Oracle Sales Cloud
Using Partner Relationship Management for Channel Managers

Release 13 (update 18C)
## Oracle Sales Cloud

Using Partner Relationship Management for Channel Managers

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Preface

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

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos:** Go to the Oracle Help Center to find guides and videos.

- **Training:** Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
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<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
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Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website. Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

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

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

Audience and Scope

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

This guide describes how channel managers can manage:

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

Related Guides

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

The following table provides a list of related guides that can help you use partner relationship management features and functionality. This table also provides a description for each guide listed.

<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 using a case study to describe concepts and procedures.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Describes the tasks that you perform to use Sales.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to use tools to modify and configure your applications.</td>
</tr>
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</table>
Related Topics

- Oracle Help Center
2 Understanding Partner Relationship Management

Partner Relationship Management: Overview

Channel organizations can use partner relationship management functionality to recruit channel partners and sell products and services through them to grow their business. Both channel organizations and partners use partner management to align their businesses so they can more successfully close deals. Channel organizations also use partner management to analyze partner performance, thus optimizing their time and financial investments in their partners.

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

How Partner Relationship Management Is Organized

Partner relationship management functionality is organized in the following areas:

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

Partners

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

- Partner profile information
- Partner contacts
- Partner teams
- Partner leads
- Partner deal registrations
- Partner opportunities
- Partner relationships
• Partner business plans and objectives
• Partner programs
• Partner program enrollments
• MDF
• Partner notes
• Partner activities
• Partner assessments
• Partner collaboration

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

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

Programs

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

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

Enrollments

A partner program enrollment is the enrollment of a partner in a specific partner program. Active enrollment in partner programs can make partners eligible for benefits and incentives that come with the partner program. Enrollments allow the channel team to track and manage which partner users are taking part in the partner programs offered by the channel organization.

Marketing Development Funds

Market Development Funds (MDF) are funds that the channel organization makes available to their partners, so the partners can market the channel organization’s products in specific geographical areas, or so the partners can market the channel organization’s brand in general. MDF enables channel organizations to manage the full cycle associated to marketing development funds, from creating and managing MDF budgets to managing MDF requests and claims submitted by partners.
Deal Registrations

Deal registration is the process partners use to request exclusive rights to a deal from the channel organization and get an incentive for doing so. This process provides partners with the means to inform the channel organization about a deal, and by being first to register that deal, the partners receive priority for the opportunity if their deal registration is approved. Deal registrations are less speculative than leads, but more speculative than opportunities. The full deal registration life cycle is supported. Partner users (or channel users on behalf of a partner) can convert leads to a deal registrations, and deal registrations to opportunities.

Partner Announcements

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

Sales Infolets

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

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

Managing Attachments for Partner Objects: Explained

An attachment is a file or URL that is related to an object such as a partner account. Attachments are used to upload, download, and store content or to provide supplementary information for specific business objects. Users can view, create, update, and delete attachments depending on their job role and security privileges.

Types of Attachments

The types of attachments are:

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

The following partner objects support attachments:

- Business Plans
- Business Plan Objectives
- Deal Registrations
- MDF Budgets
- MDF Claims
- MDF Claim Settlements
- MDF Requests
- Partners (Profile)
- Partner Contacts
- Partner Programs
- Program Enrollments

Creating Notes for Channel Sales Objects: Procedure

Channel managers and partner users can create notes on channel sales business objects to document and convey important information regarding the object. They can save these notes for future reference or to provide details to other users. They can use notes in several scenarios, such as providing the reason for any changes made to the channel sales business object, and to record decisions and assumptions that led to those changes.

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

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

Creating a Note

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

1. Sign in with your channel manager or partner credentials.
2. From your home page, navigate to the channel sales business object you want to create a note on.
3. Select the specific record you want to create a note on. For example, select the specific partner account, or the specific lead.
4. Click the Notes subtab for the selected channel sales business object.
5. On the Notes page, click Create Note.
6. From the Type field, select the type of note you’re creating. Default values are General, Reference, and Special.

7. Select the Private option if the note is for yourself only.

8. Use the note toolbars to format the text for your note.

9. In the note body, type your note.

10. Click Save and Close to save your note.

Audit Trail for Partner Objects: Overview

Audit trail provides a history of the changes made to data. Partner is one of the business objects that supports audit trail. Audit trail includes information such as who has accessed an item, what operation was performed on it, when it was performed, and how the value was changed.

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

The following partner objects support audit trail:

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

Understanding the Sales Infolets Page: Overview

The Sales Infolets page on the springboard give channel managers an overview of how their partner sales representatives are doing in meeting their quotas, how the partners are moving deals through the pipeline, and areas where these partner sales representatives must focus their attention to achieve the best results. Each infolet provides key data about a specific area, for example, the revenue from your top open opportunities, what opportunities aren’t progressing, and other business transactions. This information keeps channel managers up to date on the sales progress of their partners.

Infolets on the Sales Infolets Page

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

<table>
<thead>
<tr>
<th>Infolet Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual versus Quota (quarterly sales)</td>
<td>The Actual vs Quota infolet provides channel managers with information about the partner’s revenue goal for that quarter, the revenue the partner won for that quarter, and what the difference is between the two.</td>
</tr>
<tr>
<td>Top Opportunities</td>
<td>The Top Opportunities infolet provides channel managers with revenue information about the top open opportunities (opportunities that have a win percentage greater than 70) for that quarter, and the number of opportunities that have a win percentage greater than 70 for that quarter.</td>
</tr>
<tr>
<td>Infolet Name</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Stalled Opportunities</td>
<td>The Stalled Opportunities infolet provides channel managers with information about the total revenue from open opportunities that have been in the same stage for longer than the expected time period, and the number of open opportunities that have been in the same stage for longer than the expected time period.</td>
</tr>
<tr>
<td>Open Pipeline</td>
<td>The Open Pipeline infolet provides channel managers with information about the total revenue amount of potential sales from all open opportunities for the current and next quarter, and the number of open opportunities in process for the current and next quarter.</td>
</tr>
<tr>
<td>Partner Status</td>
<td>The Partner Status infolet provides channel managers with detailed information about the partner, including the number of partners currently awaiting activation (partners in either Prospective or Registered status).</td>
</tr>
<tr>
<td>Partner Performance</td>
<td>The Partner Performance infolet provides channel managers with detailed information about the top performing partner, including the partner name and revenue amount.</td>
</tr>
</tbody>
</table>
3 Managing Partners

Managing Partners: Overview

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

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

Creating a Partner Saved Search Based on the Current User: Procedure

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

Creating a Saved Search

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

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

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

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

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

5. Click Partner Management and Partners.

6. On the Partners page, click Show Advanced Search.

7. Click Add, and select Created By or Last Updated By.

8. In the Created By or Last Updated By search field, select Current User.

9. Click Save.

10. In the Create Saved Search dialog box, type a name for the new saved search, for example, Partners I Created or Partners I Last Updated.

11. (Optional) Select the Set as Default check box to make this search the one that loads when a user first displays the page.

12. (Optional) Select the Run Automatically check box to run the search automatically when this search is loaded.

13. Click OK.

14. To close Page Composer, click Close.

15. Test your new saved search.

16. Publish your sandbox to make the saved search available.

Reviewing Partner Overview Information: Explained

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

<table>
<thead>
<tr>
<th>Partner Object</th>
<th>Information Channel Managers Can View</th>
</tr>
</thead>
</table>
| Key Partner Profile Details | • Type  
• Status  
• URL  
• Address  
• Primary Contact  
• Owner  
• Contacts |
| Deals                    | • Open Leads  
• Pending Deal Registrations  
• Open Opportunities |
| Enrollments              | • Active Enrollments  
• Enrollments Pending Approval |
| Open Activities          | All |
| Open Service Requests    | All |

Viewing the Partner Overview Page

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

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

Creating New Partner Accounts: Procedure

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

Creating a New Partner Account

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

1. Sign in with your channel manager credentials.
2. From the landing page, click Partner Management, and click Partners.
3. Click Create Partner.
4. Provide the following information for the partner:

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>What to Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Type a unique name for the partner account you’re creating.</td>
</tr>
</tbody>
</table>
| Type       | Select the type of partner account you’re creating. Default values are:
|            | o Business process owner
|            | o Certification and compliance provider
|            | o Education services provider
|            | o Independent software supplier
|            | o Original equipment manufacturer
|            | o Re-seller
|            | o Support services provider
|            | o Systems integrator
<p>|            | o Value added distributor |
| Level      | If you have enabled levels, select the level for the partner account. Default values are Gold, Platinum, Premier, Silver, and Strategic. |
| Status     | If you want to make the new partner account active, select Active. Otherwise, select Prospective or Registered. The partner account must have a primary contact before you can save the partner as Active. |</p>
<table>
<thead>
<tr>
<th>Field Name</th>
<th>What to Type or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>Select the country where the partner account is located.</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>Type the street address of the partner account.</td>
</tr>
<tr>
<td>City</td>
<td>Type the city where the partner account is located.</td>
</tr>
<tr>
<td>State</td>
<td>Type the state where the partner account is located.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Type the postal code for the partner account.</td>
</tr>
</tbody>
</table>

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

6. Provide the following information for the primary contact:

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>What to Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Type the first name of the primary contact.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Type the last name of the primary contact.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Type the job title of the primary contact.</td>
</tr>
<tr>
<td>Email</td>
<td>Type the email address for the primary contact.</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

**Editing Partner Information: Procedure**

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

**Editing Partner Information**

Use the following steps to edit partner information:

1. Sign in with your channel account manager credentials, and click **Partners**.
2. From your list of partners, search for and select the partner with information you want to edit.
3. Click the partner’s **Profile** tab.
4. Update the information for the partner.
Managing Partner Announcements: Overview

Announcements are an effective means of providing your partners with important information. If you have sales administrator or channel operations manager credentials, you can use the Partner Announcements page to manage the announcements you want your partners to see on their home page when they sign into the channel organizations applications.

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

Creating a New Partner Announcement

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

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

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

4. Click **Create Announcement** to create the partner announcement.
5. On the Create Announcement page, provide the following required information:
   - Subject: what the announcement is about in a couple words
   - Start Date: you can send future announcements by selecting the appropriate date.
   - End Date: you can set a date for the announcement to end.
   - Content: you can add plain text, html, an embedded icon, image, video, or hyperlink.

6. You can click **Save and Close** to save the announcement and it will be sent to all partners when activated.
7. If you want to send the announcement to one or more specific partners, select one of the following Audience options:
   - Select Partners by Attributes: you specify partners based on partner country, partner type, or partner level.
   - Select Specific Partners: click Add Partner and select at least one partner from your list of partners.

8. Click **Save and Close** to send the announcement out to the specified partner or partners.

   When the date indicated as the start date for the partner announcement occurs, the announcement appears to partners on their home page and remains there until the specified end date or until you specify and end date.

Deactivating a Partner Announcement

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

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

### Impersonating a Partner User: Explained

Partner impersonation enables channel managers to see the UI pages and data exactly as the partner user sees them. Partner impersonation is helpful for troubleshooting user complaints about the UI pages or data. Channel managers do not need the partner user’s specific permission to impersonate the partner user.

### Impersonating a Partner User

Channel managers can use these steps to impersonate a partner user.

1. Sign in with your Channel Account Manager credentials.
2. On your springboard, click **Partner Management**.
3. Click **Partners**.
4. Search for and select the partner account where the partner user works.
5. On the Partner Contacts subtab, search for and select the partner user you want to impersonate.
6. On the Edit Partner Contact page, click **Manage User Details**.
7. In the User Account region of the Manage User Details page, click **Login as User** and provide your channel manager credentials.
8. You can update the following:
   - Accounts
   - Contacts
   - Leads
   - Deal Registrations
   - Opportunities
   - Activities

**Note**: An audit record tracks all changes made by the channel manager while impersonating the partner user, including the user name of the impersonator and changes made during the impersonation.

### Modifying Your Personal Information: Overview

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

- Access their personal profile.
- View and edit their profile information, such as email address, password, and some personal preferences.
What Prospective Partners Can Do
Prospective partners can view and edit their personal information, view and edit their opt-in setting, reset or change their password and change their security questions and answers. They can update personal information like name, title, country, and so on.

FAQs About Partners

What's a partner profile?
A partner profile contains partner-specific information, like company phones, fax, website, address, industry, geography coverage, partner company description, company number, industries served, and so on. Each channel organization has a different set of partner profile information that it would like to capture, for example, number of sales employees, tax ID, certifications, opportunities closed last year information, and so on.

How is partner profile information gathered?
Channel managers can enter partner profile information. The profile information helps channel managers understand and differentiate their partners to provide appropriate sales support and incentives to maximize channel sales.
Some partner profile information can also be derived from partner sales transactions, for example, closed partner opportunities revenue last year or partner data stored in external sources. Partner users and partner administrators can update some partner profile information.

What partners does selecting My Partners display?
When you select the My Partners list in the Partners work area, the application displays a list of all of the partners where you're listed as the partner owner. You're automatically the partner owner if you created the partner or an application administrator can designate you as the owner.

What partner records do the different record sets permit you to search?
The different record sets provided in the Saved Searches window restrict your saved searches to different sets of partners. The following table lists and describes the record sets for partners.

Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records where you are on the team. Or, restrict your searches to a smaller geographical area. For example, search all the partners in one state instead of the whole country.
### Why can't I see some partner profile attribute values when I create a partner?

The synchronization job updates the data from Lookups to BI and then from BI into the territory dimension tables, so you must run the territory dimension synchronization process to include new lookup values. The partner profile attributes listed in the following table require you to run the territory dimension synchronization process before you can see their existing or changed values in the UI.

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

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Task Name</th>
<th>Profile Option or Lookup Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Geographies Served</td>
<td>Manage Territory Geographies - the geography structure used by Territory Manager.</td>
<td>N/A</td>
</tr>
<tr>
<td>Partner Industries Served</td>
<td>Manage Profile Options</td>
<td>MOT_INDUSTRY_CLASS_CATEGORY - contains the classification category used for Industries Served dimension.</td>
</tr>
<tr>
<td>Partner Focus Areas</td>
<td>Define Sales Catalog - Manage Product Groups</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Managing Partner Contacts

Managing Partner Contacts: Overview

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

Types of Partner Contacts

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

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

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

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

Channel account managers can add existing account contacts to a partner as partner contacts, so they don’t create multiple records for the same contact person. To add account contacts as partner contacts, the partner must also be an account.
When channel account managers delete partner contacts with user accounts, those user accounts are deactivated so the partner contacts can no longer sign into the partner portal.

Creating New Partner Contacts: Procedure

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

Creating a New Partner Contact

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

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

Adding Existing Account Contacts as Partner Contacts: Procedure

Channel account managers can add existing account contacts as partner contacts.

> **Note:** Account contacts can be added as partner contacts only if the partner is also an account that you sell to. The Add Contacts button will not appear unless this is the case.

Adding an Existing Contact as a Partner Contact

Use these steps to add an existing account contact as a partner contact for a partner.

1. Sign in with your channel account manager credentials.
2. Click Partners, and from your list of partners, search for and select the partner.
3. Click the partner’s Partner Contacts tab.
4. Click Add Contacts.
5. On the Add Contacts page, search for and select the contact you want to add as a partner contact.
6. Click OK, and click Save and Close.
Editing Partner Contacts: Procedure

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

Editing a Partner Contact

Use these steps to edit information about a partner contact.

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

Editing Partner Contact User Information: Procedure

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

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

Editing User Information About a Partner Contact

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

1. Sign in with your channel manager credentials.
2. Click Partners and from your list of partners, select the partner.
3. Click the Partner Contacts tab, and search for and select the partner contact you want to edit.
4. Click the contact’s Profile tab.
5. Click the Manage User Details link.
6. On the Manage User Details page, you can edit the partner contact’s role and manager.
   - If you want to create a user account for the partner contact, click the Create User Account check box.
   - If the partner contact is already a user and you want to deactivate the user account, click the Deactivate User Account link.
7. Click OK, and click Save and Close.
Editing the Partner Contact Hierarchy: Explained

Channel managers with edit access to partner accounts and partner contacts can edit their partner’s contact hierarchy, including making management changes and changing the current root or top resource in their partner’s contact hierarchy. Partner administrators with the ability to perform delegated user administration, such as accessing the Partners information in the channel organization’s Oracle Cloud applications, can also make these changes for their company’s contact hierarchy.

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

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

1. Sign in with your channel manager or partner administrator credentials.
2. Navigate to the Partner Contact UI.
   - Channel Managers:
     a. From the home page, click Partner Management.
     b. Click Partners.
     c. From your list of partners, select the partner account the contact belongs to.
     d. Click the Partner Contacts subtab.
   - Partner Administrators:
     a. From the home page, click Partner Management.
     b. Click Partners.
     c. On the Partner Profile page, click Edit.
     d. Click the Partner Contacts subtab.
3. Click the name of the contact whose hierarchy information you want to update.
4. On the Edit Contact page, click the Manage User Details link.
5. On the Manage User Details page, you can update the following:

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

<table>
<thead>
<tr>
<th>Field, Option, or Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>Select a role for this contact in the partner company. Default values are Partner Administrator, Partner Sales Manager, and Partner Salesperson.</td>
</tr>
<tr>
<td>Manager</td>
<td>Select a manager in the partner company for this contact.</td>
</tr>
<tr>
<td>Head of Hierarchy</td>
<td>Select this check box if you want this contact to be the root or top resource in the partner company’s contact hierarchy. The Head of Hierarchy check box is only active if you have selected Partner Administrator or Partner Sales Manager, or a customer-defined resource role that is set up as a Manager role, for the contact.</td>
</tr>
<tr>
<td>Create User Account</td>
<td>Select this check box to create a user account for this contact.</td>
</tr>
</tbody>
</table>
### Field, Option, or Button | Description
--- | ---
Sign In as User | Click this button to sign in as this contact.
Deactivate User Account | Click this button to deactivate this contact as a user. For example, if the user leaves the partner company.

6. Click **OK**, then click **Save and Close** to save your changes.
5 Managing Partner Teams

Creating Teams for Partners: Procedure

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

Creating Teams

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

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

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

5. Click Add Team Member.
6. Search for and select the resource you want to add to the team.
7. Click OK to add the resource to the team.
8. On the Edit page, you can provide more information about the resource, such as:
   - Access: Select the level of access you want the resource to have for the business object. Default values are View, Edit, and Full.
   - Function: Select the role that the resource has in the company, such as channel account manager.
9. Click Save and Close to save your changes.
Creating MDF Teams

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

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

Assigning Territories to Partners with Batch Assignment: Worked Example

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

Assigning Territories to Partners With Batch Assignment

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

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>Bind Variable Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnersOfAStatus</td>
<td>BindStatus= ACTIVE</td>
</tr>
<tr>
<td>PartnersNeedingReassignmentWithStatus</td>
<td>BindStatus= EXPIRED</td>
</tr>
<tr>
<td>PartnersCreatedInLastNDays</td>
<td>BindNumberOfDays= 1</td>
</tr>
<tr>
<td>PartnersUpdatedInLastNDays</td>
<td>BindNumberOfDays= 2</td>
</tr>
<tr>
<td>PartnersNeedingReassignment</td>
<td>No value required (leave empty)</td>
</tr>
</tbody>
</table>
Chapter 5
Managing Partner Teams

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>Bind Variable Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnersImportedInABatch</td>
<td>BindImportBatchId= 11001</td>
</tr>
<tr>
<td>PartnersImportedInABatchNeedingReassignment</td>
<td>BindImportBatchId= 11001</td>
</tr>
<tr>
<td>PartnersInACountry</td>
<td>BindCountryCode=</td>
</tr>
<tr>
<td></td>
<td>For example, the BindCountryCode for the United States is US.</td>
</tr>
<tr>
<td>PartnersBelongingToAnIndustry</td>
<td>BindIndustryBelongedTo= 1000</td>
</tr>
<tr>
<td></td>
<td>Where 1000 is Industry Classification code.</td>
</tr>
<tr>
<td>PartnersWithAProductDim</td>
<td>BindProduct= Education</td>
</tr>
<tr>
<td>PartnersWithAGeographyDim</td>
<td>BindGeographyServed= Netherlands</td>
</tr>
<tr>
<td>PartnersWithIndustryDim</td>
<td>BindIndustryServed= Life Sciences</td>
</tr>
</tbody>
</table>

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

**Viewing a Partner's Channel Territories: Procedure**

To better understand the focus areas of a partner, channel managers must be able to see the channel territories that are assigned to a partner account. Partner Administrators can view the territories assigned to their account instantly so they can better focus their effort on deals pertaining to those territories.

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

1. Sign in with your channel manager or partner administrator credentials.
2. Click **Partner Management**, and click **Partners**.
3. From your list of partners, select the partner you want to view channel territories for.
4. On the Edit Partner page, click the **Team** subtab.
5. In the Show field on the Team page, select **Territories**.

The Team page updates to display a list of all channel sales manager territories assigned to the partner.
6. To ensure you're viewing the most recent list of assigned channel sales manager territories, you can select the **Assign Territories** action from the Actions menu.

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

Managing Partner Leads: Overview

Channel account managers can use the Leads UI pages to assign leads to the partners who are best qualified for the leads, track the progress of the lead, and convert the lead into a deal registration (if the channel organization offers deal registration) or an opportunity. The leads available to channel account managers may come from territory-based assignment, rule-based assignment, or a combination of both.

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

Channel account managers can assign partners to a lead by:

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

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

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

Assigning and Reassigning Leads to Partners: Procedure

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

Assigning Leads to Partners

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

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

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

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

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

Reviewing Leads Created by Partners: Explained

After a partner user runs assignment, channel managers who are assigned to the Channel Sales Manager territory can view the leads that the partner user created. Channel managers can also create rules to assign the leads to one or several channel users. They can review a partner created lead by opening the lead, reviewing the lead information, and choosing an action to take from the Actions menu.

Reviewing a Partner Created Lead

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

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

Converting Partner Leads to Opportunities: Explained

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

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

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

Rejecting Partner Leads: Procedure

Channel managers can use the Leads pages to reject leads. If a channel manager rejects a lead then the channel manager becomes the owner of the lead, but the partner user can still view the lead. Qualified leads become unqualified when they’re rejected. Partner users can also reject a lead assigned to them if they aren’t interested in the lead or if they already have that lead.

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

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

Deal Registrations: Overview

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

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

Partners can register deals and these submitted deal registrations are routed to channel sales managers for approval. In turn, channel sales managers can reject or return deal registration requests to partners, asking for additional information and justification. Before approving the deal, the channel sales managers can check for duplicate opportunities to avoid channel conflicts. Once a deal registration is approved, an opportunity is automatically created to track it in the pipeline. Channel managers can decide when to add a partner opportunity in the forecast.

This topic covers the following:

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

Deal Registration Process

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

Deal Registration Benefits

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

Deal Registration Roles and Associated Actions

It's helpful to know which job roles are responsible for what actions in the deal registration life cycle. When both internal and external resources are added to the equation, this knowledge becomes even more crucial.
The following table shows the job roles and the deal registration actions allowed, including the specific actions permitted for the partner job roles and the specific actions permitted for the channel job roles.

<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>If you’re the submitter of the deal registration, you can withdraw the deal registration if it’s still in pending approval status.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit a deal registration if they’re on the team with full or edit access and the deal registration is in draft, return or withdrawn status. The partner attributes on the deal registration become those of the company the partner user belongs to and these attributes can’t be changed by the partner user. However, a channel account manager or channel sales manager can pick or change the partner company when they’re creating or editing a deal registration.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>View deal registration product details if they’re 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’re 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’re 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’re 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’re a resource on the deal team and they have full access. Partner users can only add resources that belong to their own partner company.</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’re a designated approver for the deal registration. They can do a duplicate check on the deal registration, they can convert a deal registration to an opportunity, and they can access the social tab.</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’re not on the sales team or territory.</td>
</tr>
</tbody>
</table>
Managing Partner Deal Registrations: Explained

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

This topic discusses the following:

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

Channel Account Manager List Views

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

Both channel account managers and partner users can access the Deal Registrations page by clicking the Deal Registrations icon on their desktop. Both channel account managers and partner users see the same preconfigured sort for all Deal Registration lists - Submitted Date descending (oldest to newest submissions). Both see the same preconfigured Deal Registrations table column layout. Both see the same preconfigured saved search run on the Deal Registrations page.

However, channel account managers can view and edit a deal registration’s details by clicking the deal registration number on their list view, and they can also perform searches using default search attributes, including:

- Partner
- Partner Contact
- Record Set
- Deal Registration Name
- Registration Status
- Submitted Date
- Last Updated Date
- Account Name
- Contact Name
- Opportunity Name
- Deal Expiration Date
- Deal Registration Number
Approving, Rejecting, Returning, or Withdrawing a Partner Deal Registration

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

<table>
<thead>
<tr>
<th>Action Taken</th>
<th>What Happens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>If the channel account manager is the last or only approver for the deal registration, the status changes to Approved. The status remains Pending Approval if the channel account manager is not the last approved for the deal registration. If the deal registration is not already associated with an existing opportunity, the deal is converted to a new opportunity upon final approval. Conversion to an opportunity does not take place if the deal registration is associated with an opportunity, either through the Opportunity field of the deal registration, through resolving duplicate opportunities, or through the Deal Registrations tab for an opportunity.</td>
</tr>
<tr>
<td>Reject</td>
<td>From their list view, channel account managers can select one or more rows in any list that contains deal registrations pending approval and reject all of the selected deals. If a deal registration is in Pending status, channel account managers can also reject it by selecting the Reject action from the deal registration’s Edit page. Channel account managers can provide a rejection reason and comments about why the deal registration was rejected. The rejected deal registration no longer appears in lists of deal registrations in any status other than Rejected.</td>
</tr>
<tr>
<td>Return</td>
<td>From their list view, channel account managers can select one or more rows in any list that contains deal registrations pending approval and return all of the selected deals. If a deal registration is in Pending status, channel account managers can also return it by selecting the Return action from the deal registration’s Edit page. Channel account managers can provide a return reason and comments about why the deal registration was returned. The returned deal registration no longer appears in lists of deal registrations in any status other than Returned.</td>
</tr>
<tr>
<td>Withdraw</td>
<td>A channel manager can withdraw a deal registration if the channel manager submitted the deal registration on behalf of a partner. After the deal registration is withdrawn, the channel manager can resubmit it for approval.</td>
</tr>
</tbody>
</table>

Resolving Duplicate Partner Deal Registrations

On the Edit Deal Registration page, channel account managers can check for potential duplicate accounts, contacts, and opportunities before making an approval decision for a deal registration in Pending Approval or Returned status. By reducing duplicates, channel account managers can maintain clean customer data, prevent channel conflict, and accurately reward the first partner to register the deal.

When channel account managers submit multiple deal registrations for approval from their Deal Registrations list view, a check for duplicate opportunities automatically runs to minimize conflict between partners pursuing the same deals, or between partners and the channel organization’s own sales team.
Note: This automated duplication check is only for deal registrations that reference existing accounts. If duplicates are detected, the channel account manager sees a list of possible duplicate record types, followed by a table showing which one is currently used in the deal registration.

Viewing Deal Registration Approval Information and Approval History

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

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

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

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

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

Creating a Partner Deal Registration

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

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

- View and update header information
- View and update customer information, such as: account, contact, and address information
- Select a partner for the deal registration
- Specify the partner type
- View and update product information
- Save and close the deal registration
- Save and continue editing the deal registration
- Cancel the deal registration
Channel managers who are able to create deal registrations can use the Copy action on the Edit Deal Registration page to use an existing deal registration as a template when creating a new deal registration. If you have Read Only access to the deal registration, you can’t use the Copy action. Your sales administrator must first use Application Composer to expose the Copy action on the Edit Deal Registration pages before you can see it.

When you copy a deal registration:

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

The following objects aren’t copied:

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

Note: The Copy action does not appear for SOAP and REST Web Services.

To use the Copy action:

1. Sign in with your channel manager credentials.
2. Navigate to your deal registrations.
3. Search for and select the deal registration you want to use as a template for your new deal registration.
4. From the Actions menu, click Copy.
5. In the confirmation message box, click Yes.
6. The Edit Deal Registration summary page appears with a new deal registration number.
7. You can make further edits to the copied deal registration before saving it.

Editing a Partner Deal Registration

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

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

- Approve the deal registration
- Reject the deal registration
- Return the deal registration
- Save and close the deal registration
Channel account managers can edit information on the following deal registration tabs:

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

**Partner Deal Registration Expiration**

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

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

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

**Creating a Pending My Approval Saved Search for Deal Registrations: Procedure**

Channel managers can create a Pending My Approval saved search for deal registrations. This saved search shows all deal registrations that are pending approval by the signed in channel manager. This saved search differs from the All Pending Deal Registrations saved search because it doesn’t show deal registrations the signed in channel manager has access to that are pending approval by other users.

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

1. Sign in with your channel manager credentials.
2. Ensure that you’re in a sandbox.
3. From the Settings and Actions menu, click **Edit Pages**.
4. Select the option to edit pages at the **Job Role** level, select **Channel Sales Manager** or **Channel Account Manager**, and click **OK**.
5. Navigate to the Deal Registrations page.
6. On the Deal Registrations page, click **Show Advanced Search**.
7. Provide the following search criteria:
   - Record Set Equals **Records pending my approval**
   - Status Equals **Pending Approval**
   - (Required) Last Updated Date **Between** [90 days or less from today] - [today]
8. Click **Save**.
9. In the Create Saved Search dialog box, type a name for the saved search, such as Pending My Approval.
10. Select the Set as Default check box if you want to make this search the one that loads when a user with the channel manager role you specified displays the page.

11. Select the Run Automatically check box if you want to run the search automatically when this search is loaded.

12. Click OK.

13. To close Page Composer, click Close.

14. Test your new saved search.

15. Publish your sandbox to make the saved search available to channel managers.

---

Browsing the Sales Catalog from Deal Registration Pages: Explained

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

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

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

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

1. Sign in with your channel manager or partner credentials.

2. Click Sales and click Deal Registrations.

3. On the Deal Registrations page, select the appropriate deal registration in Draft status.

4. In the Products region of the Edit Deal Registration Summary page, click Browse Catalog.

5. On the Browse Sales Catalog page, you can click Settings and select to filter the catalog by territory.

6. If you have multiple catalogs, you can select the catalog you want to browse in the Browse region.

7. In the Catalogs region, you can click the name of the catalog to expand the catalog and browse its contents.

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

8. In the Select column of the Product Groups and Products region, you can click the Select icon to add that product group or product to the deal registration.

9. After you have selected all of the product groups or products you want to add to the deal registration, click Done.

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

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

Managing Partner Opportunities: Overview

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

Partner opportunities have the following benefits:

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

How Partner Accounts Are Added to Opportunities

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

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

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

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

Note: By default, partners are assigned to opportunities using territory-based assignment.
Partner Lead Attributes in Opportunities: Explained

Leads can be converted to deal registrations which can then be converted to opportunities, or leads can be converted directly to opportunities. Partners can use the Lead to Deal Registration Conversion feature on the Lead Deal Registrations subtab to convert a lead to a deal registration. When a lead is converted to a deal registration, the lead details and team members are copied to the deal registration, any associated deals are shown on the Lead Deal Registrations subtab, and the Lead is stamped on the deal registration.

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

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

<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Sales Account</td>
<td>Sales Account</td>
</tr>
<tr>
<td>Estimated Close Date</td>
<td>Estimated Close Date</td>
</tr>
<tr>
<td>Date Approved</td>
<td>Creation Date</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Expiration Date</td>
</tr>
<tr>
<td>Deal Approved By</td>
<td>Owner</td>
</tr>
<tr>
<td>Deal Approved By Resource Org</td>
<td>Resource Org</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Budget</td>
</tr>
<tr>
<td>Budget Amount</td>
<td>Budget Amount</td>
</tr>
<tr>
<td>Currency Code</td>
<td>Currency Code</td>
</tr>
<tr>
<td>Partner</td>
<td>Partner</td>
</tr>
<tr>
<td>Partner Type</td>
<td>Partner Type</td>
</tr>
<tr>
<td>Partner Program</td>
<td>Partner Program</td>
</tr>
<tr>
<td>Owner</td>
<td>Primary Partner Resource</td>
</tr>
</tbody>
</table>

The following table lists the mapping of lead contacts attributes to opportunity contacts attributes.
### Lead Attribute vs Opportunity Attribute

<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Contact</td>
</tr>
<tr>
<td>Contact Role</td>
<td>Contact Role</td>
</tr>
<tr>
<td>Primary</td>
<td>Primary</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Product</td>
</tr>
<tr>
<td>Product Group</td>
<td>Product Group</td>
</tr>
<tr>
<td>Currency Code</td>
<td>Currency Code</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Unit Price</td>
</tr>
<tr>
<td>Amount</td>
<td>Revenue Amount</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>Estimated Close Date (header)</td>
<td>Close Date</td>
</tr>
</tbody>
</table>

### Partner Visibility into Opportunities: Explained

By default, the channel account manager who owns the partner account automatically has visibility into all opportunities that his partner creates. On these opportunities, the channel account manager can see all the partners associated with the opportunity using the partner subtab. He can also view the primary partner on the opportunity summary page and on the revenue line (if the partner is exposed with Page Composer).

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

While partner users can select accounts and contacts they have access to, administrators can enable validation to prevent partner users from changing certain attributes.
Additionally, partner users can only view resources from their own company on the opportunity team. Any additional internal resources or resources that belong to other partners on the team are hidden. Similarly, the resource selector on the team tab is also limited to show only the resources that belong to their partner company.

Checking for Duplicate Opportunities: Explained

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

Checking for Duplicate Opportunities

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

FAQs About Partner Opportunities

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

You need specific user roles to see partner functionality in opportunities. Contact your administrator for more details.

Note: If administrators removed some fields from the opportunity page layout, then you won’t see the Partners tab, the Primary Partner field, and the partner column on the revenue line in opportunities even if you have the correct user roles.
Managing MDF

Marketing Development Funds (MDF): Overview

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

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

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

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 life cycle. The MDF objects are as follows:

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

MDF Budgets

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

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

Channel managers can do the following with MDF budgets:

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

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

MDF Requests

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

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

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

Channel users can do the following with MDF requests:

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

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

- View all requests they have permission to see from their partner company.
- Create and submit requests.
- Add activities, appointments, tasks, and notes to the request.
- Permit other members of the partner company to view or edit the request.
- View MDF claims on approved requests.
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 all claims submitted by their partner company or just claims associated to a specific request. Partner administrators can see all requests and claims for the enterprise. Channel users can track the progress of their partners' claims from submission to payment. They can see a list of all the MDF claims submitted by partners. Channel users can also access MDF claims from a specific MDF request. On behalf of a partner, a channel user can create and submit MDF claims against any approved MDF request.

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

MDF Claim Settlements

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

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

Using the MDF Audit Report for Channel Managers: Explained

Sales administrators and channel managers can use the MDF audit reports to track any changes to standard and customer-defined attributes of both parent MDF objects and their child objects. You can track new, updated, and deleted records for the MDF objects and for the attributes of the MDF objects that are enabled for auditing.

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

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

What Is Audited for MDF?

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

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

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

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

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

<table>
<thead>
<tr>
<th>MDF Object Name</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDF Budget</td>
<td>Budget Code</td>
</tr>
<tr>
<td>MDF Budget Team</td>
<td>Resource ID</td>
</tr>
<tr>
<td>MDF Budget Countries</td>
<td>Country Code</td>
</tr>
<tr>
<td>MDF Request</td>
<td>Fund Request Code</td>
</tr>
</tbody>
</table>
4. Run the search.

The default MDF audit report returns the following information:

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

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

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

- Attribute
- Old Value
- New Value

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

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

<table>
<thead>
<tr>
<th>Business Object Type</th>
<th>Context Name1</th>
<th>Context Name2</th>
<th>Context Name3</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDF Budget</td>
<td>Name</td>
<td>Type</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Request</td>
<td>Name</td>
<td>Partner</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Claim</td>
<td>Name</td>
<td>Partner</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Claim Settlement</td>
<td>Name</td>
<td>Partner</td>
<td>Amount</td>
</tr>
<tr>
<td>MDF Budget Team</td>
<td>Name</td>
<td>Organization</td>
<td>Role</td>
</tr>
<tr>
<td>MDF Request Team</td>
<td>Name</td>
<td>Organization</td>
<td>Role</td>
</tr>
</tbody>
</table>
8. To export the audit report to Microsoft Excel, select the **Export** action from the Action menu.

### Exporting MDF Objects and Attributes: Explained

Sales administrators and channel operations managers can export MDF object data to a file so they can update balances or process claims externally with third-party financial tools and perform mass updates to MDF Budget teams, MDF Request teams, and MDF Claim teams (team ownership, team members, team access level or function) then import the new teams. The column headers in the output file are recognized when you reimport your MDF objects, which allows the import process to automatically map the MDF object values.

Sales administrators and channel operations managers can export the following:

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

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

### Exporting MDF Data

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

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

Creating a Pending My Approval Saved Search for MDF Objects: Procedure

Channel managers and other MDF object approvers can use a record set in the advanced search page to create a Pending My Approval saved search for MDF objects, including MDF requests and MDF claims. This saved search shows all MDF requests or MDF claims that are pending approval by the signed in approver.

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

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

Your new saved search appears in the Saved Search list.

MDF Request and MDF Claim Approvals: Explained

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

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

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

Viewing Approval History Information
The following table lists the information available on the Approval History region or subtab.
### Type of Information Shown

<table>
<thead>
<tr>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Assignee</td>
</tr>
</tbody>
</table>

The current assignee can do the following:

- View assignee information, including both the current and future assignees.
- If the MDF request or MDF claim is assigned to one or more users, then the full person name for each assignee is shown, including the date and time.
- If the MDF request or MDF claim is assigned to one or more approval groups, then each user in the group is displayed.
- If the MDF request or MDF claim is assigned to one or more job roles, then the role name for each role is displayed separately, including the date and time.
- If an approval stage for the MDF request or MDF claim has multiple approvers, the current assignee can identify which approvers are required to approve in that stage.

### Actions Performed

Actions performed information is displayed chronologically, starting with the latest action performed.

Approval history tracks the following performed actions:

- Submitted by
- Approved by
- Returned by (Return reason and Comments if provided by approver)
- Rejected by (Reject reason and Comments if provided by approver)
- Withdrawn by
- Delegated by
- Escalated by
- Reassigned by

### Future Approvers

Future approvers can be users, groups of users, or job roles.

If the future approver is a user, then the full person name for each approver is shown. If the future approver is a job role, then the descriptive name of the role is shown. Users with the specified role won’t be shown.

---

### Approving MDF Requests and MDF Claims

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

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

- Approve
- Reject
- Return

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

The list of actions changes depending on the status of the request or claim and the user’s role. For example, when an MDF request or MDF claim is in Draft status, partner and channel users can see the Submit and Delete actions. When an MDF request or MDF claim is in Pending status, approvers can see the Approve, Reject, and Return actions.
The following table shows all of the approval actions and provides a description of each.

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

FAQs About MDF

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

Access to MDF records is based on team membership for both channel and partner users. However, by default, only partner users with either the Partner Sales Manager or the Partner Administrator role have access to MDF records. The following table shows the three levels of access for team members, including Full, Edit, and View.
### Access Level | What Team Members Can Do
--- | ---
**Full** | Team members with full access can edit the MDF record, and can add or remove team members and change the owner of the MDF record.

**Edit** | Team members with edit access can edit the MDF record, but they can’t make changes to the team or change the record ownership.

**View** | Team members with view access can only view the MDF record.

---

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

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

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

Defining a Partner Program: Overview

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

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

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

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

3. Define or update program benefits.
   
   Channel managers can also define the proposed benefits for the program.

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

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

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

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

Partner Program Actions and Status: Explained

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

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

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

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

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

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

**Partner Program Approval: Explained**

By default, partner programs are automatically approved after the user selects the Publish action. When the program is approved, it's immediately published and ready for partner enrollments. However, if you’re using modified workflows for approval, the following occurs:
The approver receives a notification and opens and reviews the partner program. The approver can then approve or reject the program. When the partner program is approved, it’s automatically released for enrollment and the program status changes to Published.

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

### Eligibility for Partner Programs: Explained

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

#### Eligibility Criteria

Programs can be targeted to partners based on:

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

### Partner Program Benefits: Examples

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

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

### Scenario

A channel manager creates a partner program with benefits like free training and platinum support.
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 re-sellers, systems integrators, and distributors. You can make partner programs global or specific to a country, and you can choose to use a tiered structure in your programs if you want. Partner programs provide benefits to approved partner enrollees.

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

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

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

Channel managers can use the Programs pages to:

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

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’re creating.
4. From the Type list, select the type of program you’re creating, such as Technology Partner, Re-seller, or Distributor. This is the type of partner you’re targeting with the program.
5. From the Owner list, select the owner of the program you’re creating.
6. If you want to designate the program for a specific country, you can select the country from the Country list. Selecting All will allow the program to be global.
7. If you want the program to begin or end on a specific date, you can use the Start Date and End Date fields to indicate the date.
8. If you don’t want to publish your partner program, click Save and Close. Otherwise, click Save and Continue.
9. If you clicked Save and Continue, you can now publish the program by selecting the Publish action.
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.

✏️ 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.

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

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

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 has been removed from all partners and programs that are using it.

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

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.

FAQs About Partner Programs

**What are benefit value types?**

Partner program benefit value types determine how the benefit is linked to a partner program or a program tier. A benefit can be associated with the following types of values:

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

**Can I create a benefit?**

Users with the channel operations manager job role can define partner program benefits. Benefits communicate the value of the program to your partners. Partners are eligible for the benefits when their enrollment in your partner program is approved.
Why can't I find a partner program that I approved?

After you approve a partner program, another user in your channel organization can change the status to Draft and delete the program. So, even though you approved the partner program, you might not be able to find it.
Chapter 11
Managing 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. Partners can use their access to the channel organization’s applications to 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 in the channel organization's application.
2. Confirm basic information like the organization, language, and so on.
3. Select a start date for the enrollment.

**Note:** The start date can’t be past or prior to the active dates of the partner program. If partners don’t specify a start date, the approval date of their enrollment becomes the start date for the enrollment.

4. Complete the questionnaire.
5. Accept the agreements associated to the partner program.
6. Review and submit the partner program enrollment request.

Partner Program Enrollment Statuses: Explained

A partner program enrollment goes through many statuses during its life cycle.

It can have any of the following statuses:

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

**Note:** To expire a partner program enrollment, you must run either an ESS job or a WebService.

Approved

The enrollment is active and its end date is within the program’s end date.

Expired

The enrollment end date is beyond the program’s end date.
To expire a partner program enrollment, you must run the Partner Program Enrollment Expiration Job ESS job or a WebService with the following information:

- Service: PartnerProgramEnrollmentService
- Port: PartnerProgramEnrollmentServiceSoapHttpPort
- Operation:
  - expireProgramEnrollment
  - expireProgramEnrollmentAsync

Renewed
The partner has renewed the enrollment.

Rejected
The enrollment request was rejected. Approvers can reject or approve an enrollment at their discretion based on the contract, responses to questionnaire, and so on.

Terminated
The enrollment was terminated. Termination can occur at the supplier’s discretion or when a program is decommissioned.

Pending Approval
The partner has submitted a request for enrollment, but the enrollment 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 operations managers can manage partner program enrollments for their partners by approving partner enrollment requests, enrolling partners in programs, editing enrollment summary information, and renewing partner enrollments. The most common tasks channel operations managers perform with enrollments are grouped together on the Actions menu.
Creating, Submitting, and Approving Enrollment Requests: Explained

Channel operations managers can use a simplified list of partner program enrollments, across all of their partners or by individual partner, to easily manage the enrollments for their partner accounts. Channel operations managers can quickly create new enrollments, submit them for approval, and approve them.

Creating, Submitting, and Approving an Enrollment Request for a Partner Account

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

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

Your new enrollment now appears in your main list of enrollments.

Renewing a Partner Program Enrollment: Points to Consider

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

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

Enrollment Renewal Process

Partner program enrollment renewal is available:

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

The process is the same for both instances: select Renew from the Action menu on the Enrollment Details page.
The renewal process is identical to the enrollment flow and is approved by the channel organization. When approved, the enrollment starts on the approval date, and remains in effect for the term specified in the program.

Terminated Programs

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

Renewing Enrollments for Partners: Overview

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

Renewing Partner Program Enrollments

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

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

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

FAQs About Partner Program Enrollment

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

Partner programs can have terms with duration in days, months, or years. When partners enroll in a partner program, they must apply for renewal by the end of the program’s term. An automatic enrollment renewal can be set up. Optionally, an enrollment term can be null. A program enrollment term defined as null has no expiration.

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

When you select the **My Partners' Enrollments** list in the Partners work area, the application displays a list of enrollments for partners where you’re on the partner team. You’re automatically on the partner team if you created the partner or you can be assigned to the partner team either by another team member of an automatic process.
What enrollment records do the different record sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of information. The following table lists and describes the record sets for enrollments. Not all record sets are available to all users.

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

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

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

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

What's a term expiry warning?

The number of days, weeks, or years from the partner program enrollment end date when a partner is notified of an expiring enrollment and is sent a renewal notification template. By default, the term expiry warning is set to 30 days, 60 days, or 90 days. For example, if the term expiry warning is set to 90 days and if the enrollment will expire on January 01, 2012, then the renewal notification is sent 90 days prior to this date on October 01, 2011.
12 Managing Partner Assets

Partner Assets: Overview

A partner asset is a specific instance of a product owned by a partner account. Partner assets can be specific instances of ownership for tangible products like computers, automobiles, or equipment parts, or they can be contracts for intangible things like services, software, or licenses and agreements.

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

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

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

![Product Groups Diagram]

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

Partner Asset Subtabs

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

- **Summary**: Provides a summary of the asset.
Managing Partner Assets for Channel Managers

Managing Partner Assets for Channel Managers: Explained

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

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

Creating or Editing Partner Assets

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

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

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

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Owner</td>
<td>This field is automatically populated with the name of the partner account you’re currently viewing.</td>
</tr>
<tr>
<td>Asset Number</td>
<td>This field indicates a unique identification number for the asset. This number is automatically generated. However, it can be overwritten.</td>
</tr>
<tr>
<td>Serial Number</td>
<td>If the asset includes a serial number, you can type it in this field.</td>
</tr>
</tbody>
</table>
### Chapter 12
Managing Partner Assets

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

**7.** Click **Save and Continue**.

**8.** You see the following additional fields.

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

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

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

### Adding Team Members to an Assets Team
Channel managers can use these steps to add team members to an asset team for their partners:

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

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

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

Creating Leads, Opportunities, or Service Requests for an Asset

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

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

Exporting a List of Partner Assets

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

1. Sign in with your channel manager credentials.
2. Click **Partner Management** and **Partners**.
3. From your list of partners, select the partner that has the assets you want to export a list of.
4. Click the **Assets** subtab.
5. On the Assets page, click **Export**.
6. Indicate where you want to save the exported list of your partner’s assets.
7. Save your work.

Deleting an Asset

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

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

Reinstating an Asset

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

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

Managing Partner Hierarchies: Explained

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

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

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

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

<table>
<thead>
<tr>
<th>Graphical (Chart) View</th>
<th>Table View</th>
</tr>
</thead>
<tbody>
<tr>
<td>See the hierarchy and the current active hierarchy version.</td>
<td>See the hierarchy and the current active hierarchy version.</td>
</tr>
<tr>
<td>Use the Control Panel tools to change the hierarchy layout, move the hierarchy around, center the hierarchy in the view, and increase or decrease the amount of zoom.</td>
<td>See the Type, Location, and Primary Contact for each node in the hierarchy.</td>
</tr>
<tr>
<td>Use the carousel view scroll between three pages of information for the partner, including:</td>
<td>N/A</td>
</tr>
<tr>
<td>Page One</td>
<td></td>
</tr>
<tr>
<td>• Offered Leads</td>
<td></td>
</tr>
<tr>
<td>• Pending Deal Registrations</td>
<td></td>
</tr>
<tr>
<td>• Open Opportunities</td>
<td></td>
</tr>
<tr>
<td>• Active Enrollments</td>
<td></td>
</tr>
<tr>
<td>Page Two</td>
<td></td>
</tr>
<tr>
<td>• Type</td>
<td></td>
</tr>
<tr>
<td>• Status</td>
<td></td>
</tr>
<tr>
<td>• Owner</td>
<td></td>
</tr>
<tr>
<td>Page Three</td>
<td></td>
</tr>
<tr>
<td>• Contacts</td>
<td></td>
</tr>
</tbody>
</table>
## Adding a Parent Partner

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

**Adding a parent partner from the Profile page:**

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

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

**Adding a parent partner from the Hierarchy page:**

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

## Viewing a Partner Hierarchy

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

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

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

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

**Creating a Partner Hierarchy**

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

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

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

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

**Managing Partner Relationships: Explained**

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

**Viewing Your Partner Relationships**

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

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

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

**Adding New Partner Relationships**

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

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

   The page refreshes to show a list of all relationships for the selected partner.
6. Click **Add**.
7. Provide the following information:

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

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

8. Click **Save**.
Managing Partner Service Requests

Managing Partner Service Requests for Channel Managers: Explained

If the Service offering has been enabled for your implementation, channel managers can use the service request tools to efficiently resolve any issues that their partners are experiencing. These tools include a Service Request subtab and a Service Request infolet. The Service Request subtab is available on the Edit Partner pages, and can be configured to appear on other pages, such as Deal Registration and Opportunity pages. Channel managers can view the Service Request infolet on the Partner Overview page.

Where Do Channel Managers Find These Service Request Tools?

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

How Do Channel Managers Use the Service Request Subtab?

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

What Information Does the Service Request Infolet Show?

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

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

Creating a Service Request for a Partner: Procedure

When channel managers create a service request on behalf of their partners, the partner in context automatically becomes the partner on the service request and the channel manager can select the primary contact for the service request from a list of contacts for the partner company.

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

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

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

7. Click **Save and Close**.
Managing Partner Activities

Partner Interaction Activities: Explained

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

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

Viewing and Managing Partner Activities

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

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

Creating Partner Tasks from a Template: Explained

Channel managers and partner administrators can create tasks for partners from a task template. If a valid task template has been created and the ‘smart’ Create Task button has been added to the Embedded Task List Overview page of the Activity object, then a Create Tasks from a Template option is available from the Create Task button. If no valid task templates have been created, then you do not see the Create Tasks from a Template option.

To create tasks from a task template:

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

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

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

The tasks are created from the template.
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 must reach within the first quarter for a specific product line in a specific geographical region.

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

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

Partners do not have access to this tab.

Creating Partner Business Plans and Objectives: Procedure

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.
17 Managing Partner Assessments

Partner Assessments: Overview

Assessments include weighted questions and possible responses that are scored. Channel managers can use partner assessments to evaluate their partners at different stages, including recruitment, engagement, and delivery. Channel managers select the appropriate assessment template, provide responses for all of the questions in the selected template, and achieve a score. They can use this score to evaluate the health of the assessed partner.

Assessing a Partner: Explained

Channel managers can use these steps to assess a partner.

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

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

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

Using Oracle Social Network to Collaborate with Your Partners: Explained

Channel organizations and partners can use the social network to collaborate. Channel organizations can invite their partners to Conversations.

Partners can use the social network to collaborate with users inside the channel organization. They can:

- Have an ongoing Conversation about, for example, how to best sell a brand owner’s product.
- Share presentations and review documents to get feedback from other members of the sales team.
- Receive real-time notifications about updates to key Conversations.
- Determine how they want to follow-up on items based on priority indicators.
- Start or join online conferences with other members of the sales team.

Channel users can see a list of all Conversations the selected partner is in from the Social subtab on the Edit Partner page for the selected partner. Channel managers can't invite partner users to available Conversations that are linked to a business object, such as an opportunity. Channel salespeople on the social network are aware when a partner is in the Conversation because there are distinct banners, warnings, and badges highlighting the partner user.

Partner users can access the Oracle Social Network from the Social icon on their Home page. Partners can only engage in Conversations they have been added to by employees of the channel organization. Partners can’t see things like employee wall posts or public Conversations.

Inviting Partners to Join Conversations: Procedure

If Oracle Social Network has been enabled for the appropriate partner users, sales managers or channel account managers can invite the partner users into the social network. Use the following steps to invite partners to a Conversation. Channel account managers can invite partners to both new Conversations and existing Conversations.

Channel managers can use these steps to invite a partner user to join a Conversation.

1. Channel account managers or channel sales managers create a new Conversation in Oracle Social Network.
2. In the Search for and Add New Members field, type in the email address for the partner you want to invite and click Invite.

   
   Note: If this is the first time a partner has been invited to into the Oracle Social Network, the channel manager must use the partner’s email address to search for and select the partner to invite. After partners are registered within the Oracle Social Network, channel managers can search for them by name or by email address. The channel manager can now see a user name and avatar for the registered partner.

3. At the prompt indication an invitation will be sent to the indicated partner, click OK to send the invite.
4. Click OK in the Create New Conversation dialog.
5. The indicated partner receives an invitation to join the Conversation.
6. The invited partner can click the links in the email invitation and join the Conversation to post messages and participate in the discussions.
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.