your name in the upper right-hand corner of the page.
3. From the Settings and Actions list, click Manage Sandboxes.
4. Click the New icon (+) or from the Actions menu, select New.
5. In the Sandbox Name field, type a name for your sandbox.
6. Click Save and Close.

You should see your sandbox displayed in the list of available sandboxes.
7. Select your sandbox from the list and click Set as Active.

Customize Pages
You can add or hide fields or field groups (regions) in the Partner pages. The customization tool you use depends on what you are trying to accomplish.

The following table lists some scenarios, which customization tool to use, and examples.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Customization Tool</th>
<th>Example</th>
</tr>
</thead>
</table>
| You have fields or field groups on a create page or edit (details) page that always need to be exposed for a specific role. You can create Dynamic Layouts to accomplish this. | Application Composer | • On the Edit Lead page, the Channel Manager field needs to be exposed for users with partner roles only.  
|                                                                            |                      | • On the Create Lead page, the Partner field needs to be exposed for channel users only. |
| You want to expose one or more Partner Information region fields for specific roles when Sales Channel is set to Partner on a lead. | Page Composer        | • In the Create Lead page, you want to expose the Partner and Sales Channel fields, but you want Partner to appear only when the Sales Channel is set to Partner.  
|                                                                            |                      | • In the Edit Lead page, you want to expose Sales Channel field and the Partner Information field group. However, the Partner Information field group should only appear when Sales Channel is set to Partner. |
|                                                                            |                      | Instead of using Page Composer, you can also accomplish the scenarios above by using dynamic page layouts in Application Composer. See Dynamic Page Layouts: Explained. |
| You want to rename fields.                                                | Application Composer | Change Primary Partner to Partner in the Leads pages.                 |

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

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

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

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

Customize the Landing Page

You can customize the partner landing page table fields and columns for specific partner roles. The customization tool you use depends on whether or not the fields are already preconfigured for the landing page table.

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

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Customization Tool</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expose any hidden fields or columns that are available for selection in Page Composer in Page Composer</td>
<td>Add the Partner column to the Leads list page for channel user roles only.</td>
<td></td>
</tr>
</tbody>
</table>
### Scenario

<table>
<thead>
<tr>
<th>Customization Tool</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>the landing page lists (summary table) for a specific role.</td>
<td></td>
</tr>
</tbody>
</table>

Begin the process of adding any hidden fields or columns you want to expose in the landing page lists for specific roles, if the fields are not available for selection in Page Composer.

**Application Composer**

- Expose the Source and Accepted Date columns in the Leads list table in the Leads landing page. You must first add them to the Leads list table and then use Page Composer to add them as fields to the table.
- Add the Partner column to the Opportunities list table in the Opportunities landing page. You must first add them to the Opportunities list table and then use Page Composer to add them as fields to the table.

Complete the process of adding any hidden fields or columns you want to expose in the landing page lists for specific roles, if the fields are not available for selection in Page Composer.

**Page Composer**

- You have exposed the Source and Accepted Date columns in the Sales Lead table, but you do not want them exposed for any users except regular partner end users.
- You must customize the landing page table layout in Page Composer for every job role that you do not want to expose the Source and Accepted Date columns. In other words, for all nonpartner roles, deselect these two columns on the Leads landing page table. (Note that deselecting these fields at the Site layer in Page Composer will make them unavailable at the Job Role layer, even if you have added them in Application Composer.)

For more information, see the topics, Setting Up Partner Channel Sales in Leads and Setting Up Partner Channel Sales in Opportunities.

### Create Saved Searches for Specific Roles

You can create custom saved searches (also called saved lists) for specific partner roles. For example, you can create a saved search for all users with the Partner Sales Representative role using criteria that these users would typically need, and another one for users with the Channel Sales Manager role using the criteria that they would typically need. You use Page Composer to create the custom saved searches.

For more information, see the topics, Setting Up Partner Channel Sales in Leads and Setting Up Partner Channel Sales in Opportunities.

### Setting Up Partner Channel Sales in Leads

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

- Customizing page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
• Renaming fields
• Creating assessment templates used to qualify leads
• Validating default assignment type used
• Defining assignment rules if you select rule-based mode.

The exact tasks depend upon your unique business requirements.

Note: Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.

Customizing Page Layout for Leads
Following is a sample procedure for creating custom layouts for the Leads pages for different user types.

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

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

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

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

   a. Click the Standard tab.
   b. For each field to be renamed, select the row, and click Edit the Selected Field.
   c. Under Appearance, edit the display labels. Following is a sample of the fields you may want to customize.

<table>
<thead>
<tr>
<th>Default Field Name</th>
<th>Custom Display Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerLevelMeaning</td>
<td>Partner Level</td>
</tr>
<tr>
<td>PartnerOwnerName</td>
<td>Channel Manager</td>
</tr>
<tr>
<td>Primary Partner</td>
<td>Partner</td>
</tr>
</tbody>
</table>

d. Save your changes.

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

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

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

For the channel account manager and channel sales manager:

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

For partners:

- Add the Source and Accepted Date columns.

Creating Custom Saved Searches
You may want to create custom saved searches for partner users. This section presents some example customizations you would make the both channel and partner salesperson roles.

To find opportunities for Channel Account Manager: "Opportunities where I am on the team" should be default.
To find leads for the Channel Account Manager, expose the following fields in the search:

- Pending Distribution
- Pending Acceptance
- Accepted Partner Leads

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

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

**Additional Setup Steps**

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

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

**Setting Up Channel Sales in Opportunities**

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

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

The exact tasks depend upon your unique business requirements.

**Note:** Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.

### Customizing Page Layout for Partner Users

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

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

### Customizing Page Layout for Channel Account Managers

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

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

10. Test your changes by signing in as a user with one of the roles you associated with the layout.

11. Publish the sandbox.

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

### Additional Setup Steps

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

<table>
<thead>
<tr>
<th>Setup Step</th>
<th>Details</th>
</tr>
</thead>
</table>
| Create and activate assessment templates | Task Name: Manage Opportunity Assessment Templates  
See the assessment topics for more information. |
| Configure partner team resource access level and function | Task Name: Manage Opportunity Profile Options  
Verify the values for the following profile options:  
- Partner Resource Sales Team Access Level Default (MOO_DEFAULT_PARTNER_ACCESS_LEVEL): Default access level for partner resources added to the opportunity team. The default is No Access.  
- Partner Resource Sales Team Function Default (MOO_DEFAULT_PARTNER_TEAM_MEMBER_FUNCTION): Default function for partner resources added to the opportunity sales team. The default value is Integrator.  
Ensure that automated opportunity assignment for partners is set up. If using territory-based assignment, you must set up Channel Sales Manager territories. See the territories topics for more information on territories setup. |

### Configuring Deal Registrations

#### Deal Registrations: Overview

Deal registration is the process partners use to request exclusive rights to a deal from their brand owner or channel organization. This process provides partners with the means to inform the brand owner or 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 simplified Deal Registration pages to more easily manage their deal registrations and partners can register deals using their self-service partner portal.

Partners can register deals using the partner portal. By default, submitted deals 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.

This topic covers the following:

- How Does Deal Registration Work?
- What are the Benefits of Deal Registration?
- Who Does What With Deal Registrations?

How Does Deal Registration Work?

Once a partner identifies a lead, the partner registers it online using simplified Deal Registration pages. 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 opportunity 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 brand owner’s own sales team, are not allowed to negotiate a similar deal with that lead. If the time period expires before the partner can close the sale, the channel team can the deal to another partner or to its internal sales team. Typically this is done for extenuating circumstances, such as when the lead requests another partner.

What Are the Benefits of Deal Registration?

Deal registration lowers the chance of channel conflict -- a situation in which channel partners compete against one another, or compete against the brand owner’s or 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 brand owner taking the lead once the partner has brought them into the discussion. Even with deal registration in place,, however, a brand owner or channel organization may occasionally give a lead to another partner or to its internal sales team. Typically this is done for extenuating circumstances, such as when the lead requests another partner.

What Are the Roles and Associated Actions With Deal Registrations?

The following table shows the roles and the deal registration actions allowed.

<table>
<thead>
<tr>
<th>Roles</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Sales Representative, Partner Sales Manager, and Partner Administrator</td>
<td>Create a deal registration and submit it for approval.</td>
</tr>
<tr>
<td>Partner Sales Representative, Partner Sales Manager, and Partner Administrator</td>
<td>Withdraw a deal registration in pending approval status.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit a deal registration if they are 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 cannot be changed by the partner user. However, a channel account manager or channel sales manager can pick or change the partner company when they are creating or editing a deal registration.</td>
</tr>
</tbody>
</table>
### Roles and Actions

<table>
<thead>
<tr>
<th>Roles</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>View deal registration product details if they are a resource on the deal team and they have view, edit, or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit, add, or remove deal registration product details if they are a resource on the deal team with edit or full access, and the deal registration is in Draft, Returned or Withdrawn status.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>View deal registration team details if they are a resource on the deal team and they have view, edit, or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit deal registration team members if they are a resource on the deal team with edit or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit, add, or remove deal registration team members if they are a resource on the deal team and they have full access. Partner users can only add resources that belong to their own partner company.</td>
</tr>
<tr>
<td>Partner Administrator</td>
<td>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.</td>
</tr>
<tr>
<td>Partner Sales Representative, Partner Sales Manager and Partner administrators</td>
<td>Add or modify notes, activities and add team members to the deal team regardless of the status the deal registration is in.</td>
</tr>
<tr>
<td>Channel Sales Manager and Channel Account Manager</td>
<td>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 are a designated approver for the deal registration. They can do a duplicate check on the deal registration, they can convert a deal registration to an opportunity, and they can access the social tab.</td>
</tr>
<tr>
<td>Sales Administrator and Channel Operations Manager</td>
<td>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 are not on the sales team or territory.</td>
</tr>
</tbody>
</table>

### Setting Up Deal Registration: Explained

To configure Deal Registrations for use with Oracle Sales Cloud partner relationship management, you must perform several configuration procedures. Some of these procedures may include:

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

The exact tasks depend upon your unique business requirements.

**Note:** Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.
Customizing Page Layout for Deal Registrations

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

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

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

1. Make a copy of the appropriate layouts you created or modified above and:
   - Remove PartnerOwnerName in the Summary region.
   - In the Sales Team subtab, add the Organization field to the Summary Table and move it directly below Team Member.
2. Make sure the new layout is above the Standard Layout in the table but below the partner user layout.
Renaming Field Labels
You can rename field names from their default values to new values, as needed.

   a. Click the Standard tab.
   b. For each field to be renamed, select the row, and click Edit the Selected Field.
   c. Under Appearance, edit the display labels. Following is a sample of the fields you may want to customize.

<table>
<thead>
<tr>
<th>Default Field Name</th>
<th>Custom Display Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerLevelMeaning</td>
<td>Partner Level</td>
</tr>
<tr>
<td>PartnerOwnerName</td>
<td>Channel Manager</td>
</tr>
<tr>
<td>Primary Partner</td>
<td>Partner</td>
</tr>
</tbody>
</table>

   d. Save your changes.

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

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

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

Oracle Sales Cloud has preconfigured workflows for deal registration; however, to optimize deal registration for a channel sales environment, you should customize the relevant fields and pages for the applicable roles using Application Composer and Page Composer.

As well, simplified activity management pages are optimized for direct sales. You should customize the activities pages to expose deal registration attributes for indirect sales which have deal registration programs.

_tip: Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.
Understanding the Preconfigured Deal Registration Flow

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

1. Assignment adds team members and potential approvers to the deal team.
   
   By default, Oracle Sales Cloud does not include assignment rules for deal registration.

2. If no approver is identified or if the approver can't be identified on the team, the deal registration is routed to the default approver. The default approver is also identified by the profile option MKL_DEFAULT_DEAL_REGISTRATION_APPROVER.

3. The deal object is retrieved and sent to the human task.

4. The human task uses rules to determine approvers for the deal and then sends notifications.

5. The approvers then either approve, reject, or return the deal.

6. When a deal is approved, the deal is converted to an opportunity based on the copy map profile option MKL_DEAL_TO_OPTY_MAPPING_NAME.

Setting Up the Preconfigured Deal Registration Workflow

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

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

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

<table>
<thead>
<tr>
<th>Profile Option Name and Code</th>
<th>Description</th>
<th>Preconfigured Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>This profile option determines if the default assignment mode is rule-based, territory-based, or both.</td>
<td>Rules-based Assignment Only/ORA_RBA</td>
</tr>
<tr>
<td>MKL_DEFAULT_ASGN_MODE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Sales Team Access Level Default for Deal Registration</td>
<td>This profile option determines the default access level that is granted to a resource who is added to the deal registration team. This can be changed later by people who have Full Access to the deal.</td>
<td>200</td>
</tr>
<tr>
<td>MKL_DEFAULT_SALES_TEAM_ACCESS_LEVEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Deal Assignment</td>
<td>This is the profile option you use with rule-based deal assignment.</td>
<td>NULL</td>
</tr>
<tr>
<td>MKL_RBA_RULESETGROUP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deal Registration Query Default Number of Days</td>
<td>This profile option determines the start and end dates for the Last Update Date search fields in Deal Registration Search UI.</td>
<td>90</td>
</tr>
<tr>
<td>MKL_SEARCH_LAST_UPDATED_RANGE_DEFAULT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Deal Assignment</td>
<td>This is the profile option you use with territory-based deal assignment.</td>
<td>NULL</td>
</tr>
<tr>
<td>MKL_TBA_RULESETGROUP</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Setting Up an Optimized Deal Registration Workflow

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

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

Creating Partner Accounts and Partner Contacts for Channel Sales: Explained

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

There are two ways to create partner accounts and partner contacts in Oracle Sales Cloud:

- You can create them manually in the UI.
- You can import them using file-based data import.
Your channel sales team consists of internal employees and your partner accounts and partner contacts are all external to your company. To support our business use cases, we need to create three partner accounts. The following image shows how the three partner accounts exist outside the organizational hierarchy of Vision Corp.

Creating the Active Systems Partner Account in the UI

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

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

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

4. Provide the following information for the partner:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>What to Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type &quot;Active Systems&quot;.</td>
</tr>
<tr>
<td>Type</td>
<td>Select &quot;Systems Integrator&quot;.</td>
</tr>
<tr>
<td>Tier</td>
<td>Select &quot;Gold&quot;.</td>
</tr>
<tr>
<td>Status</td>
<td>Select &quot;Active&quot;.</td>
</tr>
<tr>
<td>Country</td>
<td>Select &quot;United States&quot;.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Type &quot;431 Folsom St.&quot;.</td>
</tr>
<tr>
<td>City</td>
<td>Type &quot;San Francisco&quot;.</td>
</tr>
<tr>
<td>State</td>
<td>Type &quot;CA&quot;.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Type &quot;94105&quot;.</td>
</tr>
</tbody>
</table>

5. You can create the primary contact for this partner account at the same time we create the account. The primary contact is the person assigned to the business object team when that business object is assigned to the Active Systems partner account. Oracle Sales Cloud automatically assigns the Partner Administrator role to the primary contact and a partner account must have a primary contact assigned before you can activate the partner account. To create the primary contact for Active Systems, click the Create Primary Contact check box.

6. Provide the following information for the primary contact:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>What to Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Type &quot;Robin&quot;.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Type &quot;Marlow&quot;.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Type &quot;Partner Administrator&quot;.</td>
</tr>
<tr>
<td>E-Mail</td>
<td>Type &quot;<a href="mailto:robin.marlow@noreply.com">robin.marlow@noreply.com</a>&quot;</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

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

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

Each partner sales user must have:

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

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

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

What Oracle Provides for You

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

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

- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative

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

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

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

Note: If you are setting up Oracle Sales Cloud in a Global Single Instance (GSI) environment, then Oracle does not provide these role-provisioning rules for you. You must create them manually.

<table>
<thead>
<tr>
<th>Provisioning Rule Name</th>
<th>Condition</th>
<th>Job or Abstract Roles Provisioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Administrator</td>
<td>Resource Role is Partner Administrator</td>
<td>Partner Administrator</td>
</tr>
</tbody>
</table>
Granting Data Security Privileges to Partner Administrators and Other Custom Users

Oracle Sales Cloud ships with the following data security privileges that permit users to edit their partner hierarchy:

- Add Parent Node
- Add Child Node
- Remove Node

By default, these data security privileges are included as part of the channel sales manager, channel operations manager, and channel account manager roles; however, they are not included with the partner administrator role. If you want your partner administrators or any other custom users you’ve created to have edit level access to their partner hierarchy, you must add these privileges to those user roles. You add these privileges using the standard data security privilege addition process as defined in the Oracle Sales Cloud Implementing Sales guide.

Who Are We Creating?

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

The following table shows the partner sales users for Active Systems, their job title, and the name of the partner account they belong to.

<table>
<thead>
<tr>
<th>Partner Contact Name</th>
<th>Partner Job Role</th>
<th>Partner Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Robin Marlow</td>
<td>Partner Administrator</td>
<td>Active Systems</td>
</tr>
<tr>
<td>Bob Jones</td>
<td>Partner Sales Manager</td>
<td>Active Systems</td>
</tr>
<tr>
<td>Owen Mann</td>
<td>Partner Sales Representative</td>
<td>Active Systems</td>
</tr>
</tbody>
</table>

Creating the Partner Contacts for Active Systems in the UI

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

> **Note:** The partner account to which the partner contact belongs must be in Active status before you can see the Create User Account check box on the Manage User Details page.
Use these steps to manually create the partner contacts for the Active Systems partner account in Oracle Sales Cloud UI.

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

Importing Partner Accounts and Partner Contacts for Channel Sales: Explained

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

For more information about importing data, see the Sales Cloud Understanding File-Based Data Import and Export guide.

The following table provides an overview of the steps to import your partner accounts and their partner contacts. You can open the different import tasks directly from the Import Partner Accounts and Contacts folder in the implementation project. Alternately, you can search for the tasks by name from the Setup and Maintenance work area.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Register the system that is the source of your import data. This one-time setup creates the code that you enter along with the different reference IDs in all of your import files. Oracle permits you to import data from multiple systems, so the reference IDs alone don’t guarantee uniqueness.</td>
<td>Manage Trading Community Source Systems</td>
</tr>
<tr>
<td>2</td>
<td>Export the Party ID for the partner users you have created. You must use the Party IDs to identify the partner resource you want to be the account owner for each partner account you import. Partner account owners see the partner account in the list of My Accounts and.</td>
<td>Schedule Export Processes</td>
</tr>
</tbody>
</table>
### Creating Partners

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Sign in as a setup user and open the Manage File Import Mappings task from the implementation project. Alternatively, setup and sales administrator users can search for the task by name in the Setup and Maintenance work area and open it from there.</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>2</td>
<td>From the Object list on the Manage File Import Mappings page, select the object you want to import. For example:</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>3</td>
<td>For importing partners, select Partner.</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>4</td>
<td>For importing partner contacts, select Partner contact.</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>5</td>
<td>Select the Seeded option.</td>
<td>Manage File Import Mappings</td>
</tr>
</tbody>
</table>

### Downloading the Mapping Template

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

Use this procedure to download templates for importing data into Oracle Sales Cloud using file import.

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

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

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

**Importing Partners and Partner Contacts With File-Based Data Import**

Sales Administrators can use file-based data import to create new partner accounts, to update existing partner accounts, and to add partner contacts (partner sales representatives) to these partner accounts. Oracle Sales Cloud provides several seeded mapping templates for mapping your source file data.

Follow these steps to use file-based data import to import partner accounts and partner contacts (partner sales representatives) for partner accounts.

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

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORGANIZATION_NAME</td>
<td>PNRORG1_ 8-03-1217</td>
<td>PartnerInterface</td>
<td>OrganizationName</td>
</tr>
</tbody>
</table>
## Chapter 6
Creating Partners

### Partner Update/Partner Import for Existing Partner Account

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARTY_ID</td>
<td>100100032154464</td>
<td>PartnerInterface</td>
<td>PartyId</td>
</tr>
<tr>
<td>PARTY_USAGE_CODE</td>
<td>PARTNER</td>
<td>PartnerInterface</td>
<td>PartyUsageCode</td>
</tr>
</tbody>
</table>

### Creating Partners

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>PARTY_USAGE_CODE</td>
<td>PARTNER</td>
<td>PartnerInterface</td>
<td>PartyUsageCode</td>
</tr>
<tr>
<td>OS</td>
<td>CSV</td>
<td>PartnerInterface</td>
<td>PartyOrigSystem</td>
</tr>
<tr>
<td>OSR</td>
<td>PNRORG1_8-03-1217</td>
<td>PartnerInterface</td>
<td>PartyOrigSystemReference</td>
</tr>
<tr>
<td>TREE_CODE</td>
<td>PNRORG1_8-03-1217</td>
<td>PartnerHierarchy</td>
<td>TreeCode</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>US</td>
<td>PrimaryAddress</td>
<td>Country</td>
</tr>
<tr>
<td>ADDRESS1</td>
<td>40968, 6011140046 Satellite</td>
<td>PrimaryAddress</td>
<td>Address1</td>
</tr>
<tr>
<td>CITY</td>
<td>Chattanooga</td>
<td>PrimaryAddress</td>
<td>City</td>
</tr>
<tr>
<td>STATE</td>
<td>TN</td>
<td>PrimaryAddress</td>
<td>State</td>
</tr>
<tr>
<td>POSTAL_CODE</td>
<td>37401</td>
<td>PrimaryAddress</td>
<td>PostalCode</td>
</tr>
<tr>
<td>PHONE_AREA_CODE</td>
<td>958</td>
<td>PrimaryPhone</td>
<td>PhoneAreaCode</td>
</tr>
<tr>
<td>PHONE_COUNTRY_CODE</td>
<td>1</td>
<td>PrimaryPhone</td>
<td>PhoneCountryCode</td>
</tr>
<tr>
<td>PHONE_NUMBER</td>
<td>7818081</td>
<td>PrimaryPhone</td>
<td>PhoneNumber</td>
</tr>
<tr>
<td>ZPM_TREE_STRUCTURE</td>
<td>PARTNER_ORG_TREE_STRU</td>
<td>ImpPartnerP</td>
<td>TreeStructureCode</td>
</tr>
<tr>
<td>ZPM_TREE_CODE</td>
<td>PNRORG1_8-03-1217</td>
<td>ImpPartnerP</td>
<td>TreeCode</td>
</tr>
<tr>
<td>ZPM_OS</td>
<td>CSV</td>
<td>ImpPartnerP</td>
<td>OrigSystem</td>
</tr>
<tr>
<td>ZPM_OSR</td>
<td>PNRORG1_8-03-1217</td>
<td>ImpPartnerP</td>
<td>OrigSystemReference</td>
</tr>
<tr>
<td>ZPM_STATUS</td>
<td>ACTIVE</td>
<td>ImpPartnerP</td>
<td>Status</td>
</tr>
<tr>
<td>ZPM_PUB_STATUS</td>
<td>APPROVED</td>
<td>ImpPartnerP</td>
<td>Public Status</td>
</tr>
</tbody>
</table>
### Partner Import With Custom Attributes or Custom Child Objects

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>partner_datetime</td>
<td>2016-07-04T12:08:56-0700</td>
<td>ImpPartnerP</td>
<td>partner_datetime_c</td>
</tr>
<tr>
<td>partner_longtext</td>
<td>test</td>
<td>ImpPartnerP</td>
<td>partner_longtext_c</td>
</tr>
<tr>
<td>partner_child</td>
<td>partner child import</td>
<td>Partner_child_import_cWBIT</td>
<td>RecordName</td>
</tr>
<tr>
<td>partner_child_text</td>
<td>test</td>
<td>Partner_child_import_cWBIT</td>
<td>partner_child_text_c</td>
</tr>
<tr>
<td>partner_child_company_number</td>
<td>BCOMPANY</td>
<td>Partner_child_import_cWBIT</td>
<td>COMPANY_NUMBER</td>
</tr>
<tr>
<td>partner_company_number</td>
<td>BCOMPANY</td>
<td>ImpPartnerP</td>
<td>CompanyNumber</td>
</tr>
<tr>
<td>partner_child_datetime</td>
<td>2016-07-04T12:08:56-0700</td>
<td>Partner_child_import_cWBIT</td>
<td>partner_child_datetime_c</td>
</tr>
</tbody>
</table>

Your custom child object name and custom field attributes will be different than what is shown in the preceding table.

### Create Partner Contacts

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner_RelationshipOS</td>
<td>CSV</td>
<td>Partner</td>
<td>RelOrigSystem</td>
</tr>
<tr>
<td>Partner_RelationshipOSR</td>
<td>tina. best@bigcomputers. comrelationship</td>
<td>Partner</td>
<td>RelOrigSystemReference</td>
</tr>
</tbody>
</table>

<p>| Partner_RelType    | CONTACT                     | Partner    | RelationshipType       |</p>
<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner__RelCode</td>
<td>CONTACT_OF</td>
<td>Partner</td>
<td>RelationshipCode</td>
</tr>
<tr>
<td>Partner_OS</td>
<td>CSV</td>
<td>Partner</td>
<td>ObjOrigSystem</td>
</tr>
<tr>
<td>Partner_OSR</td>
<td>tina.best123</td>
<td>Partner</td>
<td>ObjOrigSystemReference</td>
</tr>
<tr>
<td>PersonProfile__FirstName</td>
<td>Tina</td>
<td>PersonProfile</td>
<td>PersonFirstName</td>
</tr>
<tr>
<td>PersonProfile__LastName</td>
<td>Best</td>
<td>PersonProfile</td>
<td>PersonLastName</td>
</tr>
<tr>
<td>PersonProfile__OS</td>
<td>CSV</td>
<td>PersonProfile</td>
<td>PartyOrigSystem</td>
</tr>
<tr>
<td>PersonProfile__OSR</td>
<td><a href="mailto:tina.best@bigcomputers.comperson">tina.best@bigcomputers.comperson</a></td>
<td>PersonProfile</td>
<td>PartyOrigSystemReference</td>
</tr>
<tr>
<td>Email_EmailOS</td>
<td>CSV</td>
<td>Email</td>
<td>CpOrigSystem</td>
</tr>
<tr>
<td>Email_EmailOSR</td>
<td><a href="mailto:tina.best@bigcomputers.comemail">tina.best@bigcomputers.comemail</a></td>
<td>Email</td>
<td>CpOrigSystemReference</td>
</tr>
<tr>
<td>Email_RelOS</td>
<td>CSV</td>
<td>Email</td>
<td>RelOrigSystem</td>
</tr>
<tr>
<td>Email_RelOSR</td>
<td><a href="mailto:tina.best@bigcomputers.comrelationship">tina.best@bigcomputers.comrelationship</a></td>
<td>Email</td>
<td>RelOrigSystemReference</td>
</tr>
<tr>
<td>Email_EmailAddress</td>
<td><a href="mailto:tina.best@bigcomputers.com">tina.best@bigcomputers.com</a></td>
<td>Email</td>
<td>EmailAddress</td>
</tr>
<tr>
<td>Email_EmailPrimaryFlag</td>
<td>Y</td>
<td>Email</td>
<td>PrimaryFlag</td>
</tr>
<tr>
<td>Phone_OS</td>
<td>CSV</td>
<td>PrimaryPhone</td>
<td>CpOrigSystem</td>
</tr>
<tr>
<td>Phone_OSR</td>
<td><a href="mailto:tina.best@bigcomputers.comphone">tina.best@bigcomputers.comphone</a></td>
<td>PrimaryPhone</td>
<td>CpOrigSystemReference</td>
</tr>
<tr>
<td>Phone_RelOS</td>
<td>CSV</td>
<td>PrimaryPhone</td>
<td>RelOrigSystem</td>
</tr>
<tr>
<td>Phone_RelOSR</td>
<td><a href="mailto:tina.best@bigcomputers.comrelationship">tina.best@bigcomputers.comrelationship</a></td>
<td>PrimaryPhone</td>
<td>RelOrigSystemReference</td>
</tr>
<tr>
<td>PhoneLineType</td>
<td>GEN</td>
<td>PrimaryPhone</td>
<td>PhoneLineType</td>
</tr>
<tr>
<td>Phone__RawPhoneNumber</td>
<td>6505061234</td>
<td>PrimaryPhone</td>
<td>RawPhoneNumber</td>
</tr>
<tr>
<td>PrimaryAddress__AddrOS</td>
<td>CSV</td>
<td>PrimaryAddress</td>
<td>LocationOrigSystem</td>
</tr>
</tbody>
</table>

Oracle Sales Cloud
Getting Started with Oracle Partner Relationship Management
Chapter 6
Creating Partners
<table>
<thead>
<tr>
<th>Column Header</th>
<th>Example Value</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>PrimaryAddress._AddrOSR</td>
<td><a href="mailto:tina.best@bigcomputers.comaddress">tina.best@bigcomputers.comaddress</a></td>
<td>PrimaryAddress</td>
<td>LocationOrigSystemReference</td>
</tr>
<tr>
<td>PrimaryAddress._RelOS</td>
<td>CSV</td>
<td>PrimaryAddress</td>
<td>RelOrigSystem</td>
</tr>
<tr>
<td>PrimaryAddress._RelOSR</td>
<td><a href="mailto:tina.best@bigcomputers.comrelationship">tina.best@bigcomputers.comrelationship</a></td>
<td>PrimaryAddress</td>
<td>RelOrigSystemReference</td>
</tr>
<tr>
<td>PrimaryAddress._Address1</td>
<td>1234 InnovationWay</td>
<td>PrimaryAddress</td>
<td>Address1</td>
</tr>
<tr>
<td>PrimaryAddress._City</td>
<td>San Mateo</td>
<td>PrimaryAddress</td>
<td>City</td>
</tr>
<tr>
<td>PrimaryAddress._State</td>
<td>CA</td>
<td>PrimaryAddress</td>
<td>State</td>
</tr>
<tr>
<td>PrimaryAddress._Country</td>
<td>US</td>
<td>PrimaryAddress</td>
<td>Country</td>
</tr>
<tr>
<td>PrimaryAddress._Zip</td>
<td>94401</td>
<td>PrimaryAddress</td>
<td>PostalCode</td>
</tr>
<tr>
<td>ResProfile._CreateUserAccount</td>
<td>Y</td>
<td>ResourceProfile</td>
<td>CreateUserAccount</td>
</tr>
<tr>
<td>ResProfile._RoleCode</td>
<td>PARTNER_SALES_REPRESENTATIVE</td>
<td>ResourceProfile</td>
<td>RoleCode</td>
</tr>
<tr>
<td>ResProfile._RoleTypeCode</td>
<td>PARTNER</td>
<td>ResourceProfile</td>
<td>RoleTypeCode</td>
</tr>
<tr>
<td>ResOrg._ManagerOS</td>
<td></td>
<td>ResourceOrganizationMembership</td>
<td>ManagerPartyOrigSystem</td>
</tr>
<tr>
<td>ResOrg._ManagerOSR</td>
<td></td>
<td>ResourceOrganizationMembership</td>
<td>ManagerPartyOrigSysRef</td>
</tr>
<tr>
<td>ResOrg._OrganizationName</td>
<td>Big Computers</td>
<td>ResourceOrganizationMembership</td>
<td>OrganizationName</td>
</tr>
<tr>
<td>ResOrg._OrganizationUsage</td>
<td>PARTNERRESOURCE_ORG</td>
<td>ResourceOrganizationMembership</td>
<td>OrganizationUsage</td>
</tr>
<tr>
<td>ResOrg._TreeCode</td>
<td>PNRORG1_05-02-1234</td>
<td>ResourceOrganizationMembership</td>
<td>TreeCode</td>
</tr>
<tr>
<td>ResOrg._RoleTypeCode</td>
<td></td>
<td>ResourceOrganizationMembership</td>
<td>RoleTypeCode</td>
</tr>
<tr>
<td>Job._PrimaryFlag</td>
<td>PARTNER</td>
<td>Job</td>
<td>PrimaryFlag</td>
</tr>
</tbody>
</table>

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

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

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

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

   After the import activity successfully completes, the Status column on the Manage Import Activities page displays **Completed**.
7 Configuring Data Migration for Channel Sales

Channel Sales Data Migration: Overview

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

You can move this data by either manually recreating the data in Oracle Sales Cloud, or by importing the data using file-based data import. If you only have a few records for a particular business object, such as partner programs, you can opt to manually recreate the records in Oracle Sales Cloud. However, if you have a large volume of records for a particular business object, then you are better off using file-based data import to move the records across to Oracle Sales Cloud.

The types of data you can migrate using file-based data import include:

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

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

For more information about importing data, see the Sales Cloud Understanding File-Based Data Import and Export guide.

Importing Deal Registrations for Channel Sales: Explained

Partners use deal registrations to request exclusive rights, preferred pricing, or additional support for a deal from the channel organization. Deal registrations permit partners to inform their channel organization about a deal and by being the first to do so, the partner receives priority for the deal. If you have existing deal registrations in your legacy system, you can either manually recreate them in Oracle Sales Cloud, or you can use the file-based data import process to migrate these records. You can use file-based data import to create new deal registrations or to update existing deal registrations in Oracle Sales Cloud.

Deal registration import involves following target objects:

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

Downloading the Mapping Templates for Deal Registration Import

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

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

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

Mapping Deal Registration Products

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal</td>
<td>DealNumber or DealId</td>
</tr>
<tr>
<td>Deal Product</td>
<td>DealProductNumber or DealProdId</td>
</tr>
<tr>
<td>Product Item</td>
<td>InventoryItemid or ItemNumber</td>
</tr>
<tr>
<td>Product Group</td>
<td>ProductGroupId or ProdGroupInternalName</td>
</tr>
<tr>
<td>Product Organization</td>
<td>InvOrgId or InvOrgCode</td>
</tr>
</tbody>
</table>

Mapping Deal Registration Resources

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal</td>
<td>DealNumber or DealId</td>
</tr>
<tr>
<td>Deal Resource</td>
<td>DealResourceId or DealResourceNumber</td>
</tr>
</tbody>
</table>
### Attribute Name

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Party</td>
<td>ResourcePartyId or ResourcePartyNumber or ResourcePartyOrigSysRef or ResourcePartyOrigSysRef</td>
</tr>
<tr>
<td>Partner Organization</td>
<td>PartnerOrgOrigSys and PartnerOrgOrigSysRef or PartnerOrgId</td>
</tr>
<tr>
<td>Member Function</td>
<td>MemberFunctionCode</td>
</tr>
</tbody>
</table>

### Mapping Deal Registrations

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

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Attribute Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal</td>
<td>DealNumber or DealId</td>
</tr>
<tr>
<td>Owner</td>
<td>OwnerId</td>
</tr>
<tr>
<td>Partner</td>
<td>PartnerNumber or PartnerId or both PartnerOrigSys and PartnerOrigSysRef</td>
</tr>
<tr>
<td>Type</td>
<td>DealType</td>
</tr>
<tr>
<td>Status</td>
<td>DealStatus</td>
</tr>
<tr>
<td>Opportunity</td>
<td>OptyNumber or OptyId</td>
</tr>
<tr>
<td>Lead</td>
<td>LeadNumber or LeadId</td>
</tr>
<tr>
<td>Resource</td>
<td>ResourceOrigSys and ResourceOrigSysRef or ResourceNumber</td>
</tr>
</tbody>
</table>

### Importing Deal Registrations

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

1. Sign in with your sales administrator credentials.
2. From Navigator, click **Setup and Maintenance**.
3. Search for and select the **Manage File Import Activities** task.
4. On the Manage File Import Objects page, click **Create**.
5. In the Name field on the Create Import Activity page, type a name for your deal registration import activity.
6. Indicate where you stored the import mapping template.
7. Select the **Header row included** option.
8. Click **Next**.
9. Ensure the Select Import Mapping page, reflects the correct mapping for your selected import mapping template, and click **Next**.
10. On the Create Schedule page, select **Immediate** from the Schedule list, and click **Next**.
11. On the Review and Activate page, click **Activate**.
8 Setting Up Sales Territories and Assignment for Channel Sales

Territories, Assignment, and Channel Sales: Overview

Since the initial assumption made in this guide is that you have already configured Oracle Sales Cloud for direct sales and now you want to add a channel sales branch to your direct sales organization, this section will not go into great detail about territories and assignment. Instead, this section provides a brief explanation of territories and assignment, the territory types used in channel sales, the type or types of assignment allowed for each channel sales object, and what the high-level process is to configure territories and assignment for channel sales.

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

- Oracle Sales Cloud - Getting Started with Your Implementation guide
- Oracle Sales Cloud - Implementing Sales Cloud

What are Territories?

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

What Territory Types Does Channel Sales Use?

Channel sales utilizes two territory types:

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

The following coverage models define channel sales manager type territories:

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

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

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

What are Dimensions?

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

Exposing Dimensions

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

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

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

Adding Dimensions to a Territory

Use these steps to add dimensions to a selected territory.

1. Sign in with your sales administrator credentials.
2. Ensure you are in a sandbox.
3. Search for and select the Manage Territory Proposals task.
4. On the Manage Territory Proposals page, click the name of the territory proposal that contains the territory you want to edit.
5. From the list of territories in that territory proposal, click the name of the territory you want to edit.
6. In the Details area, click the Coverages tab.
7. Click the Add icon or, from the Actions menu, select Add.
8. On the Edit Coverage page, select the dimension you want to add from the Dimensions list.
9. Move the dimension members you want to add to the territory from the Available Dimension Members list to the Selected Dimension Members list.
10. Click Save and Close to save your work.

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

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

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

What are Mappings and Mapping Sets?
Mappings and mapping sets drive territory-based assignment. Mappings identify the dimensions, attributes, and territory filtering used during assignment processing.

There are three types of mappings:

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

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

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

<table>
<thead>
<tr>
<th>Channel Sales Object Name</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Account</td>
<td>Manage Sales Assignment Manager Objects</td>
</tr>
<tr>
<td>Lead</td>
<td>Manage Sales Lead Assignment Object</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Manage Sales Assignment Manager Objects</td>
</tr>
<tr>
<td>Revenue</td>
<td>Manage Sales Assignment Manager Objects</td>
</tr>
<tr>
<td>Deal Registration</td>
<td>Manage Sales Lead Assignment Object</td>
</tr>
</tbody>
</table>

How do I Configure Channel Sales Territories?

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

1. Configure Oracle Sales Cloud for the types of sales territories you plan to create:
   a. If you are setting up channel sales territories based on geography, you must enable the geographical elements you plan to use during territory setup for the countries for which you imported geography reference information. Optionally, you can organize the geography elements into zones.
   b. You must enable the territory dimensions you plan to use in your channel sales territories.

2. Set up the channel sales territories themselves. This step involves:
   a. Creating a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup, so it becomes useful when you want to readjust your territories in the future. If you use the simplified UI to change territories, your changes become active immediately.
   b. Create the hierarchy of channel sales territories in the territory proposal starting with the top territory and working your way down.
   c. Activate the territory proposal.

3. Configure your assignment options. Assignment behavior is controlled by a set of system profile options. By default, the Oracle Sales Cloud does the following:
   o Automatically assigns sales territories to accounts whenever an account is created or updated.
   o Assignment of opportunities is manual: partner salespeople can either trigger the assignment process while editing an individual opportunity or the opportunities are assigned by the Sales Account Assignment Process which you set up to run periodically. Oracle sets manual assignment for opportunities as the default behavior to prevent performance issues for companies with large number of opportunities (100,000 and up). However, if your organization does not have such a large volume, you can have the application assign the opportunity automatically by setting the Assignment Submission at Save Enabled profile option to Yes.
4. Run the following assignment processes to assign account and opportunities respectively:
   - Request Account Assignments
   - Revenue Territory Territory Based Assignment

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

Channel Sales Manager Territory Example

The following image shows how to set up a basic set of channel sales manager territories to support the two business use cases discussed throughout this guide. This example builds on the direct sales territory hierarchy established in the Getting Started with Oracle Sales Cloud guide.

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

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

Configuring Channel Sales Territories for Partner Accounts

You can assign territories to partner accounts based on certain partner attributes. The attributes used for assignment are governed by a set of mappings between two objects, the work or assignment object, and the candidate object. Oracle Sales Cloud is preconfigured for Partner Account Territory Based Assignment. This process matches partner attributes with territory definitions and is controlled by the Manage Sales Assignment Manager Objects task. With territory based assignment for partner accounts, the work object is Partner Account, the candidate object is Partner Account Territory, and the child work objects are:

- Geography
- Customer Size
- Industry
- Organization Type

Mapping the Work Object to the Candidate Object

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

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

The following table shows the values you need to map the Belongs To attributes for partners, the coverage model needed, and the territory type needed.

<table>
<thead>
<tr>
<th>Partner Account Work Object</th>
<th>Partner Account Territory Candidate Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Address of the Partner</td>
<td>Geography</td>
</tr>
<tr>
<td>Organization Size</td>
<td>Customer Size</td>
</tr>
<tr>
<td>Industry</td>
<td>Industry</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Organization Type</td>
</tr>
<tr>
<td>Auxiliary 1 (Disabled)</td>
<td>Auxiliary 1 (Disabled)</td>
</tr>
<tr>
<td>Auxiliary 2 (Disabled)</td>
<td>Auxiliary 2 (Disabled)</td>
</tr>
<tr>
<td>Auxiliary 3 (Disabled)</td>
<td>Auxiliary 3 (Disabled)</td>
</tr>
</tbody>
</table>
The following table shows the values you need to map the Serves attributes for partners, the coverage model needed, the territory type needed, and the rule type code needed.

<table>
<thead>
<tr>
<th>Partner Account Work Object</th>
<th>Partner Account Territory Candidate Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>N/A</td>
<td>Coverage Model = Partner Centric</td>
</tr>
<tr>
<td>N/A</td>
<td>Type = Channel Sales Manager</td>
</tr>
</tbody>
</table>

Configuring Automatic Territory Assignment for Partner Accounts

You can configure use the following profile options to control automatic territory assignment for partner accounts:

- Partner create - set the ZPM_TERRITORY_ASSIGNMENT_ON_PARTNER_CREATE profile option to ‘Y’.
- Partner update - set the ZPM_TERRITORY_ASSIGNMENT_ON_PARTNER_UPDATE profile option to ‘Y’.

These profile options allow automatic territory assignment when you create a new partner, or when you click Save or Save and Close after updating partner information.

If you set the ZPM_TERRITORY_ASSIGNMENT_ON_PARTNER_UPDATE profile option to ‘N’, assignment manager does not run. However when you update one or more of the partner information fields used for territory mapping, the REASSIGN_TERRITORY indicator on partner profile changes to ‘Y’. This indicator lets you know that one or more of the fields used for territory mapping has been updated, and you need to run assignment manager.

You can schedule a batch job to run for all partners that have REASSIGN_TERRITORY set to ‘Y’. When assignment manager runs for those partners, the REASSIGN_TERRITORY indicator changes back to ‘N’.

ORACLE
Assigning Channel Sales Manager Territories to Leads: Explained

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

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

What Profile Options Control Lead Assignment?

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

The following table shows the profile options to configure for lead assignment.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKL_LEAD_ASSIGNMENT_RULE</td>
<td>The assignment rule set group for territory based lead assignment, which assigns territories to the lead territory team. The rule set group containing the rules that are used to filter matching territories following territory matching. This profile option is optional, and if not set, rule filtering will not be performed and all matching territories will be assigned.</td>
</tr>
<tr>
<td>MKL_LEAD_ASSIGNMENT_MATCHING_RULE</td>
<td>The assignment rule set group for rule based lead assignment which assigns resources to the lead sales team.</td>
</tr>
<tr>
<td>MKL_LEAD_ASSIGNMENT_SCORE_RULE</td>
<td>The assignment rule set group for scoring leads. This computes and designates a score for each lead. For example, it assigns a value between 0 and 100 to the lead based on your business criteria.</td>
</tr>
<tr>
<td>MKL_LEAD_ASSIGNMENT_RANK_RULE</td>
<td>The assignment rule set group for ranking leads, which determines the value of the rank based on the business criteria defined in the rules.</td>
</tr>
<tr>
<td>MKL_LEAD_ASSIGNMENT_QUAL_RULE</td>
<td>The assignment rule set group for qualifying leads, which determines the value of the lead status based on the business criteria defined in the rules.</td>
</tr>
<tr>
<td>MKL_LEAD_DEFAULT_ASGN_MODE</td>
<td>Determines whether TBA, RBA or BOTH will be used.</td>
</tr>
</tbody>
</table>
How Does Territory Based Assignment to Leads Work?

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

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

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

How Does Rule Based Assignment of Leads Work?

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

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

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

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

Mapping Objects to Candidate Objects for Leads

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

The mapping sets for leads are:

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

For more information about lead assignment, see the following guides:

- Sales Cloud Getting Started With Your Implementation
- Sales Cloud Implementing Sales

## Assigning Channel Sales Manager Territories to Opportunities: Explained

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

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

### What Profile Options Control Opportunity Team Assignment?

The following table shows the profile options that control opportunity team assignment and other opportunity team functionality.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Assignment Mode</td>
<td>Determines the types of assignment modes allowed during opportunity assignment.</td>
</tr>
<tr>
<td>Opportunity Resource Deal Protection Period</td>
<td>Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment. The default value is 0.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Access Level Default</td>
<td>Determines the default access level for partner resources added to the opportunity sales team. The default value is No Access.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Function Default</td>
<td>Determines the default function for partner resources added to the opportunity sales team. The default value is Integrator.</td>
</tr>
<tr>
<td>Territory Based Resource Assignment Style</td>
<td>Determines whether to copy all territory resources to the opportunity team or just the territory owner during territory assignment. The default value is All.</td>
</tr>
<tr>
<td>Sales Team Member Assignment Rule Set Group</td>
<td>Specifies the rule set name that is used during rule-based assignment triggered by assignment manager.</td>
</tr>
<tr>
<td>Sales Team Member Recommendation Rule Set Group</td>
<td>Specifies the rule set name used during rule-based assignment when a user uses the team recommendations functionality.</td>
</tr>
</tbody>
</table>
How Does Territory Based Assignment of Revenue Items Work?
The following steps provide a high-level explanation of territory based assignment of revenue items.

1. The assignment process automatically identifies matching territories based on:
   - The associated sales account (includes most matching attributes)
   - Values that are unique to revenue, such as product or sales channel
2. Opportunity Management then assigns the territories to the revenue line items while taking into consideration deal protection settings you have configured.
   - The territory owner and team members gain full access to the opportunity.
3. Opportunity Management adds the revenue items to the Opportunity team. The Owner field does not change, but the assignment process expands the visibility of the record.

How Does Rule Based Assignment of Opportunities to Resources Work?
The following steps provide a high-level explanation of rule based assignment of opportunities to resources.

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

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

Assigning Channel Sales Manager Territories to Deal Registrations: Explained
This topic lists the profile options you can configure for deal registration assignment, and it explains how to assign channel sales manager territories to deal registrations.

What Profile Options Control Deal Registration Assignment?
The following table shows the profile options to configure for deal registration assignment.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKL_DEAL_DEFAULT_ASGN_MODE</td>
<td>Controls the type of assignment used for deal registrations. The default value is Rule-Based Assignment Only. You can change this value to Territory-Based Assignment Only or to Both.</td>
</tr>
</tbody>
</table>
### Understanding the Deal Territory Mapping

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

The following table provides the mapping sets for deal registrations:

<table>
<thead>
<tr>
<th>Candidate: Deal Territory</th>
<th>Deal Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography</td>
<td>Account Geography</td>
</tr>
<tr>
<td>Product(s)</td>
<td>Products</td>
</tr>
<tr>
<td>Literal</td>
<td>CHANNELSALESMANAGER</td>
</tr>
</tbody>
</table>

### How Does Territory Based Assignment to Deal Registrations Work?

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

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

Business Intelligence for Oracle Partner Relationship Management: Overview

Oracle Partner Relationship Management provides various analytics for your users. In most cases, you must first enable these analytics before your users can leverage these tools. This chapter provides you with an introduction to all the places across Oracle Sales Cloud where your users can access and leverage business intelligence. You will also learn how to turn on and customize those analytics.

What’s Available?

Oracle Sales Cloud provides many locations where your users can access business intelligence.

<table>
<thead>
<tr>
<th>Oracle Sales Cloud Area</th>
<th>What’s Available</th>
</tr>
</thead>
</table>
| Sales Infolets Page           | This page, which users get to by navigating from the Welcome springboard using the white navigation dots just below the search field, provides infolet summaries customized for the roles in your organization. These infolet analyses are available on mobile, tablet, or laptop. Use this page for on-the-go snapshots of key data. Clicking an infolet drills down to more detail.  
For Channel Account Managers, this Sales Infolets page is already visible and automatically displays with prepackaged infolets. You can further modify this page, if you need to.  
For all other users, you must first enable the Sales Infolets page, and then add infolets to them.                                                                                           |
| Analytics Tabs                | Many work areas throughout Oracle Sales Cloud, including the Analytics work area, provide additional Analytics tabs in context for easier access to business intelligence. These tabs appear along the side of the page.  
Typically, administrators or the Channel Operations Manager customize these tabs for users.  
For example, the Marketing Development Fund (MDF) work area provides three Analytics tabs that you can add. You must add the tabs to the work area first, then use Page Composer to add the reports.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                removeClass="table-row"

| Analytics Work Area           | From the springboard, click Sales and then click Analytics. Analyses are managed on this page.  
The landing page in the Analytics work area is available by default. This is the one area which end users personalize for themselves:  
• Users can search and launch any report available to them. The list of reports that users can search and see is controlled by administrators or the Channel Operations Manager.  
• Users can view Favorites (which they designate as such, themselves), or recently viewed analyses.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
Enabling Business Intelligence

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

1. Assign the right privileges to each role. Users with each role can then view the various analytics that you provide, or so they can add it themselves.
2. Optionally change the currency for each of your users, so that data appears correctly in reports.
3. For partners only:
   Enable partner access to BI content.
   (Channel users already have access to BI content.)
4. Finally, add BI content to Oracle Sales Cloud pages.

Managing Access to Business Intelligence: Explained

Oracle Partner Relationship Management provides many locations across Oracle Sales Cloud where your users can access business intelligence. In most cases, you must first enable these analytics before your users can leverage these tools. This topic is meant for the administrator who manages security for all users, including users with the Channel Operations Manager role. As the administrator, you must grant the right permissions so that your users can access the analytics made available to them, or so that they can add their own.

Manage Page Composer Access for the Channel Operations Manager

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

1. In OIM, assign the Channel Operations Manager role to your users who customize analytics.
   You must also assign the required external job roles for whom the channel operations manager is customizing analytics. Assign the required external job roles so that these users can enable analytics for those roles.
   For example, if a certain user typically customizes BI content for partners, then you must assign all partner external job roles to that user. Once assigned, that user can access the Customize Page option on a page enabled for Page Composer, select a partner external job role, and customize BI content for that page and role.

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

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

To make the Add Content button visible, navigate to APM or the Security Console and assign the **Customize Sales UI to Channel Operations Manager** functional security policy to the Channel Operations Manager.

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

Grant Access to the Sales Infolets Page

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

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

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

Manage Access for Custom Partner Roles

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

Partner Relationship Management provides the below roles for partners.

<table>
<thead>
<tr>
<th>Job Role (External)</th>
<th>Application Role</th>
<th>BI Duty Role</th>
<th>BI Application Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Administrator</td>
<td>Partner Administrator</td>
<td>Partner Organization Transaction Analysis Duty</td>
<td>BI Consumer</td>
</tr>
<tr>
<td>Partner Sales Manager</td>
<td>Partner Sales Manager</td>
<td>Partner Organization Transaction Analysis Duty</td>
<td>BI Consumer</td>
</tr>
<tr>
<td>Partner Sales Representative</td>
<td>Partner Sales Representative</td>
<td>Partner Organization Transaction Analysis Duty</td>
<td>BI Consumer</td>
</tr>
</tbody>
</table>

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

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

   The duty role selection depends on what you need this custom role for.
3. Create an OBI application role in the Security Console.
   - a. In the Security Console, map this application role to the external job role.
   - b. In the Security Console, map this application role to a BI Duty Role.
For example, to create a custom partner external job role, map this application role to the Partner Organization Transaction Analysis Duty role.

**c.** In the Security Console, map this application role to one of these roles:

- Transactional Business Intelligence Worker
- Business Intelligence Applications Worker

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

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

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

   **c.** In the Security Console, map this application role to one of these roles:

   - Transactional Business Intelligence Worker
   - Business Intelligence Applications Worker

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

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

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

### Displaying Partner Data in Reports: Explained

To ensure that partner data is displayed in the right currency on reports, each end user should optionally set up their own reports currency. If this step is skipped, then reports will display data in the default currency. Work with your end users to be sure they set up their own reports currency, if desired.

### Setting Up Your Reports Currency

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

To set up your reports currency:

1. Navigate to Business Intelligence.
2. Click **Reports and Analytics** in the navigator menu.
3. Click **Browse Catalog**.
4. Click the drop-down arrow and Choose **My Account**.
5. Go to the **Preferences**.
6. Select your choice in **Currency**.
Enabling Partner Access to BI Content: Explained

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

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

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

1. First, move the intelligence content to a BI directory that’s visible to partners.
2. Next, add the intelligence content to Oracle Sales Cloud user interface pages.

Partners can’t create and add their own analytics to Sales Cloud pages.

Create Custom BI Directories for Partner Content

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

To create custom BI directories for partner content:

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

Hide Unnecessary Content from Partners

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

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

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

To remove partner access from these directories:

1. Log in to BI Answers as a user with the Channel Operations Manager external job role.
2. Navigate to /Shared Folders/Custom.
3. Select a custom directory (other than the Customer Relationship Management directory) and, in the right pane, open the Permissions dialog by navigating More > Permissions. For example:
   /Shared Folders/Custom/Financials
4. In the Permissions dialog, add the Partner Org Transaction Analysis Duty role and select No Access.
5. Repeat steps 3 and 4:
   a. For all objects (directories and reports) directly under the Custom directory.
   b. For all objects (directories and reports) under the Customer Relationship Management directory, except the partner-specific custom directories you previously created.

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

Make Content Available to Partners

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

Partner content is delivered in this location:

/Shared Folders/Sales/Embedded Content/

Follow these instructions to copy content to your new custom directories.

1. **Oracle-Provided Partner BI Content**

   Partner reports that Oracle provides are placed here:

   /Shared Folders/Sales/Embedded Content/

   Partners can't access this directory.

   To make this content accessible to partners:

   a. **Reports**

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

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

      These reports are now accessible by partners.
Note: If the report uses a saved filter, then you must move the saved filter as well. Then, edit the report to ensure that it uses the new saved filter, now located in a custom directory.

**b. Dashboards**

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

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

Let’s look at an example:

i. Copy the Stalled Opportunities for Partner Representative dashboard from /Shared Folders/Sales/Embedded Content/Partner Sales Representative/Dashboards to /Shared Folders/Custom/Customer Relationship Management/Partner Sales Representative/Dashboards.

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

iii. Next, in the custom Dashboard directory, edit the dashboard so that the dashboard points to the report in the custom partner directory.

```plaintext
a. On the dashboard, delete the existing Drill To: Stalled Opportunities for Partner Representative from section 1.
b. Expand the Catalog section from the bottom left.
c. Pull the hidden report from /Shared Folders/Custom/Customer Relationship Management/Partner Sales Representative.
d. Save the dashboard.
```

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

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

**2. Custom Partner BI Content**

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

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

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

**Add Content to Partner Pages**

Once you have moved partner BI content to directories that are accessible to partners, you can add that content to partner pages in Oracle Sales Cloud.
When partners log into Oracle Sales Cloud, they can access this content.

Related Topics
- Creating Analytics with Subject Areas

Adding Analytics to Oracle Sales Cloud Pages

Working with Sales Infolets: Explained

The Sales Infolets page provides infolet summaries customized for the roles in your organization. Use this page for on-the-go snapshots of key data. These infolet analyses are available for the simplified UI on mobile, tablet, or laptop browsers. Clicking an infolet drills down to more detail. To navigate to the Sales Infolets page, click the white navigation dots just below the search field on the Welcome springboard.

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

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

Enabling the Sales Infolets page involves three steps:

1. A user with the IT Security Manager role must enable the Sales Infolets page for display to Channel Operations Managers and other users.
2. The Channel Operations Manager must copy the analytics to custom folders for all partner users.
3. Using Page Composer, the Channel Operations Manager can now display the analytics on the Sales Infolets page for partner users.
   For Channel Account Managers and Channel Sales Managers, however, they can add/update/remove their own infolets using Page Composer.

Display the Sales Infolets Page

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

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

Make Reports Visible to Partner Users

Reports are available in the Embedded Content directory.

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

See: "Enabling Partner Access to BI Content: Explained" for more information.
Add Infolets to the Sales Infolets Page

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

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

Related Topics
- Customizing the Sales Infolet Pages

Channel Account Manager Infolet Page: Explained

Channel Account Managers use this page to get a quick snapshot of quotas, how partners are moving deals through the pipeline, and where they need to focus for best results.

This screenshot shows an example of the Sales Infolets page that displays for Channel Account Managers.

You can drill down from each infolet tile to a more detailed report. For example, here’s an example of what you will see when you click the Open Pipeline infolet tile.
Channel Account Manager Infolets and Detailed Reports

The following table lists the Channel Account Manager analytics on the Sales Infolet page.

<table>
<thead>
<tr>
<th>Infolet Title</th>
<th>Infolet Contents</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual vs. Quota</td>
<td>For the current quarter, this infolet shows the total quota assigned to the signed in Channel Account Manager, along with the actual revenue won by the partners of the Channel Account Manager. This analysis is exposed on the Sales Infolets page. Detail: Actual vs. Quota for Channel Account Manager. The detail report includes a gauge that displays the percentage of quota attained in the current quarter.</td>
<td>Tile: /Shared Folders/ Sales/Embedded Content/ Channel Account Manager/ Dashboards</td>
</tr>
<tr>
<td>Top Open Opportunities</td>
<td>This infolet shows the top open opportunities (Win Probability &gt; 70%) in the pipeline by count and amount. This analysis is filtered to display opportunities with partners owned by the logged-in Channel Account Manager.</td>
<td>Tile: /Shared Folders/ Sales/Embedded Content/ Channel Account Manager/ Dashboards</td>
</tr>
</tbody>
</table>
### Infolet Title

<table>
<thead>
<tr>
<th>Infolet Title</th>
<th>Infolet Contents</th>
</tr>
</thead>
</table>
| **This analysis is exposed on the Sales Infolets page.**

**Detail: Top Open Opportunities for Channel Account Manager**

The detail report uses key information such as Win %, Name, Customer, Partner, Sales Stage, Close Date, and Amount.

| Stalled Opportunities | Tile: Stalled Opportunities
|-----------------------|---------------------------------------------------------------|
| This infolet shows opportunities expected to close in the current quarter that are stuck in the pipeline. Stalled is defined as open for a time period longer than the average duration of the sales stage. This infolet also filters opportunities with partners owned by the signed in Channel Account Manager.

**This analysis is exposed on the Sales Infolets page.**

**Detail: Stalled Opportunities for Channel Account Manager**

The detail report uses key information such as Win %, Name, Account, Sales Stage, Days (stalled), Close Date, Amount, and Partner.

| Open Pipeline | Tile: Open Pipeline
|----------------|---------------------------------------------------------------|
| This infolet shows the total revenue and the number of open opportunities closing in the current and next quarter from partners owned by the signed in Channel Account Manager.

**This analysis is exposed on the Sales Infolets page.**

**Detail: Open Pipeline for Channel Account Manager**

The detail report displays a chart of opportunities closing in the current quarter grouped by sales stage. The Channel Account Manager can see open opportunities closing in the next quarter and grouped by partner, and can click each bar on the chart to obtain a detailed list of the related opportunities.

| Deals | Tile: Deal Registration
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>This infolet shows &quot;pending approval&quot; deal registrations that are submitted by partners who the Channel Account Manager has access to.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th>Tile: /Shared Folders/ Sales/Embedded Content/ Channel Account Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Detail: /Shared Folders/ Sales/Embedded Content/ Channel Account Manager/ Dashboards</td>
</tr>
<tr>
<td>Infolet Title</td>
<td>Infolet Contents</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------</td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
</tr>
<tr>
<td></td>
<td>Detail: Deal Registration for Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>The detail report uses key information such as Submitted Date, Partner, Customer Deal Size, Close Date, and Deal Number.</td>
</tr>
<tr>
<td>Partner Performance</td>
<td>Tile: Partner Performance</td>
</tr>
<tr>
<td></td>
<td>This infolet shows the name of the top performing partner and the amount of won revenue in the current quarter. This analysis is filtered to display only those partners owned by the signed in Channel Account Manager.</td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
</tr>
<tr>
<td></td>
<td>Detail: Partner Performance for Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>The detail report uses key information such as Partner Name, Amount Won, and Number of Opportunities Won.</td>
</tr>
<tr>
<td>Partner Status</td>
<td>Tile: Partner Status</td>
</tr>
<tr>
<td></td>
<td>This infolet shows the number of partners who are currently awaiting activation by the channel manager organization. This analysis is filtered to display only those partners where the signed in user is part of the account team.</td>
</tr>
<tr>
<td></td>
<td>This analysis is available, but not automatically displayed, on the Sales Infolets page.</td>
</tr>
<tr>
<td></td>
<td>Detail: Partner Status for Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>The detail report uses key information such as Partner Name and Status.</td>
</tr>
<tr>
<td>MDF</td>
<td>Tile: MDF Requests for CAM</td>
</tr>
<tr>
<td></td>
<td>This infolet shows &quot;pending approval&quot; MDF requests submitted by partners owned by the signed in Channel Account Manager.</td>
</tr>
<tr>
<td></td>
<td>This analysis is available, but not automatically displayed, on the Sales Infolets page.</td>
</tr>
<tr>
<td></td>
<td>Detail: MDF Detail Report for CAM</td>
</tr>
<tr>
<td></td>
<td>The detail report uses key information such as Submitted Requests (Amount), Requests</td>
</tr>
</tbody>
</table>
Channel Sales Manager Infolet Page: Explained

You can tailor the Sales Infolets page for Channel Sales Managers. First, you must enable the Sales Infolets page and add infolets to it. Then, Channel Sales Managers can use this page to get a quick snapshot of opportunities and team performance, and see where they need to focus for best results.

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

Channel Sales Manager Infolets and Detailed Reports

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

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

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

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

Enabling Analytics Tabs in the MDF Work Area: Explained

Three analytics tabs are provided for Channel Sales Managers in the Oracle Partner Relationship Management’s Marketing Development Funds (MDF) work area, along the side of the page on the landing page. However, these three tabs are not automatically exposed to your users. Before Channel Sales Managers can see these tabs, you must first enable them.
Display the MDF Analytics Subtabs
To expose a tab on an object’s landing page, or on the Analytics work area itself:

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

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

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

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

Before you can add content using Page Composer, you must have the Customize Sales UI functional security policy.

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

Adding MDF Reports to the Analytics Work Area: Explained
Business intelligence is available to view on the Analytics work area, but your Channel Sales Managers, Channel Account Managers, and budget owners will have to search for this content themselves to view it. For example, Oracle Partner Relationship Management delivers Marketing Development Fund (MDF) reports, but your users must first manually search for these reports on the Analytics work area before they can view them.

About the Marketing Development Fund Reports
Two MDF reports are available to your users:

- MDF Summary
  For Channel Account Managers and Channel Sales Managers
- MDF Budget Summary
  For budget owners

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

1. Your users should first click the Analytics icon under the Sales cluster.
2. Then, they can search for and select the report.
   This report will remain in the work area for the duration of the user's session.
3. Optionally, mark the report as a favorite. Reports that are marked as favorites always appear on the Analytics work area.
10 Expanding Your Channel Sales Capabilities

Creating Custom Workflows for Channel Sales

Creating a Custom Workflow for Channel Sales: Procedure

You can create a custom approval workflow so that all partner opportunities can be registered and submitted for approval by channel managers, to avoid channel conflict. You can use the registration status of an opportunity to keep track of where the partner opportunity is in the overall registration process.

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

Use the following procedure.

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

```java
def secCtx = adf.context.getSecurityContext()
if (secCtx.isUserInRole("ZPM_PARTNER_SALES_MANAGER_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_SALES_REPRESENTATIVE_JOB") ||
    secCtx.isUserInRole("ZPM_PARTNER_ADMINISTRATOR_JOB"))
    {if (isAttributeChanged('RegistrationStatus') && RegistrationStatus=='OPTY_SUBMITTED') return true;}
```

Click OK to save your changes.

In the Create Object Workflow page, in the Actions region, click the Create icon for E-mail Notification.

In the Create Action: E-Mail Notification page, type a name for your notification.

In the Create Action: E-Mail Notification page, in the E-Mail Details region, select the template you created at the beginning of this procedure.

In the Create E-Mail Template page:
- Enter a name for the e-mail template.
- In the E-Mail Subject region, select the Name field from the Select Fields list of values and click Insert. This populates [$Name$] into the subject line. Add "submitted for approval" after the [$Name$] syntax.
- In the E-Mail Body region, select the Name field from the Select Fields list of values and click Insert. This populates [$Name$] into the body. Add "submitted for approval" after the [$Name$] syntax.
- Click Save and Close.

Back in the Create Action: E-Mail Notification page: Under Recipient Type, select Specific users to retrieve the Add More Recipients page. Remove the following: Manager of Owner, Opty Team Member - Function: Channel Manager.

Click OK.

Save changes in the Create Action: E-Mail Notification page.

In the Create Object Workflow page, in the Actions region click the create icon for Business Process Flow.

In the Create Action: Business Process Flow page:
- Enter a name for the flow.
- Click the search icon next to the Project Name field. Search for and select the project ExtnBusinessProcessComposite.
- Under Inputs, provide the following within single quotes:
  - Approver: provide the ID of the Channel Sales Manager
  - Held EntityStatus field: provide the registration status
  - E-mail Address: provide the e-mail address for the partner user to receive notification once it is approved or rejected.
- Click Save and Close.

To verify that the approval workflow has been configured correctly, sign in to the Partners UI with your partner user credentials and edit an opportunity.

Create and update the opportunity partner registration status to Submit.

Click Save and Close.

Search for the same opportunity to refresh. Verify you receive an e-mail notification.

Sign out. Sign back in with your Channel Sales Manager credentials. You see the opportunity waiting for approval in the work list area of your dashboard.

Select the opportunity and click Approve or click Reject.

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

Configuring Approval Workflow for Deal Registration: Procedure

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

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

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

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

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

```groovy
    def secCtx = adf.context.getSecurityContext()
    if (secCtx.isUserInRole("ZPM_PARTNER_SALES_MANAGER_JOB") ||
        secCtx.isUserInRole("ZPM_PARTNER_SALES_REPRESENTATIVE_JOB") ||
        secCtx.isUserInRole("ZPM_PARTNER_ADMINISTRATOR_JOB"))
          {if (isAttributeChanged('RegistrationStatus') && RegistrationStatus=='DEAL_SUBMITTED') return true;
          }
```
14. Click OK to save the changes.
15. In the Create Object Workflow page, in the Actions region click the create icon for Business Process Flow.
16. In the Create Action: Business Process Flow page:
   - Enter a name for the flow.
   - Click the search icon next to the Project Name field. Search for and select the new project you created.
   - Under Inputs, provide the following within single quotes:
     - Approver: Channel Sales Manager ID
     - Held EntityStatus field: Registration status
     - E-mail Address: Partner user e-mail address to receive notification once it is approved or rejected.

17. Save your changes.

Configuring Notifications for Deal Registration: Procedure

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

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

Subject line: <Action><Object type><Object name/id><(Main Value)><for value if ‘from’ is different from ‘for’>"Approve Deal Registration <Deal Reg Num> from <Partner Name> for <Account Name>, (<Deal Size with currency>)"

Body: "<Submitted By> from partner <Partner Name> has submitted a deal registration for your approval.

Account: <Account Name>

Deal Size: <Deal size with currency>"

Sales administrators or implementation consultants can use Object Workflow to customize the email notification template by changing the text and fields included in Subject line and email body. They can also include or remove deep links to Oracle Sales Cloud in the email body.

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

1. Sign in with your sales administrator or implementation consultant credentials.
2. From Navigator, click Tools, Application Composer and select Sales as the Application.
4. Select the new business process you created for deal registrations.
5. Under the Common setup region in the tree, click Object Workflows.
6. Click the Create icon.
7. In the Create Object Workflow page, in the Actions region, click the Create icon under E-mail Notification.
8. In the Create Action: E-Mail Notification page, enter a name for the notification.
9. In the Create Action: E-Mail Notification page, in the E-Mail Details region, next to the E-Mail Template field, click the create icon to create a new e-mail template.
10. In the Create E-Mail Template page:
    - Enter a name for the e-mail template.
    - In the E-Mail Subject region, select the Name field from the Select Fields list of values and click Insert. This populates [S$Name$] into the subject line. Add "submitted for approval" after the [S$Name$] syntax.
    - In the E-Mail Body region, select the Name field from the Select Fields list of values and click Insert. This populates [S$Name$] into the body. Add "submitted for approval" after the [S$Name$] syntax.
11. Back in the Create Action: E-Mail Notification page: Under Recipient Type, select **Specific users** to retrieve the Add More Recipients page. Remove the following: Manager of Owner, Deal Reg. Team Member - Function: Channel Manager.

12. Click **OK**.

13. Save your changes in the Create Action: E-Mail Notification page.

### Configuring Partner Programs

### Managing Partner Programs for Channel Managers: Overview

Partner programs represent relationships between you, the brand owner or channel company, and different types of qualified partners, such as resellers, systems integrators, and distributors. You can make partner programs global or specific to a country, and you can choose to utilize 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 should also provide consistency across the globe, and align partners with the correct programs. Finally, appropriate benefits - whether financial, sales, marketing, technical, training, or other types of resources - should 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 Oracle Sales Cloud 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 easily promote or demote partners, as needed. You can quickly and easily 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.

### Creating 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 are creating.
4. From the **Type** list, select the type of program you are creating, such as Technology Partner, Reseller, or Distributor. This is the type of partner you are targeting with the program.
5. From the **Owner** list, select the owner of the program you are 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.

Creating 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.

Adding Tiers to a Partner Program

Use these steps to add tiers to a partner program.

ё 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.

Deleting Tiers

Use these steps to delete tiers.

ё Note: You can only delete a tier after it’s 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.

Creating 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.

### Adding 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.

### Deleting Benefits

Use these steps to delete benefits.

**Note:** You can only delete a benefit after it’s 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.

### Configuring Tiers for Partner Programs: Explained

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.

### Exposing 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.
Replicating Your Current Partner Levels With Tiers
Channel operation managers can use the Tiers functionality to recreate your partner levels.

Hiding 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.

Configuring Partner Program Enrollments

Partner Program Enrollment: Overview
If the channel organization offers partner programs, a partner can enroll into a partner program and receive the benefits associated with that program. From the Partner Home Page, partners can select the product catalog, review the various partner programs within the catalog, and begin the enrollment process.

The process of enrolling into a partner program involves the following:

1. Select the partner program from a program catalog listed on the Partner Home Page.
2. Confirm basic information like the organization, language, and so on.
3. Select a start date for the enrollment.

**Note:** The start date cannot 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
- Agreement Acceptance: Critical Choices
- Partner Program Enrollment Questionnaires: How They Work

Partner Program Enrollment Statuses: Explained
A partner program enrollment goes through many statuses during its lifecycle.

It can have any of the following statuses:

- Approved
- Expired
- Renewed
• Rejected
• Terminated
• Pending Approval

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.

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 has not yet been approved.

Managing Partner Program Enrollments: Overview
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 account 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 account managers perform with enrollments are grouped together on the Actions menu.

Configuring Partner Business Plans and Objectives
Configuring Partner Business Plans and Objectives for Channel Sales: Points to Consider

Before configuring your partner business plans, you must decide if you want marketing development fund requests to be visible from the Business Plan interface. You must also decide whether a user can choose a Business Plan in the Activities interface when an activity is created outside the context of a specific Business Plan.

Partner Business Plan Decision Points

The following table provides a list of the decision points and the impact of each decision.

<table>
<thead>
<tr>
<th>Decision</th>
<th>Potential Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Should MDF Requests be visible in the Partner Business Plan interface?</td>
<td>If yes, you can use Oracle Application Composer to create a relationship between the business plan and the MDF request, and you can add a new tab MDF Request tab to the Business Plan object.</td>
</tr>
<tr>
<td>Should users be able to select a partner business plan when creating or updating an activity that is outside the context of the specific partner business plan?</td>
<td>If yes, then you must use Oracle Application Composer to expose the standard Business Plan field on the Activities page.</td>
</tr>
</tbody>
</table>

Business Plan and Objective Setup Tasks

Use the following tasks for business plan and objective setup:

1. Manage Standard Lookups
   a. Lookup name: Business Plan Type
      • Lookup code: ORA_ZCA_BUS_PLAN_TYPE
   b. Lookup name: Business Plan Status
      • Lookup code: ORA_ZCA_BUS_PLAN_STATUS
   c. Lookup name: Business Plan Team Member Function
      • Lookup code: ORA_ZCA_BUS_PLAN_TEAM_FUNC

2. Manage Objective Types

Managing Partner Business Plans: Overview

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 should reach within the first quarter for a specific product line in a specific geographical region.

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

Manually Creating 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.

Creating 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.
Monitoring 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.

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.

Configuring Marketing Development Funds (MDF)

Marketing Development Funds (MDF): Overview

Brand owners understand that using partners to extend 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 allows 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 a 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 a 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.

Marketing Development Fund (MDF) Objects: How They Work Together

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

- MDF Budgets, allows brand owners to create and manage MDF budgets that can be used by eligible partners.
- MDF Requests, allows partner users to request funds to implement strategic marketing activities.
- MDF Claims, allows partner users to submit claims seeking reimbursement for the marketing expense incurred.
- MDF Claim Settlements, allows partner users to track their claim payment progress and allows 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 can be used by a specific partner or by a group of partners in one or more countries. Each MDF budget:

- has a start and an end date.
- has a request deadline, which is the last day partners have to submit requests against the budget.
- has a claims deadline, which is the last day to submit claims against the approved requests on the budget.
- allows channel managers to specify the type of marketing activities the budget can be used for, 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 to the budget.
- View and manage approved or rejected claims associated to the budget.
- Track the funds available in the budget.
- Add notes about the budget.

Note: An active budget can be inactivated at any time by any team member of the budget team with the appropriate access.

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 allows 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, the submitter of the request is notified via e-mail and system notifications. Partner users on the request team with edit or full access can re-submit returned or withdrawn requests.
If the partner owner approves the request, e-mail 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, partner users with the right access can re-submit the request. A MDF request must have an associated MDF budget for the approval to be successful. Anyone designated as an approver can associate a budget to the MDF request. When the channel operations manager approves the request, the request status changes to Approved and the partner can begin the marketing activity.

**Note:** Rejected requests cannot be re-submitted.

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.
- Allow other partner and channel users to view or manage the request.
- View MDF claims on the request if they are 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.
- Allow other members of the partner company to view or edit the request.
- View MDF claims on approved requests.

**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 via e-mail and system notifications. Partners can re-submit 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 are managed by channel users.

Partner users can view all claim settlements associated to an approved MDF claim on the Claim Settlements tab.
Implementing MDF for Channel Sales: Critical Choices

Oracle Sales Cloud MDF is optimized for partner users. To optimize the user experience for channel managers, you must customize the relevant fields and pages for the relevant roles through Extensibility, with Oracle Application Composer and Oracle Page Composer. Activity management pages are optimized for direct sales. You must customize the activities pages to expose MDF attributes for customers offering MDF programs to their partners.

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

- Approval routing rules
- Approval process flows

MDF Requests and MDF Claims Approval Routing Rules

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

By default, Oracle Sales Cloud provides commonly needed approval routing rules for MDF requests and MDF claims, however you can create your own approval workflow to route MDF requests and MDF claims to the correct approvers.

MDF Request and MDF Claim Approval Process Flows

The default MDF approval processes should meet most MDF request and MDF claim use cases. However, if you need to customize one or both flows, you can do so by customizing the human task flows included in Oracle Sales Cloud, using the existing business flows as your templates. The templates are: FundRequestApprovalHumanTask for MDF requests and ClaimApprovalHumanTask for MDF claims.

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

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

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

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

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

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

Configuring Profile Options and Lookups for MDF: Procedure

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

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

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

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

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

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

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

Setting the Profile Option Level

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

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

Configuring Your Preferred Currency

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

1. Sign in with your Sales Administrator credentials.
2. In the Navigator, click Setup and Maintenance.
3. Search for and select the Manage Administrator Profile Values task.
4. On the Manage Administrator Profile Values task page, search for and set the following profile option codes:

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>FND_CURRENCY</td>
<td>User Preferred Currency</td>
</tr>
</tbody>
</table>

5. Save your changes.

Configuring Lookups for MDF Objects

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

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

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

<table>
<thead>
<tr>
<th>Lookups to Configure</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORA_MKT_MDFREQUEST_FUNC</td>
<td>Indicates the business role the team member plays on the MDF Request.</td>
</tr>
<tr>
<td>MKT_MDF_FUNDEQ_STATUS</td>
<td>Indicates the approval status for the MDF request.</td>
</tr>
<tr>
<td>ORA_MKT_MDF_CLAIM_RECORD_SET</td>
<td>Indicates the record set used to search for MDF claims.</td>
</tr>
<tr>
<td>ORA_MKT_MDF_ACCESS_LVL</td>
<td>Indicates the access level of a team member to the MDF Claim.</td>
</tr>
<tr>
<td>ORA_MKT_MDFREQUEST_FUNC</td>
<td>Indicates the business role the team member plays on the MDF Request.</td>
</tr>
<tr>
<td>MKT_MDF_CLAIM_STLMNT_TYPE</td>
<td>Indicates how the claim was financially settled.</td>
</tr>
<tr>
<td>ORA_MKT_MDFCLAIMSETT_TRANS</td>
<td>Indicates the type of method used to settle the transaction.</td>
</tr>
<tr>
<td>MKT_MDF_CLAIM_STLMNT_STATUS</td>
<td>Indicates whether the data for a claim settlement is complete.</td>
</tr>
</tbody>
</table>

5. Save your changes.

### Configuring Oracle Social Network for Channel Sales

#### Enabling Oracle Social Network for Partner Collaboration: Explained

With Oracle Social Network enabled, channel organizations and partners can use the social network to collaborate. Channel organizations can invite their partners to Conversations in Oracle Sales Cloud.

If you have the Oracle Social Network Service Administrator role, use these steps to enable Oracle Social Network for partner users.

1. Sign in to the Oracle Social Network with your Oracle Social Network Administrator credentials.
2. Click Administration.
4. In the Outside Users region, update the Outside Users Whitelist with the email domains for the partners you want to collaborate with.
5. Click Save.

Channel account managers can now invite partners to participate in Conversations.
11 Additional Learning Resources

Oracle Sales Cloud Additional Resources

This topic lists additional documentation, training, and other available resources.

Go to the following locations to find more information:

- Documentation, including videos and tutorials, is available at http://docs.oracle.com/cloud/latest/salescs_gs/index.html. Or navigate from cloud.oracle.com to Resources - Getting Started: Documentation - Oracle Cloud Application Services: Sales.


Community

The Oracle Applications Customer Connect (https://appsconnect.custhelp.com) offers a place where you can connect with experts from Oracle, our partner community, and other users. Become part of this community to post tips, get answers to your questions, and find valuable information from the people using the application.

Training

Courses are available through Oracle University. You can find a full list of available courses at http://education.oracle.com/fusionapps. The following courses are recommended:

- Oracle Sales Cloud Implementation
- Oracle Sales Cloud Extensibility

Documentation

Solutions and documentation are available in the help and in guides. The following guides are recommended:

- Getting Started with Oracle Sales Cloud Customizations
- Oracle Sales Cloud Using Sales
- Oracle Sales Cloud Implementing Sales
- Oracle Sales Cloud Using Campaigns
- Oracle Sales Cloud Using Leads
- Oracle Sales Cloud Implementing Marketing
- Oracle Sales Cloud Using Marketing Segmentation
- Oracle Sales Cloud Using Customer Data Management
- Oracle Sales Cloud Customer Data Management Implementation Guide
• Oracle Sales Cloud Customizing Sales

These guides are available from http://docs.oracle.com.

Support Articles

Go to My Oracle Support at https://support.oracle.com for the latest implementation articles.
Glossary

**partner**
An independent corporation that works with one or many channel organizations. A partner engages with a channel organization in many ways, such as: sales, service, influence, support, and so on.

**partner program**
Channel organizations define partner programs to segment partners and provide benefits based on partner competencies and expected revenue from partners. Programs have an eligibility criteria and associated benefits.